

COMMUNITY ASSOCIATION OF THE YEAR CONTEST

SECTION A: PART I – QUESTIONNAIRE

GOVERNANCE

In applying for Community Association of the Year, it is assumed that your community follows CAI's Best Practices, Federal, State and local laws and regulations, and adheres to the following:

- A functioning board that meets regularly to carry out its duties and responsibilities as prescribed by applicable law and the governing documents.
- The board discloses to the owners the association information required by law and the governing documents.
- The association's legal documents, resolutions, books and records are kept in a location that is open to inspection by owners on reasonable notice and during regular business hours.
- Owners may attend board meetings, except when the board meets in executive session.
- The board provides for due process (the opportunity to be heard) for owners in associated-related matters.
- There exists a mechanism and procedure for assuring residents' obligations to adhere to the governing documents and a confidential and safe forum for the resolution of disputes.
- The board, when conducting association business, acts ethically and avoids actual or perceived conflicts of interest.
- The association requires all service providers to be licensed and insured within the jurisdiction of operation.

1. Does the board follow a form of parliamentary procedure when conducting the business meeting? **Yes/No (3 points maximum)**
2. Does the meeting agenda include time for an owners/residents forum? **Yes/No (3 points maximum)**
3. Does the board distribute proposals for new rules and guidelines to all homeowners and encourage input? **Yes/No (3 points maximum)**
4. Does the board budget for ongoing education of members of the board? **Yes/No (3 points maximum)**
5. Is the board business meeting agenda and report available to the owners and residents prior to the meeting? If so, describe how it is made available. **Yes/No (50 words or less) (12 points maximum)**
6. Does the board produce minutes of the regular meetings and the annual owners' meeting as required by applicable law and the governing documents? How are the minutes made available to owners? **Yes/No (50 words or less) (12 points maximum)**
7. Does the board hold Executive Sessions? If so, for what purpose are sessions generally held? **Yes/No (50 words or less) (12 points maximum)**
8. Does the board approve motions or decisions between or outside of meetings? If yes, how are these recorded? **Yes/No (50 words or less) (12 points maximum)**
9. Does the board encourage the use of alternative dispute resolution (other than hearings) in appropriate matters? What steps do you take to resolve conflict before initiating formal due process? Please provide an example. **Yes/No (250 words or less) (30 points maximum)**
10. Which of the categories does the association follow as part of the CAI Community Association Governance Guidelines? (Check all that apply) **(3 points maximum)**

<input type="checkbox"/> Annual Meeting	<input type="checkbox"/> Elections	<input type="checkbox"/> Grievances and appeals
<input type="checkbox"/> Assessments	<input type="checkbox"/> Financial transparency	<input type="checkbox"/> Records
<input type="checkbox"/> Communication	<input type="checkbox"/> Foreclosure	<input type="checkbox"/> Reserve funding
<input type="checkbox"/> Conflicts of interest	<input type="checkbox"/> Governance and law	<input type="checkbox"/> Rules

11. Which CAI and WMCCAI events did board members and other community members attend in the past year? (Check all that apply) **(3 points maximum)**

<input type="checkbox"/> WMCCAI Conference & Expo or CAI Annual Conference	<input type="checkbox"/> Jump Start January
<input type="checkbox"/> Board Leadership Development Workshop	<input type="checkbox"/> Homeowner Education
<input type="checkbox"/> Networking/Social Events	<input type="checkbox"/> Community Service

COMMUNICATION

12. Which of the following methods does the association use to keep residents and owners informed of board decisions, day-to-day operations, upcoming special events and emergencies? (Check all that apply) **(3 points maximum)**

<input type="checkbox"/> Bulletin boards	<input type="checkbox"/> Social media	<input type="checkbox"/> Other, please explain:
<input type="checkbox"/> E-mail blasts	<input type="checkbox"/> Telephone tree	
<input type="checkbox"/> Newsletters	<input type="checkbox"/> Website	

13. Does the association conduct social events as a way of building community harmony? Aside from social events, what else do you do for community building? **Yes/No (50 words or less) (12 points maximum)**

14. Does the board conduct town hall meetings? When was the last one, and what issue did it cover? **Yes/No (50 words or less) (12 points maximum)**

15. Does the board communicate, other than required by law, to provide information concerning the association and to get feedback from owners? If yes, please describe. **Yes/No (100 words or less) (21 points maximum)**

16. Does the association use all the communication methods at its disposal to solicit and praise volunteers? Please explain. **Yes/No (100 words or less) (21 points maximum)**

17. Does the board solicit the community for ideas and suggestions? Please provide an example of how you collect suggestions from homeowners. **Yes/No (100 words or less) (21 points maximum)**

18. Does the board inform owners and residents of the roles and responsibilities of the board, committees, owners and residents other than providing governing documents to every homeowner? If yes, what other ways does your board of directors communicate to the homeowner? **Yes/No (100 words or less) (21 points maximum)**

FACILITY MANAGEMENT

19. Does the board maintain a list of the association's common real property? **Yes/No (3 points maximum)**

20. Do the association's policies require multiple bids for the purchase of products and/or services? **Yes/No (3 points maximum)**

21. Does the board develop and maintain emergency plans (e.g., snow, flood, fire, wind, etc.)? **Yes/No (3 points maximum)**

22. Does the association use CAI Business Partner (vendor) members? If yes, please provide 3 CAI member company names (excluding management companies). (May be verified) **Yes/No (3 points maximum)**

23. Please select how the board identifies assets maintenance needs. (Check all that apply) **(3 points maximum)**

<input type="checkbox"/> Physical inspection of the property	<input type="checkbox"/> Interviews
<input type="checkbox"/> Examination of available building plans & specifications	<input type="checkbox"/> Review of product or equipment information from manufacturers
<input type="checkbox"/> Review of reserve studies	

- 24. When was your last reserve study finalized (5 years or less)? **(50 words or less) (12 points maximum)**
- 25. What percent of your total budget is your annual replacement reserve contribution (current fiscal year)? Do you fund your reserves per reserve study? If not, why? **(50 words or less) (9 points maximum)**
- 26. What criterion is used to determine when a product and/or service is put out to bid? **(100 words or less) (18 points maximum)**
- 27. Does your community provide a detailed RFP when going out to bid? Please explain and include one vendor as an example. **Yes/No (100 words or less) (21 points maximum)**
- 28. Are controls created for ensuring contracted work is completed in accordance with the contract? Please explain. **Yes/No (100 words or less) (21 points maximum)**
- 29. Describe the system that your association has in place to respond to owner's requests for association maintenance and other association-related matters. **(200 words or less) (27 points maximum)**
- 30. Describe your system for property inspections, both for the common areas and for unit owners. **(200 words or less) (27 points maximum)**
- 31. Describe your system for monitoring to ensure proper maintenance and appearance, both current and preventative. **(200 words or less) (27 points maximum)**
- 32. Other than basic recycling practices (blue recycling bins), describe all environmentally sustainable practices supported by the Association. Do you encourage your residents to be more "green" too? If so, how? **Yes/No (200 words or less) (30 points maximum)**

FINANCIAL MANAGEMENT

- 33. Does the association maintain financial records in accordance with Generally Accepted Accounting Principles (GAAP)? **Yes/No (3 points maximum)**
- 34. Does an independent third party (certified public accountant) conduct an annual audit or annual review of the association's financial condition? If yes, when was the last one, and who completed it? **Yes/No (50 words or less) (12 points maximum)**
- 35. Has the board established financial management controls? Please provide three examples. **Yes/No (50 words or less) (12 points maximum)**

RISK CONTROL & INSURANCE

- 36. Does the association carry insurance coverage in keeping with the size of, and risk to, the association? **Yes/No (3 points maximum)**
- 37. Do you carry a crime/fidelity insurance policy? **Yes/No (3 points maximum)**
- 38. Which of the following does the association use to identify exposure to loss: (Check all that apply) **(3 points maximum)**

<input type="checkbox"/> Conduct surveys	<input type="checkbox"/> Makes personal inspections
<input type="checkbox"/> Reads records and files	<input type="checkbox"/> Hires experts (i.e. reserve specialists)
<input type="checkbox"/> Examines financial statements including audits and reviews	

- 39. What has your association done to reduce hazards within the community? **(250 words or less) (27 points maximum)**

ASSOCIATION LEADERSHIP & MANAGEMENT

40. Is the community professionally managed? If yes, does the management company hold the AAMC designation or hold appropriate credentials evidencing its competence to manage the community? When were they received and by what means? **Yes/No (50 words or less) (12 points maximum)**
41. Do you have a manager? If yes, does the manager hold a CAI designation (CMCA, AMS, LSM, PCAM)? When were the designations received? **Yes/No (50 words or less) (12 points maximum)**
42. Did a representative of the association attend any of the following in the last 12 months? (Check all that apply) **(6 points maximum)**

	Manager	CAVL/Homeowner	Onsite Staff
CAI Professional Management Development Program (PMDP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CAI National Conference	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WMCCAI Conference & Expo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WMCCAI educational programs/events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teach or facilitate CAI educational events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contributes to <i>Quorum</i> magazine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contributes to <i>Common Ground</i> magazine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Service Programs (Potomac Watershed or Ronald McDonald House Landscaping Day)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION A: PART II – ESSAY

(PLEASE SEE OVERVIEW PAGE FOR ESSAY REQUIREMENTS)

The 500-word essay gives you an opportunity to provide a convincing argument for the selection of your community as the standard-bearer of Washington Metropolitan Chapter Community Associations Institute's Best Practices; to provide a word picture of your community operations and governance; and to convey the enthusiasm you have for the association.

As specified in the essay requirements section on the first page, the essay must:

- Be completed by a board member or other homeowner.
- The essay writer must be a current member of WMCCAI and whose signature appears below.
- The essay must be typed on a separate page, double-spaced, and include the author's name, member ID number and applicable word count at the end.
- The author's name and member ID number must be included on the essay.
- Submitting the essay as a Word document is preferred but not required.
- Loss of points will occur if the essay is not double-spaced, if a word count is not included, and if the author's name and member ID are not included on the essay.

The essay will be disqualified if the essay is over 500 words or if it is written by a manager.

COMMUNITY BOARD MEMBER OR HOMEOWNER SIGNATURE

SECTION A: PART III – SUBMITTALS

Provide one copy of your newsletter and your website address. Include a one-time use password for access to members-only areas.

WEBSITE

USER ID

PASSWORD