



2015

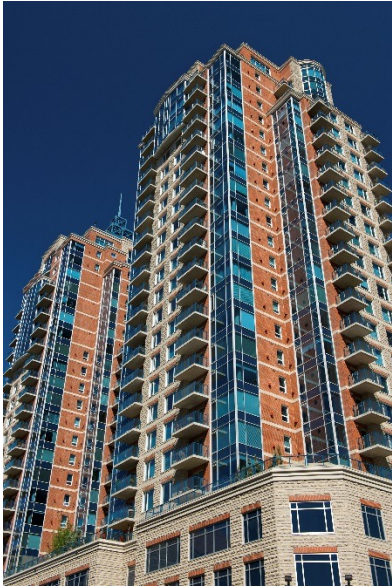
OREGON CHAPTER  
*community*  
ASSOCIATIONS INSTITUTE

# Membership Directory





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# American Benefits, Inc.

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## President's Message

Dear Members and Friends:

On behalf of the Oregon Chapter of Community Associations Institute, I am pleased to present the 2015 edition of the CAI-Oregon Membership Directory. CAI-Oregon is one of approximately 60 active Chapters internationally. This directory is one of the benefits of your membership. Additionally, whether you are a business partner, management company, manager, or community association volunteer leader, you also receive value from your membership in the form of:

- Networking, educational, sponsorship, and advocacy opportunities in your Chapter;
- Member discounts on advertising in the Chapter newsletter;
- Member discounts on exhibits and sponsorships at Chapter meetings, social events, the Chapter website, educational seminars, and other events;
- Free resources available online at the CAI National website;
- Discounts on purchases of training and resource materials from the CAI National website.

The primary contact person on your membership also receives informative publications such as:

- Common Ground – a bi-monthly magazine for all members;
- Minutes – CAI's bi-monthly newsletter for Community Association Volunteers;
- Law Reporter – CAI's newsletter for attorneys on emerging laws;
- Community Manager – a bi-monthly newsletter for managers;
- Fast Tracks – an e-newsletter sent out about 10 times a year with brief articles focusing on industry trends and issues;
- InCommon – Oregon Chapter's quarterly newsletter.

This directory provides an opportunity to obtain the most from your CAI-Oregon Chapter involvement. It contains contact information for business partners, community managers, and volunteer leaders that offer products, time, experience, and service to our industry and communities. It also provides a convenient listing of CAI-Oregon members and contains valuable sources for networking, education, and advocacy. When searching for a service provider, please give due consideration to these industry professionals who support our mutual goals for providing excellence to community members.

Our membership continues to grow and CAI-Oregon remains a significant resource and voice for associations throughout our state. Watch your email for information about upcoming events and important legislative updates. Our major educational offerings—Essentials of Community Volunteer Leadership and Selected Topics in Community Association Management—provide important association tools and education. In addition, our monthly luncheons provide a valuable time to learn from other CAI Oregon members, as well as an opportunity to network and socialize.

We are looking forward to our Chapter Golf Tournament and our Central Oregon Regional Council (CORC) Golf Tournament, as well as multiple and varied social opportunities throughout the course of this year. Please visit CAI-Oregon's website, [www.caioregon.org](http://www.caioregon.org), and check out the 2015 Calendar of Events for dates and locations. We have a very active committee system and we encourage you to participate in Chapter and CORC events and to join and serve on our committees.

We encourage our members to share with others about the value they receive from their CAI-Oregon membership. Our members are our greatest resource and we encourage you to reach out and invite people you know to join us as we continue to be the premiere resource in Oregon for community association professionals and volunteers.

On behalf of the CAI-Oregon Board of Directors and CORC, I wish to thank all members who are able to sponsor, advertise, or volunteer time and participate in our activities. This is your Chapter and we rely on you in order to ensure the continued success of CAI-Oregon. Please contact our Chapter Executive Director, Laura McDermott, or any Chapter or CORC board member if you have comments or suggestions you would like to share with us.

As always, we deeply appreciate your support and involvement. Thank you.

Sincerely,  
Barb Casey  
2015 Chapter President



# Introduction

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## **Directory Use**

The information contained in this directory may not be used for commercial purposes. This directory was prepared to serve the membership of CAI Oregon. Except to facilitate or conduct CAI business, this directory may not be reproduced by any means, added to databases, or converted to any other format without the expressed written consent of the Community Association Institute Oregon Chapter Board of Directors.

## **Notice to Members**

Acceptance of advertising in this directory does not constitute endorsement by the chapter or its board. Advertisers assume liability for all content of advertisements printed, and also assume personal liability for any claims arising from those advertisements against the publishers of this directory.

## **Corrections**

This directory was prepared using the information provided by members contained in the CAI National member database as of February 1, 2015. Members who joined CAI Oregon after that date or those whose memberships have lapsed may not be listed. Every reasonable effort has been made to ensure that all members are listed properly. If we have made an error, please accept our sincere apology and relay correct information to:

## **CAI Oregon Chapter**

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[contactus@caioregon.org](mailto:contactus@caioregon.org)

## About CAI

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# America's Advocate for Responsible Communities

Community Associations Institute (CAI) is dedicated to fostering vibrant, competent, harmonious community associations, both nationally and internationally.

For over 40 years, CAI has been the leader in providing education and resources to the volunteer homeowners that govern community associations and the professionals that support them. Our members include community association volunteer leaders, professional managers, community management firms, and other industry professionals that provide products and services to associations.

Working closely with our 60 U.S. and International Chapters, we bring together experts to provide the latest information on community association management and governance. We offer our members educational publications, seminars and workshops, research, continuing education opportunities, and periodicals, including Common Ground magazine and specialized newsletters on community association issues.

CAI also advocates for legislative and regulatory policies that support responsible governance and effective management. We represent the interests of our members before the U.S. Congress, federal agencies, and other policy-setting bodies on matters such as taxes, insurance, bankruptcy reform, and fair housing. In addition, state Legislative Action Committees represent CAI members before state legislatures and agencies on issues including assessment collection, foreclosure, and construction defects.

# CAI Member Benefits

In CAI, you'll find a friendly and accessible forum to develop relationships, increase your knowledge, and help shape the future of the nation's communities.

We offer a variety of resources to help you:

- **Get the Job Done Right**

CAI offers information, resources, tools, and programs that make it easier to govern and manage homeowner associations, and work in the industry that supports them.

- **Develop Skills to Govern or Manage Your Association Successfully**

We hold many educational courses nationally and locally in a variety of formats for board members, homeowners, managers, and other professionals. This includes monthly programs on topics meaningful to communities in Oregon and Southwest Washington, as well as annual special educational events, such as the Essentials of Community Association Volunteer Leadership and the Selected Topics in Community Association Management.

- **Stay Informed**

The Legislative Action Committee follows government Legislation, advocates community interests, and explains to members how new laws will affect the industry.

- **Find Professional Services**

Our network includes community managers and experts in HOA law, reserve studies, technology, banking, insurance, and other relevant industries.

- **Expand Local Connections**

Throughout the year, CAI Oregon plans various social events that allow you to expand your professional network in a relaxed and entertaining environment to help you succeed in your field. This includes a new member welcome reception, member appreciation events, and an annual golf tournament.

- **Deepen Your Knowledge**

CAI's publishing division publishes the largest collection of books and guides on community association governance and management available,

and our "online members only" section provides a number of exclusive specialized resources. CAI's award-winning magazine, Common Ground™, and several specialized newsletters, offer in-depth analyses of legislative trends and practical articles about community association finance, law, and management.

- **Expand Your Thinking**

CAI acts as the driving force for common interest community research, development, and scholarship, conducting research to provide information to those involved in association government and serving as a catalyst for positive change in the industry.

- **Utilize Online Resources**

CAI provides tools for building and managing strong communities, all available 24 hours a day:

**Resource Center:** Offers downloadable templates and sample documents, a "how to" board member tool kit, answers to governance questions, an extensive research library, and more!

**Sign Up for Educational Courses online**

**Networking Center:** Share ideas, issues, and strategies with other members in the discussion board

**Directories:** View the online credentialed professional directory and national service directory

**Government and Public Affairs Advocacy Center:** Learn about the latest legislative efforts being fought on your behalf, get involved, and find your local legislators

**Job Bank:** Find your next star employee through this industry-specific-job-search tool

**Find Out More About CAI Oregon**

Contact: CAI Oregon Chapter Office

17355 SW Boones Ferry Rd

Lake Oswego, OR 97035

Tel: (503) 653-0742

contactus@caioregon.org

# Professional Designations

CAI has two specialized member groups to help us better serve our members and increase the value of membership.

*The Center for Community Associations Volunteers (CCAV)*

*The CCAV is committed to providing the information and support needed by community association volunteer leaders. Its aim is to assist homeowners in becoming effective, efficient, and respected leaders.*

*Association of Professional Community Managers (APCM)*

*Community managers are the professional backbone of the communities they serve, providing knowledge and expertise crucial to the successful management and operation of associations.*

*CAI has created the Association of Professional Community Managers, a specialized member group within the broader CAI community. Whether an onsite, portfolio, or large-scale community manager, APCM is a professional society that focuses on your career, your job, and your professional growth. Best of all, individual manager members of CAI are entitled to these APCM benefits and services at no additional cost:*

- Community Manager, a full-color, bi-monthly newsletter with information and insights tailored to meet your career and professional development needs.*
- An expanded members-only area on CAI's website, featuring tools and answers to commonly-asked questions regarding governance issues.*
- A resource center that includes sample letters and notices, standardized forms, and document templates to adapt for use in your communities.*
- An orientation guide that introduces your board members to their roles and responsibilities.*

## Designations & Certifications

### **CMCA**

Certified Manager of Community Associations

This is the first step in gaining fundamental knowledge needed to manage any type of community association.

### **AMS**

Association Management Specialist

This designation is earned by managers that want to increase their knowledge and expertise.

### **PCAM**

Professional Community Association Manager

This designation is the highest professional recognition available nationwide to managers that specialize in community association management.

### **CIRMS™**

Community Insurance and Risk Management Specialist

This designation recognizes a demonstrated high level of competency within the risk management profession. Note: Community board members are looking for qualified professionals to help them protect their most valuable investments. Obtaining the CIRMS designation can help instill confidence in your skill level and assist in growing your business.

### **AAMC®**

This accreditation demonstrates a community association management company's commitment to providing the unique and diverse services to community associations need. Communities are looking for skilled, dedicated managers; this designation helps increase your potential clientele by showing that you have the skills, experience, and integrity to help communities succeed.

### **CCAL**

College of Community Association Lawyers

This designation proves excellence in the practice of community association law, distinguishing attorneys by highlighting their demonstrated contributions to the development of community association law, commitment to educate and empower communities across the country, high standards of professional and ethical conduct, and work to advance community association law for the betterment of the HOAs they serve.

### **RS**

Reserve Specialist™

This designation is awarded to experienced and qualified reserve specialists. The RS designee has extensive experience in the diverse aspects of component analysis and financial planning.

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Whatever your needs, Union Bank provides solutions that make it easier to control your daily financial operations. Contact us today at 866-210-2333 to learn more.

HOAbankers.com Smartstreet.com   



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# Rights & Responsibilities

## Principles for Homeowners and Community Leaders

There's a difference between living in a community and being a part of that community. Being part of a community means sharing a common desire with your neighbors to promote harmony and contentment, as well as protecting the value and aesthetics of the neighborhood as a whole.

This goal is best achieved when homeowners, non-owner residents, and association leaders recognize and accept their rights and responsibilities, including maintaining a reasonable, logical balance between the best interests of individual homeowners and those of the entire community. It is with this challenge in mind that Community Associations Institute developed "Rights and Responsibilities for Better Communities."

Managing the critical and delicate balance of rights in an HOA is often the essence of effective community leadership, and the way to prevent complicated issues and conflicts. By encouraging associations to adopt Rights and Responsibilities for Better Communities, CAI strives to promote harmony, community, responsible citizenship, and successful leadership. In the process, we have made life better for the estimated 50 million Americans that reside in community associations.

## Let Rights and Responsibilities Help Your Community

The process of formally adopting Rights and Responsibilities will serve as an important guidepost for all those involved in the community. The document can serve as a tool to educate new homeowners and residents about their own rights and responsibilities, and can also create positive publicity for your community.

By adopting Rights and Responsibilities, communities will help prevent unnecessary or unduly restrictive legislation and regulation. As more associations adopt these principles, communities across the country will move closer and closer to higher levels of efficiency that come from proactively addressing issues through self-regulation.

## How You Can Make it Happen

Adopting Rights and Responsibilities for Better Communities is easy!

- Download the Rights and Responsibilities document.
- Distribute the document throughout your community, announcing and publicizing where and when adoption will be considered.
- Explain why this is important to your community and the benefits it can offer.
- Review and discuss the merits of the principles at an open meeting of your board of directors.
- Solicit input from homeowners.
- Have your board vote to adopt a resolution endorsing Rights and Responsibilities for Better Communities. The principles will be more meaningful to homeowners and community leaders if they are formally adopted.

## Commemorate Your Commitment

When you notify CAI (through a simple online adoption form) that you have adopted Rights and Responsibilities, we will send you a certificate ideal for framing to commemorate your commitment. We will also send you several reproducible copies of Rights and Responsibilities to distribute to your homeowners.

While adopting Rights and Responsibilities will not eliminate all conflict, its adoption can stimulate communication, promote trust and cooperation, clarify expectations and build a greater sense of community. CAI urges you to take advantage of this opportunity, and to let us know when you do!

Please note: The principles are not intended to subsume existing statutes. Where there are inconsistencies, community associations should adhere to the spirit and letter of all applicable laws. If you have a question, we suggest you consult with your attorney.

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# CAI Oregon Chapter 2015 Committees

## Education Committee

**Chair: Keller Baum, I & E**

### Purpose

The Education Committee is responsible for organizing and managing all CAI events that have an educational element. This includes chapter events, as well as CAI standard educational programs. The committee is responsible for ensuring program topics are relevant, speakers are appropriate, and materials presented are within CAI standard guidelines.

### Responsibilities

The Committee will:

- Select topics for luncheons, manager meetings, and special seminars
- Solicit and select speakers for programs and instructors for the CAI educational courses
- Coordinate with the speakers/instructors to ensure materials are appropriate; assist with defining the topic/content; provide CAI curriculum, standard power point template, and/or handout; work with CED to execute the event
- Adhere to and support the standards and guidelines for speakers, instructors, and sponsors as adopted by the Chapter
- Provide administrative support and assist with coordination for CAI National Professional Management Development Programs (PMDP)

## Marketing Committee

**Chair: Sara Eanni, American Benifits**

### Purpose

The Marketing Committee is responsible for crafting a consistent CAI Oregon message and distributing that message to its various audiences through print, online, and other communication channels

### Responsibilities

- Identify the various CAI Oregon audiences, including their demographics, preferences, wants, and needs
- Create an overall CAI Oregon message; tailor the CAI Oregon message for each of the audiences
- Create a style guide that specifies the visual identity for CAI Oregon
- Make sure that all print and online publications distributed under the CAI Oregon brand conform to the accepted style guide
- Coordinate with the other committees to provide them with the marketing materials and other support they need to reach their objectives
- Create and distribute document templates that conform to the style guide, for use by those whom CAI has authorized to produce materials for CAI events
- Produce both print and online originals of marketing collateral, such as brochures, luncheon announcements, educational program announcements, etc.
- Create the quarterly newsletter, inCOMMON
- In conjunction with the CAI executive director, create the annual sponsor packet
- In conjunction with the CAI executive director, create the annual directory
- Publicize CAI Oregon through various advertising and public relations opportunities
- Conduct monthly marketing committee meetings
- Provide monthly reports to the CAI board of directors

# CAI Oregon Chapter 2015 Committees

## Events Committee

**Chair: Julie Balestreri, BPM**

### Purpose

The Social Committee is responsible for organizing and managing CAI social events. The committee ensures the events promote a community atmosphere and introduce the benefits of CAI to new and existing members.

### Responsibilities

To plan, organize, and coordinate all aspects of the following social functions:

- The New Member Receptions
- The Summer Social Event
- The Annual Golf Tournament
- The Annual Meeting/Gala

## Membership Committee

**Chair: Ryan Harris, Vial Fotheringham**

### Purpose & Objectives

Based upon the mission and objectives of CAI, the Membership Committee organizes and manages CAI Oregon Chapter membership efforts. This work includes recruitment of new members, welcoming of new members, promotion of membership benefits, and retention of existing members.

### Responsibilities

- Welcome new members into the organization and provide them with the information and means to take an active part in the organization
- Contact members that are nearing the time of their renewal in order to encourage them to renew their membership
- Contact members that allow their memberships to lapse, reminding them of the value and benefits of their CAI Membership
- Identify and contact vendors that would be good candidates for membership in CAI
- Work with management companies to encourage the membership of their managers and the board members of associations they manage
- Work in conjunction with the Marketing Committee and CAI National to reach out to homeowners and community association volunteers to encourage membership in CAI
- Make presentations to associations and/or their boards regarding the value and benefits of membership in CAI

# Who to Contact at CAI's National Office

## Community Associations Institute

### Mailing address:

6402 Arlington Blvd., Suite 500, Falls Church, VA 22042

**Phone:** (703) 970-9220 (M-F, 9-6:30 ET)

**Toll-Free:** (888) 224-4321 (M-F, 9-6:30 ET)

**Fax:** (703) 970-9558

### Email:

All persons can be reached by name (initial + last name) at the CAI website (i.e. tskiba@caionline.org)

### To Make Corrections to Your Membership and Subscriptions:

Addresschanges@caionline.org

### CAI Direct (Customer Care Center)

Toll-free line: 1 (888) CAI-4321 • Staffed from 9:00am to 6:30pm (ET)

### News, information and resources at [www.caionline.org](http://www.caionline.org)

### Complete CAI National Staff Listing

<http://www.caionline.org/about/who/Pages/StaffExtentions.aspx>

Name	Title	Phone
Tom Skiba	Chief Executive Officer	(703) 970-9266
Crystal Danielson	VP Membership and Chapter Relations	(703) 970-9231
Karen McMullen	Director Membership and Chapter Relations	(703) 970-9247
Frank Rathbun	Communications/Media/Publications	(703) 970-9239
Dave Jennings	VP Education/Executive Director, Foundation	(703) 970-9234
Jennifer Flynn	Director of Governance	(703) 970-9244
Andrew Fortin	VP Government and Public Affairs	(703) 970-9224
Stephen C. Albert	CPA Chief Financial Officer	(703) 970-9264

### Foundation for Community Association Research

(703) 970-9234 • Dave Jennings, Executive Director

### National Board of Certification for Community Association Managers

(703) 970-9235 • Dawn Bauman, Executive Director

## **CAI Oregon Legislative Action Committee (OLAC)**

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The Oregon Legislative Action Committee (OLAC) was formed in 2000. From the start, OLAC has been actively involved with state legislation, by testifying on bills at state legislative hearings, working with other organizations to draft new legislation, and meeting with legislators to sponsor and support proposed bills.

The sole purpose of OLAC is to represent community associations throughout Oregon. OLAC dedicates itself as a sponsor, monitor, and lobbyist for legislation that will positively impact your association, while opposing legislation that would have a negative impact. Part of the OLAC mission is to advocate for a reasonable balance between state statutory requirements and preserving the empowerment of homeowners to self-govern through their association leadership.

The 2011 Legislative Session was the third session to benefit from the partnership between OLAC, its Legislative Advocate, and two other groups: The Condominium/HOA Working Group, whose attorney members have been developing association law for decades, and the Oregon Washington Community Association Managers (OWCAM) organization. The three groups joined resources and hired a lobbyist.

In the 2009 Legislative Session OLAC was successful in seeing a majority of supported bills pass. Also successful were the efforts to change or block potentially detrimental bills.

OLAC is continually proactive in anticipating and responding to future challenges (i.e., establishing minimum quorum requirement), and to update the statutes to change antiquated or inadequate legal documents (i.e., who can serve on a board in the case of ownership by a corporation, trustee, limited partnership, etc.). Of course, some legislation is proposed to assist with a problem that cannot be fixed in any other way, or to fill a void in existing law.

We have gained respect over the last several years and have been asked to work with other organizations that interact with our industry, such as banks, real estate companies, and homebuilders. We reach out to these groups when our legislation might affect their organizations, and work closely with different legislators in an effort to become the first recourse concerning bills relevant to community associations.

## OLAC FAQ

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**Below are a few frequently asked questions:**

### **Is OLAC a political action committee? - NO**

OLAC is a member-driven “grass roots” organization and does not contribute funds to candidates or incumbent politicians. OLAC is able to influence their opinions through education and personal communications by way of our Legislative Advocate. Letters from board members are particularly effective in bolstering the Advocate’s efforts.

### **Is it legal for our association to donate money? - YES**

Most associations’ governing documents do not prohibit monetary donations to other non-profit entities. The board has a duty to spend money wisely and it is prudent to invest in protecting the association and its owners by supporting constructive public policies and opposing unfavorable state legislation. Contributions to the OLAC do not jeopardize your non-profit status and are completely lawful. If you are interested in donating to the OLAC, please contact Denise Bower at (503) 445-1202.

### **Who are the people serving on the OLAC? - VOLUNTEERS**

The Committee is comprised of volunteers: attorneys, managers, consultants, owners, service providers, etc. These volunteer delegates are appointed by the local CAI Chapter and approved by National CAI.

### **What is our donation used for? – EDUCATION & ADVOCACY**

Expenses include research, disseminating information to the committee and CAI members, administration, and consultant and lobbyist fees. Again, no campaign contributions are given to legislators or their campaigns.

### **Is OLAC really effective? - ABSOLUTELY**

We are a leader in providing informed opinions and knowledge to legislators and legislative committees as legislation is proposed and debated.

If you have any further questions or wish to assist the Oregon Legislative Action Committee and its partners in their efforts, please call Denise Bower at (503) 445-1202.

We encourage you to consider a donation to CAI-OLAC today. Your dollars will help us continue to work on your behalf in protecting the community association industry. Please contact us for an OLAC pledge form to mail with your check. Why not make this a line item in your annual budget to show your support?

“Help us help you,” and, thank you for your support!

# Chapter Members

## By Name

### A

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