

# ELIZABETH LOFTS

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## WHAT SETS CMI APART?

- ◆ AAMC: The only company in Oregon to hold this designation.
- ◆ CMCA: Twelve CMI Managers have this title.
- ◆ AMS: Three CMI Managers can add this to their name.
- ◆ PCAM: Six CMI Managers have earned this designation.
- ◆ BMC Dept: Staff dedicated to implementing Building Maintenance Plans.
- ◆ 24/7: Live Voice Emergency Response
- ◆ Web site development/support

## Welcome to Community Management, Inc.

Selecting a professional management company is an important item of business for your association. We are very pleased to introduce ourselves as your accredited association management company (AAMC), selected by the Board of Directors to provide management services for your association.

Community Management, Inc., AAMC (CMI) is an Oregon corporation founded in 1972 by its owner and president, Kaye Youngren. Our firm's primary purpose is to provide management and maintenance services to homeowner associations. We work with your Association to provide a slate of services selected by your Board. Our corporate principle is "YOUR COMMUNITY - OUR COMMITMENT". Our AAMC designation assures you that our company has a staff with the experience, knowledge, skills, dedication and integrity needed to serve your association most effectively. CMI has assembled a team to provide the services as summarized below.

**COMMUNITY MANAGER**—Karina Haley has been assigned to the Elizabeth Lofts Condominium as the Community Manager. Karina has earned her CMCA (Certified Manager of Community Associations) and AMS (Association Management Specialist) designations from the National Board of Certification for Community Association Managers, and has been with CMI for over nine years. Prior to becoming a Community Manager Karina served as the Community Administrator for the Elizabeth Lofts under former Manager Tom LaVoie. Karina's background includes providing management services to high-rise condominiums, planned unit developments and she has a strong history of excellent customer service. Karina works directly with the Board to coordinate the maintenance of the common elements (*janitorial; systems; etc.*), to assist the Board in the administration of the day-to-day operations in accordance with the Declaration, Bylaws, Rules and regulations and policies as adopted by the Board (*this includes the enforcement of rules; preparation, attendance and coordination of Annual and Board Meetings; correspondence; renewal of insurance, etc.*), and fiscal administration (*collection of assessments, payment of bills, financial statements, analy-*

*sis and preparation of budget, coordination of Reserve Study and Maintenance Manual updates, filing of tax returns and audit, etc.*).

**COMMUNITY ADMINISTRATOR**—Jennifer Martin works directly with Karina to help ensure that everything runs smoothly for Elizabeth residents. Jennifer can help you with general questions concerning day-to-day condominium life, she responds to e-mails, provides assistance with maintenance issues and service requests, and any other matters that may arise. Jennifer has been with CMI for twelve years and is a valued member of the team!

**CONCIERGE STAFF**—CMI has assembled a first rate Concierge staff to provide the highest level of services for Elizabeth owners and residents. Two full time and one part time Concierges work from 7:00 am to 11:00 pm Monday through Thursday, 7:00 am to midnight on Friday, 8:00 am to midnight Saturday, and 12:00 pm to 10:00 pm Sunday. Concierge services include accepting packages, providing access to your unit for guests, etc., answering questions, reporting maintenance problems, and many other services.

**FACILITY ASSET MANAGER**—Brian Case oversees the tasks identified in the Maintenance plan prepared by RDH Building Sciences specifically for the Elizabeth Lofts. In January 2006, a statute was adopted under the Oregon Condominium Act requiring that associations have a 30- year maintenance plan that encompasses the tasks needed to maintain the physical elements of the buildings. Our Facility Asset Managers provide another level of confidence that your Association's service contracts are being fulfilled and that building systems are being maintained in accordance with your Association's Maintenance Plan.

**ON-SITE JANITORIAL SERVICE**—As with the concierge staff, two full time porters are assigned to work at the Elizabeth Lofts to provide janitorial services (*vacuuming, dusting, cleaning the trash rooms, etc.*).

**ACCOUNTING DEPARTMENT**—If you have any questions relative to the status of your monthly association fee payments, contact the CMI's corporate office.

## CMI Website

You are encouraged to visit CMI'S website: [www.communitymgmt.com](http://www.communitymgmt.com). You can use the site to request a change of address, request information regarding your HOA account, submit a service request, email any of our staff, and find answers to some of the most frequently asked questions. You will also discover items of interest relating to seminars and programs through Oregon Chapter of Community Associations Institute.

In addition, you can now request Real Estate Transaction Packets (if you are selling or planning to sell your unit, this is a packet of documents that are frequently requested by potential purchasers). Appraisers can access quick answers to their commonly asked questions, lenders can request and pay for Condominium Certification Questionnaires, and Escrow Officers can request account payment information for closing documents.



## Office Hours, Phone Calls, & Emergency Info

**Office Hours**—CMI office hours are 9:00 a.m. to 5:00 p.m. Calls received by our receptionist at our main number (503-233-0300) during office hours are routed to the appropriate person. We also offer a voice mail feature so you can leave a message for the person you wish to speak with. If you call and the person you want to speak to is not available you will have the option of leaving a personal message in a voice mailbox. Of course, you may also ask to speak to another person, who may be able to assist you, rather than leaving a message in the voice mailbox.

**Phone calls**—It is our objective to speak with you when you call, not just to return your call. If we are not available to take your call, our goal is to respond to your voicemail promptly and within 24 hours at the latest.

**Email**—Our goal is to acknowledge every email the same day, even if we

don't have all the answers to an owner's inquiry at that time.

**After Hours and Weekend Emergency Calls**— One of the services we have offered our clients for over 36 years is a 24-hour emergency response. As our client base has changed there is also a need for clients to call after hours and leave messages that are of a non-emergency nature. In order to accommodate everyone, here is what you can expect when you call our office after hours.

**Non Emergency Calls:** You will be given the option of calling again call during normal business hours, or leaving a message on our voice mail system. Please note - voice mail messages left for office staff will be returned the next business day.

**Emergency Calls:** If you call when our office is closed and your call requires an emergency response (i.e. a plumb-

ing leak, an inoperable elevator, or sewer back up), select the option for the Emergency Answering Service and you will be transferred to a live operator. The operator will ask for your name, phone number, property and nature of the emergency. Then the operator will contact the CMI staff person who is on call. The on call person will contact you usually within a few moments and will help you to figure out how the emergency is to be dealt with.

Just one request, if you are expecting a return call for emergency maintenance, please stay by your telephone and keep the line free until you receive our return call as we want to be able to attend to your concern promptly.

## Owner Information Form

Please take a moment to fill out the owner/tenant information form enclosed in this packet. Your Board of Directors and Community Manager have the responsibility to maintain records on behalf of the Association.

It is very important that we have accurate information on file in the event of an emergency. Email addresses are also helpful. They allow us to communicate with you quickly, especially when notices and reminders need to be sent to many people at the same time. It also saves the Association a lot

of money in postage and printing. If you are renting your home, make sure that you include contact information for all who live in the unit. Also, please make sure that your tenant has been provided a copy of the rules and regulations.

## FAQ'S

### HOW DO I PAY MY MONTHLY FEES BY CHECK?

You will receive a payment coupon book for your use in paying your monthly fees. To make your payment using the coupon, simply detach the coupon for the payment(s) you want to make, enclose the coupon with your check payable to **Elizabeth Lofts Condominiums Owners' Association** and place it in the envelope provided. You may also refer to the instructions at the back of the payment coupon book. When paying by check, enclosing the coupon and using the window envelope is the most efficient way for us to process your payment. Your check will be deposited into the Association's bank account on the day it is received. If you lose your payment coupon, send your check to PO Box 60092, City of Industry, CA 91716. To ensure you receive credit for the check, please write your account number on the reference line of your check, (176 + your unit number.)

If you are going to be out of town, please pre-pay your account. When you

make your payments on time, it allows the Association to meet their obligations in a timely manner.

### IS A DIRECT PAYMENT PLAN (ACH DEBITS) AVAILABLE?

Yes. If you wish to have your HOA fees debited from a designated account each month, please log into your ClickPay account and select the auto-pay option. You may also contact ClickPay directly at 1-800-533-7901 and a live representative can assist you in setting that up.

### WHEN ARE MY MONTHLY HOA FEES DUE?

Monthly HOA Fees are due on the 1st of each month and are considered late if not received in our office by the 30th of the month. The late fee policy adopted by your Board of Directors mandates that your account be assessed a \$25 late fee plus interest (prime +4%) per month in the event your payment is not received within 30 days of the due date.

### HOW DO I CONTACT CMI?

Please send correspondence to CMI at our corporate address, 2105 SE 9th Avenue, Portland, OR 97214 rather than enclosing it with your payment. While correspondence mailed to the bank with your HOA fees will eventually be forwarded to us, this can create a substantial delay, interfering with our ability to respond to your concern in a timely manner. Alternatively, you may fax correspondence to us directly at 503-233-8884 or attach it to an email.

### YOUR COMMUNITY – OUR COMMITMENT

We are truly delighted to become part of your team. We hope to meet each of you in person during the course of our partnership with your association! You are encouraged to contact us anytime to comment on our service. We will always do our best to exceed your expectations of excellence in community association management.

## What We Do

Here are some of the major roles we play in our work with your Board of Directors.

### DATA BASE MANAGEMENT

Fiscal management services will comprise much of the work we perform. With that, it is important for us to maintain the Association's database. We have enclosed an information form for you to complete at your earliest convenience. **You may mail it back to us at 2105 SE 9<sup>th</sup> Avenue, Portland, OR 97214.** If a tenant will occupy your unit, please fill out the Tenant's Information portion of this form.

### ACCOUNTS PAYABLE AND FINANCIAL STATEMENTS

CMI will prepare checks to pay your Association's expenses. We also pro-

duce a monthly financial report that will include a balance sheet, which tracks your assets, liabilities and equity, is part of the report packet along with an Income Statement and a computerized check register. This will be distributed monthly to the Board of Directors and to the owners in accordance with the policy set forth by the Board.

### OPERATING BUDGET AND RESERVE PLANNING

We work with your Finance Committee and the Board of Directors to establish the annual operating budget requirements of your common property and to incorporate the annual contribution to the reserve account into the budget as supplied to us by your reserve professional.

### OTHER FISCAL DUTIES

CMI works with your Board to coordinate the preparation of your Association's income tax returns through the Association's CPA. CMI will also assist with the renewal of the common insurance policy.

### OTHER SERVICES

In addition to collecting and depositing your monthly association fee payments, we assist your Board of Directors with a number of other functions. These include attendance of your homeowners' association meetings, preparing rules enforcement letters in accordance with your CC&R's, and a myriad of other projects the Board of Directors may require our assistance with from time to time.

## Going Green

CMI's maintenance/janitorial division is "going green". Our staff has been trained in the use of products and equipment that have been approved by the Green Building Council. We feel strongly about protecting our communal environment and this is one way we can make a difference for you and for us. CMI is a charter member of the Green Building Council.

We have invested heavily in scanning systems which gives us fingertip access

to your records. We send as many documents as possible to you via email so you will not incur unnecessary printing/ mailing and storage costs.

CMI has been recognized by the City of Portland for our corporate recycling program. We are strong advocates of recycling at our client properties. We recycle paint, florescent light tubes, and metal, in addition to all paper/ cardboard and glass products.

All discarded documents from CMI's office are deposited into secured cabinets which are picked up and shredded by a bonded vendor every week.



## Company Philosophy

**Continual Staff Education**—CMI invests heavily in the continuing education of its staff. All of our community managers have attended accounting classes at Portland Community College. These courses are valuable in training our managers to analyze client's financial reports and prepare annual budgets.

**Training**—Our staff receives on-going training on the use of the latest software programs. Our management and accounting staff currently use Microsoft Office 2016. We also use the latest version of Timberline Software's accounting program.

Full Focus is a comprehensive database that we use to log telephone calls, track letters, rules violations, architectural changes, service requests, bid requests, activities in each unit and the common areas.

## CMI Staff Contact Information

### **Karina Haley, CMCA, CCM, AMS**

Community Manager

503-445-1206

karinah@communitymgt.com

### **Jennifer Martin**

Community Administrator

503-445-1226

jenniferm@communitymgt.com

### **Brian Case**

Building Maintenance Coordinator

503-445-1233

brianc@communitymgt.com

### **Accounts Receivable**

CMI-AR@communitymgt.com

### **Lisa Strickler**

**James Cox**

**Mark Youngren**

**Patrick Burson**

CMI Service Division Supervisors

503-233-0300

### **Community Management, Inc.**

2105 SE 9th Avenue

Portland, OR 97214

Phone: 503-233-0300

Fax: 503-233-8884

Answering Service: 503-233-0300

(Before & after office hours and on weekends)

