

# Professional Manager Briefcase



# A Message from the APCM Board

Community managers are the professional backbone of the communities they serve, providing the knowledge and expertise that are crucial to the successful management and operation of associations. CAI's APCM Board has developed the Professional Manager Briefcase to provide you with beneficial information to help you advance your career and serve your communities.

If you are a new manager, there are tools and resources to help you learn more about common-interest communities and association management and begin your journey to becoming a successful professional in your company and community.

If you are an experienced manager, but new to CAI, these resources will provide you with convenient ways to stay current with trends and opportunities and increase your professionalism. The contents of the briefcase will provide references and recommendations for you to learn, grow, advance, engage, connect and elevate your career.

We recommend you bookmark the briefcase, save it to your tablet or desktop and reference it frequently as a guide for ongoing professionalism. This is yet another way CAI is your one and only go-to resource.

The APCM Board is a specialized member group dedicated to giving community managers added advantages on the job, in their careers and in the association marketplace.

The APCM Board provides representation for all CAI manager members and provides recommendations to the CAI Board of Trustees on policies and trends affecting managers. The focus is on you, your career and your professional growth, whether you're an on-site, portfolio or large-scale community manager.

We encourage you to be the best community manager you can be. CAI stands ready to help you reach new heights and elevate our profession.





# LEARN

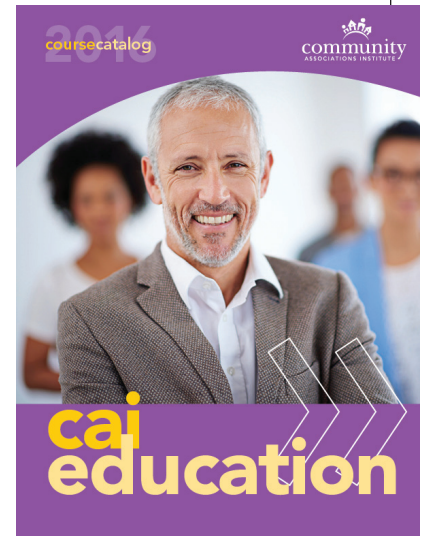
“to acquire knowledge of or skill in by study, instruction, or experience”

CAI is the only international organization offering community management courses to further your education and knowledge. The **education catalog** outlines our many educational opportunities. Manager education can be found through the **Learning Center**.

If you are a new manager, it's recommended you begin your education with **The Essentials of Community Association Management (M-100)**. The course is a comprehensive overview of community association management. Successful completion of this course is the first step in obtaining a professional certification in community association management.

Throughout your educational journey, we recommended you participate in **chapter programs** as well as **webinars**. Chapter programs vary from chapter to chapter and generally focus on local issues, including state legislation and local practices. CAI offers both live and on-demand webinars, so if you are looking for an answer, the webinar library is a good place to start your search. Not only will these educational opportunities increase your knowledge, they may be eligible to meet some designation requirements.

The next step in CAI's professional development program is the 200-level series offering specialized courses including facilities management, communications, leadership, governance, risk management and financial management. There is no recommended order in which you should take the courses. Once you complete two 200-level courses, you will be eligible to apply for your **Association Management Specialist (AMS) credential**. Completion of all six 200-level courses is necessary to apply for the **Professional Community Association Manager (PCAM) designation**, the most widely recognized and respected credential in the community association business.





..... | **GROW**  
“to increase gradually in size, amount, etc.; become greater or larger”

To continue to grow as a community manager and maintain the highest level of professionalism, you'll need 24/7 access to information that will answer questions, help you solve problems and keep you current with community association trends and practices. CAI provides resources, including publications and website content, to give you the information, knowledge and expert perspective you need—when you need it. (CAI website log-in is required for many of the following resources.)

[www.caionline.org](http://www.caionline.org) is one of the most valuable resources in your briefcase. If you have a topic of interest or are searching for an answer about community association management, you are certain to find an article, template, book, course or information. There's no need to start from scratch, CAI has developed **downloadable sample templates and forms**, from bidding and contracting to community operations, insurance and maintenance—and much more.

Advocating for better communities is part of CAI's mission and should be on your agenda as well. As a professional manager, it's crucial you are familiar with the latest regulatory and legislative issues affecting your community. CAI's **Issues & Advocacy** section of the website provides you with up-to-date information on federal and state legislation and regulatory issues.



**CAI Press**, the publishing division of CAI, is dedicated to providing the very best resources for community associations for management professionals, association board members and others. With more than 100 titles, we offer the largest collection of books on association governance, management and operations. If you are looking to go more in-depth on a topic, we have a book for you. CAI Press has excerpts from the most popular topics, including disaster management, finance, insurance, legal resources, meetings and policies, and rules.

If you are looking for information or an article on a given topic, a good place to start is the **Research Library**. This feature will allow you to search many CAI publications simultaneously.



# GROW

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**Community Manager**, a bimonthly newsletter for managers and management company executives, includes information about what's happening in CAI and throughout the industry, as well as resources to improve your management skills. Special sections are geared to the needs and interests of management company owners and large-scale and portfolio managers. The online newsletter archives may be searched to find a specific topic.

**Common Ground**, CAI's award-winning magazine, is the ultimate resource for community association governance, management and operations. Each issue is packed with feature articles and columns designed to help our readers preserve, protect and enhance their neighborhoods by:

- Running productive meetings
- Enforcing rules in consistent and reasonable ways
- Being aware of legislative and regulatory issues
- Planning and budgeting for repairs and replacements
- Performing preventive and ongoing maintenance
- Understanding historical and contemporary trends in common-interest development
- Involving residents in the business of their association
- And doing all the other things, great and small, that build a sense of community.

**Common Ground** is also archived on [www.caionline.org](http://www.caionline.org), so you can search for relevant topics.

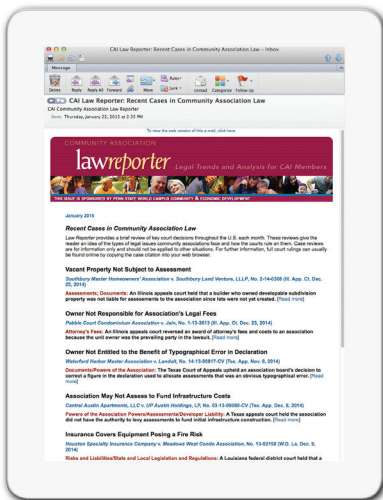
**Community Association Law Reporter** is a monthly e-newsletter designed to provide CAI members with the latest information about court decisions involving community associations. Cases involve such issues as developer liability, lenders' rights and remedies, use restrictions, covenant enforcement, assessment collection and much more. The most recent issues are archived online and are searchable to easily find topics of particular interest.



## Linchpin

The manager is an essential link between a community's property values and the association's architectural review process.

BY JULIE WARREN





# ADVANCE

“to improve, further”

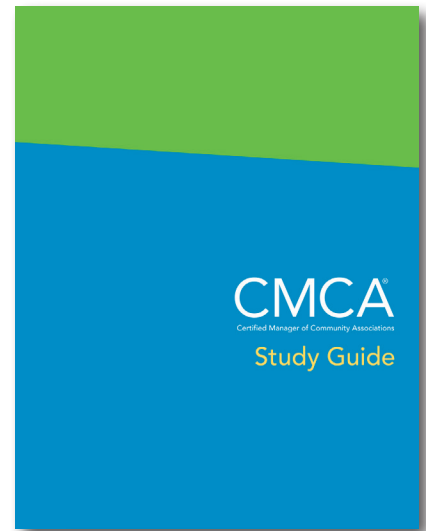
Now that you’ve taken some education courses and used many of the resources available through CAI, it’s time to get a community management professional credential. Community associations and management companies are looking for qualified, dedicated professionals to manage their communities. By obtaining a credential, you’ll gain a competitive advantage, earn more money and obtain valuable experience.

Once you complete and pass the M-100 (or an alternative approved prerequisite), it is recommended you study to take the Certified Manager of Community Associations (CMCA) exam and earn your CMCA designation through the **Community Association Managers International Certification Board (CAMICB)**.

The CMCA is the only international certification program designed exclusively for those who manage homeowners associations, condominium communities and cooperatives. The CMCA recognizes individuals who have demonstrated the fundamental knowledge required to manage these communities.

To facilitate your preparation, CAMICB has developed two important tools to assist you in preparing for the exam.

- **The CMCA Handbook**
- **The CMCA Study Guide**



Once you’ve studied and passed the exam, it’s important to remember that being a CMCA is more than just education and knowledge. Being a true professional means upholding the **standards of professional conduct**.

The next credential you may be eligible for is the Association Management Specialist (AMS), which is offered through CAI. Once you complete two 200-level courses and have two years of community management experience, you will be eligible to apply for your **Association Management Specialist (AMS) credential**.





# ADVANCE

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Completion of all six 200-level courses is necessary to apply for CAI's **Professional Community Association Manager (PCAM) designation**, the pinnacle of professionalism in the association management business. In addition, you must have five years of experience in association management and complete the **PCAM Case Study**, which is a comprehensive examination of an actual community association. This invaluable experience combines classroom instruction and on-site inspection, providing the information and perspective you need to submit a written report.



In addition to CAMICB's standards of professional conduct, CAI provides a **professional manager code of ethics**, which, as an AMS and PCAM, you will be responsible for upholding.

Additional information and details on obtaining and maintaining your professional credentials may be found [here](#).

Now that you are a CMCA, AMS and/or PCAM, you want others to know—your community, your clients, your peers and potential employers. So, the next step is the **CAI Job Market**, where you'll find resources to **spread the word** and educate others on what it means to have a professional community management credential. Resources include:

- **Job Market**
- **Articles and books** on career management
- **Directory of Credentialed Professionals**
- **Digital brochures** that can be used to find the right professional
- Easy-to-use brochures you can use to promote the value and importance of the **AMS, PCAM, and AAMC** designations



**your community deserves the best professionals**



**association management specialist**

community ASSOCIATIONS INSTITUTE



**professional community association manager**

community ASSOCIATIONS INSTITUTE



# ENGAGE

“to occupy oneself; become involved”

Networking and engaging with your peers is one of the most important aspects of being a professional, and that begins with being involved in one (or more) of CAI's **60 chapters**. As a member of CAI, you are automatically a member of the chapter in your geographic region. Every chapter is different and provides a variety of programs and services such as professional development programming, community association board member education, networking opportunities, educational publications and other services to meet the needs of CAI members.

Chapters offer many volunteer opportunities, from serving on the chapter board or committees to writing articles for chapter publications and giving presentations at chapter events. In addition, hundreds of members serve on state legislative action committees. The PCAM application has an option for chapter involvement; this is a great way to meet that requirement. But don't be surprised if you stay involved. You're likely to enjoy it and benefit from the experience of meeting new people and working with your peers to advance the community management profession.

**International events** are another way to engage in your profession. Attending these popular events gives you a broader perspective, allowing you the opportunity to network with community managers and other industry professionals from all over the world. (It probably won't surprise you to learn that pets, parking and people are the same hot-button issues for community managers in Florida, California, South Africa, Australia and Dubai!) Importantly, you'll have opportunities to meet and learn from many product and service providers and to take advantage of education sessions that inform and enlighten even the most experienced professionals.

CAI's **Annual Conference & Exposition**, held every April or May, is the largest event with the broadest appeal for managers. Education sessions focus on operations, leadership, innovative business practices and new products and technologies.







# ENGAGE

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For management company CEOs and senior executives, the **CEO-MC Retreat**, held annually in October, is a “can’t miss” event. It is specifically designed for senior executives to network and learn from each other.



For large-scale managers—defined as on-site managers who manage communities that provide municipal-type services with a minimum of 1,000 units or acres and minimum of \$2 million operating budgets—CAI’s **Large-Scale Managers Workshop** is a one-of-a-kind learning and networking experience. The event is held annually in September and offers tours of host communities and hands-on educational sessions.

The **Community Association Law Seminar**, held annually in January, is a professional event to discuss emerging trends and legislative issues at an advanced level.

Now that you are participating in your local chapter and have attended international events, perhaps you will consider an **international leadership opportunity**. We have annual elections each August to elect representatives to serve on the Board of Trustees and the APCM Board. Elected members give their constituencies a voice in crafting CAI policy and work to ensure that CAI continues to provide services and benefits that members need and value.





# CONNECT

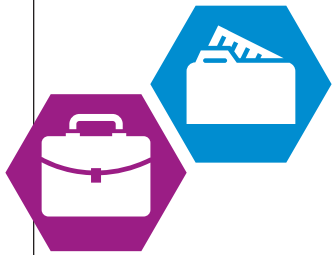
“to establish communication between; put in communication”

In addition to engaging and networking at chapter, national and international events, you need to be part of the conversation. Not only will you continue to learn from your peers, but you can share your experiences, expertise and knowledge with others. With more than 15,000 professional managers and management companies involved in CAI, you will surely find others with similar experiences or those who need your expertise.

CAI is social—that is, our members connect through some of the most widely used social media platforms, including **LinkedIn**, **Twitter** and **Facebook**. Join our group, follow and friend us. Not only will you receive up-to-date industry information, you'll connect with peers to continue your learning.



Another valuable information exchange for managers are listservs. The community manager listserv is open to all community managers. Additionally, CEO-MC and Large-Scale Managers listservs are available to those managers who meet the criteria. CAI listservs are moderated by volunteers. If you are interested in joining, please contact CAI's member service center at [cai-info@caionline.org](mailto:cai-info@caionline.org), and you will be provided with additional information.



# ELEVATE

“to raise to a higher state; exalt; promote”

There is no better way to elevate our profession than to share the message with others.

Be a mentor to a less experienced manager, either formally through a local chapter or informally with a peer. Being a mentor allows you to share your experiences with others. It helps the mentee set goals and have someone to encourage and build confidence. As a mentor, you gain personal fulfillment and often learn from your mentee as well.

Word of mouth is the best form of promotion. CAI continues to grow, enabling us to continue to advocate on your behalf, build resources and services for communities and promote the value of the community management profession. Members build membership. Every new member brings added credibility to CAI and the industry. CAI offers tools through the **Recruiter Club** to help you share CAI with others.

Count yourself among those who support CAI, our industry and associations across the country. Each new member makes CAI a stronger and more effective advocate for you.



*We encourage you to share this document with community management colleagues who may benefit from the wealth of information provided on the CAI website. Some of the links require a CAI member log-in; others do not.*



The Professional Manager Briefcase was developed by the 2014 APCM Board.

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