CAI-CV Past Presidents' Memories
A Historical Timeline of the David-Stirling Common Interest Development Act
Terry O'Brien—A Fond Remembrance
Photos Throughout the Chapter Years
The Times They Are [Not Always] A-Changin…

1993

1996

1998

2000

2002

2004

2006
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5:30 p.m.
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I know you will all enjoy this special retro edition of Quorum as we look back at the success and growth of CAI-CV over the past thirty plus years. Enjoy reminiscing while looking at the amazing pictures from past events and workshops. I think you will agree that this issue is testimony to CAI-CV’s capabilities in networking and relationship building. We continue to be a catalyst for new relationships between businesses, community association managers and association board members. CAI-CV is committed to continuing this noble tradition of matchmaking.

We can all be proud of our Chapter’s historic accomplishments. The benefits CAI-CV has brought to residents and businesses in the Coachella Valley is remarkable. Perhaps our greatest accomplishments can be linked to the outstanding work CAI-CV has done to educate association managers. The Zagby International survey is proof that homeowners in our communities value the services we provide. With recent homeowner and board approval ratings from 83% to 92%, there is no doubt that CAI members have had a tremendous positive impact on our communities. We have measurably increased professionalism in the association management industry. Thank you to all our members for making this extraordinary success possible.

Looking forward, we can expect our leadership in association management to increase. Even with a sluggish economy, our membership has grown at a steady 4 percent pace. With this increase in membership, CAI-CV has become widely recognized as the preeminent authority on association managed communities.

As the Board begins the strategic planning process later this month, we will be looking at ways to further increase our influence by increasing membership with association managers, businesses and association volunteers. Did you know that of the 42,500 associations in California, fewer than 2,000 are currently members of CAI. Let’s work together to get our local associations to join CAI-CV. The Board will also be looking at new educational opportunities for association managers and, of course, we are searching for new ways to highlight our business partners. As legislation and regulations continue to impact our industry, we want to increase our chapter’s participation with the California Legislative Action Committee (CLAC) and help them build solid relationships with the elected officials who represent the Coachella Valley. If you want to share your ideas about building our future with the Strategic Planning Committee, please email me or Cal Lockett at clockett@cai-cv.org.

There are a few upcoming events I want to make sure you have calendared. On Friday, August 8, we will host the next Manager on the Run program (MOTR), “Board Relations, Leadership and How to Deal with Difficult Boarders,” at 8:30 AM at Palm Desert Country Club Association. The Muqo Essentials of Community Association Management will be held Thursday-Saturday, August 14, 15, 16, at the Homewood Suites in Palm Desert. One of our greatest networking opportunities of the year, the annual Casino Night, Cirque du Soleil, will be held on Friday, September 19, at 5:30 PM, at Heritage Palms Country Club. We expect another record turnout this year and there are many opportunities to get involved as a volunteer and sponsor. On Saturday, October 24, we will have our first-ever Wine Tasting at Shadow Mountain Resort and Tennis Club. A pre-wine champagne reception begins at 5:30 PM. This event includes a silent auction and a grand prize raffle. Proceeds support our chapter’s participation with CLAC. Assemblyman Nestande has agreed to attend and looks forward to meeting CAI members at the event. We have also invited all of the Coachella Valley elected officials to attend so you won’t want to miss this opportunity.

Additional information about these events can be obtained by calling or emailing the Chapter’s office at (760)341-0559, Fax: (760)341-8443. E-mail: clockett@cai-cv.org.

CAI-CV MISSION STATEMENT

The mission of CAI is to provide the leadership for successful development and operation of community associations through information, research and education.

President’s Message
Christina Baine DeJardin, Esq., Peters & Freedman, LLP,
CAI-CV Chapter Board President

CAI-CV Board Selects Former Corporate Executive as its New Chapter Executive Director

In late June, the CAI Board of Directors selected Mr. Callen (Cal) M. Lockett to serve as their Chapter Executive Director (CED). Mr. Lockett joined the CAI-CV chapter on Monday, July 14, 2014. After a three month search conducted by CAI National and CAI-CV’s Board, Mr. Lockett was chosen from a list of outstanding candidates. “Our deepest gratitude goes out to the board search committee and also to all those who applied for this position,” said Chapter President, Christina Baine DeJardin. President Elect, Tad Black, said “... the Board believes Cal brings CAI-CV a great deal of experience and leadership that will help position our chapter to have a greater impact on our communities. Please join us in welcoming Cal to CAI.”

Cal will work from the CAI-CV office located at 4905 Boardwalk, Suite A2, Palm Desert, CA 92211-9091. Phone: (760)341-0559. Fax: (760)341-8443. E-mail: clockett@cai-cv.org.

Brief Biography

During his corporate career, Cal worked for the largest health insurance and banking companies in the nation. He has worked for six CEDs and served as the Assistant to the President of Bank of America and the Chairman of WellPoint. He headed up WellPoint’s public relations and social responsibility programs. Cal also served as Executive Director of WellPoint’s corporate foundations, responsible for bolstering their relationships with hospitals and physicians. Cal managed grassroots lobbying for WellPoint, developing the largest grassroots network in the healthcare industry. At Bank of America, he headed up public relations for the Los Angeles headquarters and then went to San Francisco to manage their State Policy Development Department. Later, he served as Bank of America’s Chief Lobbyist in Sacramento. He has worked for the California Legislature and on budget related issues with the office of Governor Brown.

Cal’s association experience includes serving on the Board and as President of two homeowners associations, and serving as President and Executive Director of the Association of Corporate Contributions Professionals (ACCP). ACCP is a national professional association representing one hundred fifty of the country’s largest corporate giving programs. Through ACCP, Cal helped member companies educate foundation employees to ensure compliance to complicated regulations, while maximizing their impact in their communities. During his corporate career, he chaired numerous nonprofit professional, trade, and civic organizations.

Most recently, Cal has been consulting with nonprofits and small businesses, and helping to manage a family business in the Coachella Valley. He resides in Indio, CA, with his wife, Carrie, and their four sons.

Christina Baine DeJardin, Esq.
CAI-CV Past Presidents’ Memories

I was a special honor to compile the comments below from many of our Past Presidents. Reading their stories certainly brought back a flood of memories for me. I’ve been a member of CAI-CV since the early 80s, and have enjoyed participating and sharing with my chapter friends in countless events and fundraisers. My special thanks to the Past Presidents who participated. We will have much to discuss at the next Past Presidents’ dinner. Or as I would say——we’ll talk!

1981 Gary Wiedle:
I was on the first Board of Directors for the CAI Coachella Valley Chapter in the late seventies. The main organizer of the chapter was Dave Meinke, who later owned and operated Frontrow Management in Palm Desert. In the early days the chapter was almost singularly dedicated to educational purposes involving presentations, discussion groups and providing information (publications) about management issues for HOA Board members and managers. The chapter meetings were three or four times per year and in the late afternoons and usually wine and cheese affairs at a mid-valley country club. Although vendors and colleagues (accountants, insurance professionals) were invited and welcome, the main attendance was by association board members and managers. The chapter grew and then one year, I think that it was the early to mid-eighties, we sponsored a Trade Show and held it at the Palm Desert Board of Realtors office. The Trade Show was a big success and that is when vendors saw the benefits of networking and then the chapter started to take on a new dimension that was a whole lot more social and event oriented as opposed to a primary educational purpose. It is all good and the chapter has prospered and the service to Coachella Valley homeowners in common interest developments has been great.

1982 Bob Tuvell:
I was a founding director in in the late seventies. The only memory I have is of the frustration of not being able to get more than about 45 members for several years.

1986 Melissa Layton:
When I served we were a very young chapter with very few members. I know we spent most of our time trying to figure out how to bring others in. One thing that really stands out to me (about those early days) was that we held a first Roundtable event with great guest speakers at Ironwood. It was the first of its kind and though there was a small attendance by today’s standards, it was really a success. I don’t remember though if it was under our term as President or I just helped with it. Sorry - it’s been quite a few years since then.

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Board Meeting, and having to stop a membership meeting at a restaurant because of the roof leaking on us during a rainstorm. We were a pretty small chapter then and everyone pitched in and helped with all the activities.

1994 Kay Ladner: My most memorable was our first Day at the Races, Terry O’Brien’s betting tips and then watching him accidentally tear up a winning ticket! I also recall vividly handing the gavel over to Gary Butler, who was wearing a diaper. Building the chapter with harmony was my goal and I believe it was accomplished.

1995 Gary Butler: The mission of my term was to entertain as well as educate our audience. Who else started their term dressed in a diaper? I believe that if people are willing to make the effort to show up that early in the morning, they deserve to start their day with a good laugh as well as a good meal. We had our only little drama team that did something stupid after working all day (we might be seeing that happen again in the very near future).

1996 Carol Fulton: As I look back I have several moments during my presidency that I think were memorable. We helped with building a home through Habitat for Humanity for a family in 1996! Carol Fulton:

1997 Peggy Redmon: Crazy bus trips to Del Mar, dancing with friends at Awards Nights, insanity at conferences/the plane that almost collided with another plane at landing, experiencing DC - just being with a lot of folks who were enjoying life, helping each other with our lives/career and not trying to create a resume!!!

1999 Doug Robinson: To have a successful presidency you have to have the following: A good board, strong committee chairs & an experienced Executive Director. I was fortunate to have all three! We accomplished a lot and had a great time.

2000 Mary Walker: The year was 2000. We had just all gone through numerous Y2K classes and made sure that all computer programs were protected. Amazing but we sailed through.

2001 Steven Shuey: I was president during 2001; this was the year following the Y2K year and the energy that year brought with it. People were winding down from the new millennium and life was getting back to normal. One memory that comes to mind was how I was grousing prior to my presidency, wondering why the presidents of prior years made claims of getting all the complaints from members, and then, as if by surprise, during my year as president, I was the one getting them. I remember wondering why folks focused on the negative rather than the positive in life. I remember placing positive “motivational moments” on the breakfast tables each month in the hope that people would see the blessing we all live in. I’m not sure I ever found out if that did any good, but I sure feel like I had a good year as president under Terry O’Brien, our then CED.

2009 Cyndi Koester: I had the honor as serving as Chapter President in 2009. This was the year of change for the Coachella Valley Chapter. The organization was ready to move forward in growing and expanding its market. We went through great experiences with setting new policies and procedures along with setting new goals for the chapter. We came into the 21st Century with our website and started taking online registration and online payments! In addition, we added a wonderful fun family night event the Annual Bowling Tournament! We also re-established the Business Partner Committee along with getting back involved with CAI-CLAC as an active participant.

One of our most exciting changes for the year was to make the Quorum Magazine full color along with the Membership Directory. The main goal for the Chapter in 2009 was to keep the new goals set by the board and to keep looking for more benefits to our members. I had the privilege of working with a great board of directors and CED that had the same goals for the chapter. It was truly an honor to serve the Chapter as the President.
2010 Gloria Kirkwood:
My personal purpose for serving as president in 2010 was to give back to a chapter that I felt had served me well over the years. Through CAI I have made friends and worked with professionals that were dedicated and helpful in the overall success and growth of the Chapter. As I mentioned throughout my term as President, the support of our business partners was and continues to be integral to our overall success and growth of the Chapter. As I mentioned throughout my term as President, the support of our business partners was and continues to be integral to our overall success and growth of the Chapter. As I mentioned throughout my term as President, the support of our business partners was and continues to be integral to our overall success and growth of the Chapter. As I mentioned throughout my term as President, the support of our business partners was and continues to be integral to our overall success and growth of the Chapter. As I mentioned throughout my term as President, the support of our business partners was and continues to be integral to our overall success and growth of the Chapter.

2011 Art Coulter:
I was fortunate enough to attend the National conference in Las Vegas and the next year in Boca Raton. Very impressive program and speakers. Also had the privilege of help from National in doing our strategic planning. Believe I had the opportunity to hire a new ED and also the new assistant. In my term we struggled with the financials, couldn’t master Quick Books.

2012: Rob Winkle:
I have given much thought to the term in which I served as President. So many of the names on this list created something very special. I am still amazed how many of the Past Presidents are still heavily involved in the chapter. When elected to the position I was terrified of disappointment. It was a great fundraiser, and “Hurricane,” our sponsored a real bull for our Cow Pie Bingo, which did not disappoint!)

Through CAI I have made friends and worked with professionals that were dedicated and helpful in the overall success and growth of the Chapter.

In fact, during my time as president, members from all these groups were active and contributory and allowed us to bring a new social event to the table, the Country Western Round-Up, which was held at the Sunshine Landscape “OK Corral.” This event that was a bit different, and provided an opportunity for members to kick up their heels, relax by an open fire, and, like so many of our other events, a marvelous way to get to know chapter members. It was well attended, entertaining, and successful – we even had a dozen of “giving something back” to the chapter that has done so much for us at Western Pacific. In reality I gained more both personally and professionally from being part of the board and being surrounded by so such dedicated successful individuals than I could ever “give back.” Thanks again to all the names on this list.

Jerald (Jerry) Cavoretto is a Senior Community Association Manager with Desert Resort Management. He has managed HOAs for over thirty six years in both the Coachella Valley and Orange County. Jerry can be reached at (760) 346-1161 or jcavoretto@drmininet.com
Condominiums were first regulated in California in 1963 by passage of the California Condominium Act. In 1985, the laws governing common interest developments were revised and expanded in 1985 by passage of the Davis-Stirling Common Interest Development Act ("Act") which was named after the two assemblymen who sponsored the bill, Gray Davis and Larry Stirling. According to Continuing Education of the Bar’s Advising California Common Interest Communities authored by Curtis C. Sproul and Katharine N. Rosenberry, the Act was the product of the efforts of a Select Assembly Committee. The committee’s four primary purposes were:

1. To consolidate statutory provisions governing common interest developments;
2. To standardize treatment of different types of common interest developments;
3. To validate existing practices of developers and community associations; and
4. To resolve problems faced by homeowners and associations in the operation of common interest developments, particularly the collection of assessments and amendments of governing documents.

Some Interesting Tidbits – Pre-2014:

- In 1985 when first adopted, the Act contained 23 statutes - Civil Code Sections 1350 - 1372. There were no sub-numbered sections.
- In 2013, the Act contained 92 statutes – quadruple the original number!
- New Act effective January 1, 2014 has over 200 code sections.
- The section that was amended the most is Civil Code Section 1365 (Documents Prepared and Distributed by Associations) - 13 times since its adoption in 1985. Other front runners include section 1363 (Community Association Management; Schedule of Monetary Penalties for Violations) with 10 amendments since 1985 and section 1365.5 (Board of Directors; Duties) with 8 amendments since its adoption in 1986.
- Of the original 23 statutes, only 11 were never amended.
- Only one year, legislative session 1998, resulted in no amendments being made to the Act.
- The legislative session of 2002 was the most prolific, resulting in 8 statutes amended and 21 statutes added to the Act. Close behind is 2002 and 2005 with 15 amendments each and/or additions each.

The following is a timeline of the Act prior to 2014. Significant amendments are briefly highlighted.

1987
- 1365.5 Added - Board of Directors Duties
- 1366.1 Added - Imposing an assessment can not exceed the amount to defray the costs for which it is levied

1988
- 1366 - Amended - Made it clear that this section would take precedence over more restrictive limitations in governing documents. Changed the amount the board can increase regular assessments without a vote from 10% of the prior year’s assessment to 20%. Also defined the emergency circumstances for which the limitations on increasing assessments may be exceeded.
- 1368 - Amended to prohibit transfer fees

1989
- 1355 - Added - Amendment procedures to documents that do not have amendment procedures
- 1365.7 - Added - Exemption for directors liability and insurance minimums for associations to carry to protect directors from liability
- 1373 - Added - Excludes certain provisions of the Act from applying to commercial/industrial common interest developments

1990
- Minor amendments to 1351 and 1393

1991
- 1354 - Amended to include that in an action to enforce a declaration, the prevailing party will be awarded attorneys fees and costs.
- 1363.2 Added - Addresses manager’s obligation with regard to depositing funds received by an association.
- 1366 - Amended to require that board prepare and distribute a budget prior to increasing assessments.

1992
- 1363 - Amended to indicate that an association may exercise the powers of nonprofit mutual benefit corporations, whether incorporated or not. Also requires membership meetings to be conducted using parliamentary procedures.
• 1365.5 - Amended to include Alternatives to the express language of actions to which associations have standing which was included in the 1992 amendment.

1995
• 1363.5 - Amended - required Articles of Incorporation filed after 1/1/95 to include a statement identifying the corporation as an association formed to manage a common interest development and to include the business office of the association.

1996
• 1363 - Amended - Deleted portions which addressed meetings and moved to new 1363.05.
• 1363.05 - Added - Open Meeting Act

1997
• 1363.05 - Added requirement that owners can speak at membership meetings, except executive sessions, with the board able to place reasonable time limits on speaking.

1999
• 1363 - Amended to indicate that all relevant information, including insurance information, is included. Unless amended, this section will become inoperative on 7/1/2010 and repealed 1/1/2011.

2001
• 1360.5 - Added - Places restrictions on the ability of associations to prohibit pets in their governing documents. The new section requires that owners be allowed to keep a minimum of one (1) pet within a project, subject to reasonable rules and regulations.

2003
• 1353 - Amended to require that CC&Rs include a disclaimer if the project is in the vicinity of an airport.
• 1353.5 - Added - Addresses the display of the United StatesFlag

2004
• 1366 - Amended to add exemption from judgment creditors assessments collected by associations for essential services.

2005
• 1366 - Amended to require sellers of homes within an association must disclose to prospective purchasers unpaid monetary fines and provide a “copy or summary” of any disciplinary notice for any unresolved alleged violations of the governing documents.

2006
• 1366.5 - Minor amendment
• 1375 - Modifies the construction defect notification statute to apply to subcontractors, design professionals, etc., so they may participate in alternative dispute resolution. Also clarifies the information to be exchanged to ensure that all relevant information, including insurance information, is included. Unless amended, this section will become inoperative on 7/1/2010 and repealed 1/1/2011.

2011
• 1365 - Amended to require that a statement describing the association’s policies and practices in enforcing lien rights or other legal remedies for default in payment of assessments and a summary of the association’s fidelity insurance be distributed to the members within sixty days preceding the start of the association’s fiscal year.
• 1365.1 - Added - Adds to the list of documents associations are required to distribute annually to the membership to include a “Notice” generally disclosing the owners’ rights with respect to collection of assessments.

2012
• 1366 - Amended - Limits associations to the express language of their CC&Rs, if any, with respect to determining when an assessment is deemed late, and what annual percentage interest rate may be charged on delinquent amounts due.

2013
• 1367 - Added - Requires that all community associations provide...
at least thirty (30) days written notice to a delinquent owner prior to recording an assessment lien and adds to the required language which must be included in a “Pay of Lien.” Also created the right of a delinquent owner to request a meeting with the board to discuss curing the owner’s delinquency through a payment plan. If requested, the board is required to meet with the owner within certain time frames.

- **2004**
  - **1368 - Amended** - Regarding community service organizations
  - **1368.4 - Added** - In construction defect litigation, comparative fault may be used.
  - **1369.510 - 1369.590 - Added** - Expands Alternative Dispute Resolution proceedings.
  - **1378 - Added** - Procedures to review architectural applications

- **2005**
  - **1353 - Amended** - To include that developments within the jurisdiction of the San Francisco Bay Conservation and Development must disclose this fact in any new CC&Rs.
  - **1353.2 - Added** - Prevents associations from requiring owners to install or repair roofs in violation of Health and Safety Code section.
  - **1354 - Amended** - Complete reworking of Alternative Dispute Resolution proceedings.
  - **1357.120 - Amended** - To include changes to procedures for review of architectural improvements are governed by the “operating rules” provisions.
  - **1363.810 - 1363.850 - Added** - Requires internal dispute resolution
  - **1365 - Amended** - Prior statute was repealed and replaced in 2005, effective 7/1/06

- **2006**
  - **1357.120 - Amended** - Includes election procedures in the list of what constitutes an “operating rule.”
  - **1363.001 - Added** - Requires development of on-line education course for boards, if funds are available.
  - **1363.05 - Added** - Election/Secret Ballot Procedures
  - **1363.04 - Added** - Use of association funds for campaign purposes
  - **1363.07 - Added** - Requires 67% approval of members to grant exclusive use of common area to an owner, unless documents specify different percentage.
  - **1363.09 - Added** - Members may bring civil action for violation of election procedures, rules adoption.
  - **1365.1 - Amended** - Must add Reserves to the list of documents a seller is required to provide to prospective purchasers.

- **2007**
  - **1363.03 - Amended** - Complete rework to the CC&Rs.
  - **1363.05 - Amended** - Executive sessions to be closed to the public.
  - **1363.005 - Added** - Requires the board to provide a summary of the new reserve funding plan be distributed to members commencing January 1, 2009
  - **1365.2 - Amended** - Requires the summary of the new reserve funding plan be distributed to members commencing January 1, 2009

- **2008**
  - **1363.05 - Amended** - Requires the adoption of a reserve funding plan every three years.
  - **1365.6 - Added** - Expands disclosure requirements regarding conflicts of interests between an association and one of its directors

- **2009**
  - **1365.4 - Added** - Requires associations to wait one year or until delinquent assessment amount is $1,800 before foreclosing.
  - **1367.5 - Added** - Requires liens recorded in error be released and charges reversed.

- **2010**
  - **1363.005 - Added** - List of documents required to be distributed to the association’s directors

- **2011**
  - **1363.9 - Added** - Electric vehicle charging stations
  - **1363.05 - Amended** - Executive session meetings must be noticed (2 days); prohibits boards from taking action on any item of business outside of a meeting (including e-mail); no action by unanimous written consent unless emergency action

- **2012**
  - **1367.1 - Amended** - Voids any rule of regulation that arbitrarily or unreasonably restricts an owner’s ability to market his or her property and prohibits an association from adopting, enforcing or imposing a rule or regulation that: (i) imposes an assessment fee or fee in connection with the marketing of an owner’s property interest in excess of the association’s actual or direct costs; and (ii) establishes an exclusive relationship with a real estate broker through which the sale or marketing to the property is required to occur.

- **2013**
  - **1365.1 - Amended** - Must add information to annual disclosure about payments under protest for delinquent assessments in amounts not exceeding small claims court jurisdiction.
  - **1365.6 - Added** - Dispute resolution for delinquent assessments

- **2014**
  - **1367.5 - Added** - Requires liens to be released and charges reversed.
  - **1367.4 - Added** - Requires associations to wait one year or until delinquent assessment amount is $1,800 before foreclosing.
  - **1367.3 - Added** - Requires liens recorded in error be released and charges reversed.
  - **1367.2 - Added** - Must add information to annual disclosure about payments under protest for delinquent assessments in amounts not exceeding small claims court jurisdiction.
  - **1365.6 - Added** - Dispute resolution for delinquent assessments

Laurie S. Poole, Esq., CCAL has been an attorney with Peters & Freedman, L.L.P. since 1993 and can be reached at (760) 773-4463 or lpoole@hoalaw.com.

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Terry O’Brien—A Fond Remembrance

By Margaret “Gen” Wangler, Esq., CCAL

Terry O’Brien was a true inspiration from the early days of our Chapter, and helped to set the tone of the Chapter as fun, friendly and close. Also known as “His Eminence,” Terry served as Chapter Executive Director through most of the nineties until the early 2000’s. Terry was devoted to the Chapter and its members; he practically lived at the office, knew everyone and was on top of everything.

Terry was a very accomplished and well educated person. He had a very successful business career before “retiring” and becoming our CEO, including work in advertising, ownership of an aviation flight school, ownership of a computer company in St. Thomas, U.S. Virgin Islands, and investment management in Minnesota and Palm Springs. Terry was also devoted to the arts and sciences, and served for many years on the board of the Hazelden Foundation, a recovery center in Minnesota. He was a true intelectual, but of course could talk to anyone. And did.

Like any true Irishman, Terry loved horses, and was an accomplished rider. He organized a Chapter function at a local stable one year that included riding demonstrations. It was very successful, and something we had never done before.

Terry was instrumental in organizing the first Del Mar Day at the Races. On the bus rides down, he would share his “expertise” on how to pick the winning horse in each race. Talk about Irish blarney!

My favorite memories of Terry, though, are from his support for the Chapter’s softball team. We had a co-ed team during the 90’s. We first called ourselves the “Twits.” Later, when we actually learned to how to play and win games, we became the “Eagles.” It was a lot of fun, and I don’t think Terry missed a game. He yelled and cheered so much that the refs came close to kicking him out of the park a couple of times.

Terry was a good friend. When you shared a joke with him, you felt like only the two of you got it. I still miss him, and know a lot of our long time members do too.

Margaret G. “Gen” Wangler, Esq., CCAL, is a senior shareholder of Fiore Racobs & Powers, which devotes its practice to the representation of community associations. She can be reached at gwangler@fiorelaw.com or 760-776-6511.
Quorum
1983 - 2013

Chapter Directory
1992 - 2013
Through The Years
Through the years

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THROUGH THE YEARS

[Images of people from different years]
Very special thanks to Mary Walker, year 2000 Past President, for her help in assembling these photos, and thanks to Carol Whitlock for her years as Chapter historian.
CAI...It’s National!

By Crystal L. Wallace, IOM, CAE, Vice President, Membership & Chapter Relations, Community Associations Institute

It’s 2014 and with more than 33,000 members, CAI is sixty chapters strong (including Coachella Valley), with one international partnership in South Africa. Many of you readers may look at CAI and only think of the Coachella Valley, and the programs that chapter offers, or perhaps the programming offered by other California chapters. Some of you may have attended an Annual Conference and have met people from other chapters and even other countries. From a national perspective, let me share how CAI and the Coachella Valley chapter got started.

CAI was founded in September 1973 in Washington, DC by individuals who saw a future in a relatively new housing model called community associations or common-interest developments. The founder’s vision was to create an organization to bring together all the stakeholders, including community association volunteers, community managers and the many product and service providers assisting community associations. Their mission was, and still is, to provide education and advocacy for those living and working in community associations.

As the community association housing model continued to develop, interest in providing education and advocacy also grew, which led to regional, state and local chapters. In 1981, the Coachella Valley became one of twenty domiciled chapters incorporated at the time. For the past thirty years, the Coachella Valley chapter has grown to more than five hundred members, providing educational programming for managers and community volunteers and networking opportunities for business partners.

Additionally, the chapter works with the seven other California chapters to support a statewide Legislative Action Committee (CLAC) and host a statewide Legal Forum each October.

As successful as Coachella Valley and all CAI chapters are today, establishing a CAI chapter is no “easy feat.” It takes a substantial level of commitment requiring those involved in the organizing committee to be dedicated and passionate about serving all stakeholders in community associations. In order to begin the process of chapter formation, several criteria must be met. Organizing committee members must be able to demonstrate market potential including statistical information of community development and professional and industry interest. They must also be able to identify fifty current CAI members in a central geographic area. Once those criteria are met, CAI’s Board of Trustees reviews the request and determines if a chapter may be created.

During the first two years of organization, CAI staff from the international office, as well as international trustees, work with local volunteers to create a viable chapter that meets all of CAI’s requirements for active chapters. To assist an organizing chapter in accomplishing this goal, CAI provides guidance and some administrative support. However, the majority of the work is done by local volunteers, who are required to accomplish many things in the first two years, including incorporating in the state, developing bylaws, creating a budget, recruiting members, planning educational events and chapter newsletters. Many of these same functions continue today, but getting started for the first time takes a great deal of commitment from those first volunteers.

The success of the partnership between CAI and its chapters relies upon the strengths of both the international organization and its chapters. In order to be successful, the willingness to collaborate and cooperate, mutual respect and consistent, concise communication are necessary of both the chapter and international office. While each chapter is incorporated separately, CAI provides guidelines and minimum requirements for the chapter to maintain its CAI chapter status. The guidelines and requirements include the makeup of the chapter board of directors, chapter bylaws, committee structure, education programs and marketing and resource materials. Additionally, chapters are provided with monthly membership reports and rebates from the dues collected from those members in their chapter.

It has taken a lot of volunteer time, resources and financial commitment of volunteers to get the Coachella Valley chapter where it is today. The international office, the Coachella Valley chapter, as well as the other California chapters enjoy a respectful, collaborative relationship today - thanks to many of you! I personally, have been fortunate to work closely with many of the volunteers in your chapter and see it prosper. Is there still room to grow and work to be done? Yes, there always will be! CAI looks forward to many more years in the Coachella Valley!

Crystal Wallace has served as the Vice President, Membership and Chapter Relations for the Community Associations Institute since August 2007. Her responsibilities include membership recruitment and retention, chapter leadership training and development and providing strategic direction to the chapter relations and member services departments. She can be reached at (888) 224-4321.

The founder’s vision was to create an organization to bring together all the stakeholders, including community association volunteers, community managers and the many product and service providers assisting community associations.
The Times They Are [Not Always] A-Changin…

Five homeowner association cases from the 1980s which are still good law today...

By Gary Kessler, Esq.

much has changed during the three decades since CAI’s Coachella Valley chapter was formed in the early 1980s. For example, the once omnipresent Sony Walkman of the 1980s are nowhere to be found — replaced in the 21st Century by the now omnipresent smartphone. And during the 1980s the Los Angeles Angels played their spring training games at home in the Palm Springs desert — while currently their spring training base is in the Arizona desert.

But at least two things have not changed since the 80s. Jerry Brown was California’s Governor in the early 1980s: Thirty years later, he is again (albeit with a somewhat lengthy hiatus) our Governor. And five published California cases from the 1980’s dealing with homeowner association duties: Thirty years later, these five cases were decided in the 1980’s...
History of water district is tied to responsible water management

By Jim Barrett, General Manager, Coachella Valley Water District

The district was formed in 1918 with the purpose of protecting the Coachella Valley’s water supply for generations to come. Two of the agency’s first actions were to build replenishment facilities at Whitewater to capture natural runoff from nearby mountains for groundwater replenishment and investigate the possibility of a canal to bring Colorado River water to the valley.

Construction is completed on the Mission Creek Groundwater Replenishment facility to replenish the sub-basins in the area with imported supply.

2009: CVWD opens the Valley’s third full-scale replenishment facility in south La Quinta with a capacity of replenishing 40,000 acre-feet annually.

2010: The Coachella Valley Water Management Plan Update is published to reflect increased water needs of the growing population.

2013: CVWD Board approves design/engineering for an expansion of the Coachella Canal distribution system, which will allow more farmers to convert to Colorado River water and save approximately 30,000 acre-feet of groundwater annually.

2013: CVWD and DWA complete Whitewater Groundwater Replenishment Improvement Project to increase facility’s capacity by 100 cubic feet per second or 66 million gallons per day.

The district remains committed to its role as a responsible steward of our most precious resource. You can be certain that this rich tradition will continue far into the future.

Jim Barrett is the General Manager of the Coachella Valley Water District. He can be reached at jim@cvwd.org or (760) 398-2631.
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WHEN: Friday, September 12th
Registration opens at 11:30 am
WHERE: Palm Valley Country Club

SAVE THE DATES
OCTOBER 17: CAI Legal Forum, San Diego
NOVEMBER 14: Luncheon Program, 11:30 am

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