



WESTERN OREGON CHAPTER  
**community**  
ASSOCIATIONS INSTITUTE

**2024 CA DAY AND TRADE SHOW  
RESOURCE GUIDE  
MARCH 15TH, 2024**



**sound  
cleaning**



WESTERN OREGON CHAPTER  
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# THANK YOU SPONSORS

THANK YOU TO OUR CA DAY SPONSORS!



**First Citizens  
Bank**



**INTERSTATE  
ROOFING**



CONDOMINIUMS  
HOMEOWNER ASSOCIATIONS  
DEVELOPER SERVICES

Association  
Management  
Services NW  
*A Division of TMC*



**Fire • Smoke • Water**



**SCHWINDT & Co.**  
CERTIFIED PUBLIC ACCOUNTANTS



**CLINE  
AGENCY**  
INSURANCE BROKERS



**ERS**  
Executive Roof Services



**GORES**  
CONSTRUCTION



**GT LANDSCAPE  
SOLUTIONS**

*Welcome to Reserve Studies  
& Reserve Funding*

## **March 15<sup>th</sup>, 2024 CA Day & Trade Show**

### **SCHEDULE**

**6:00:** Vendor set up - COFFEE OUT

**7:45:** Trade Show Floor Opens

**8:00:** Registration opens/breakfast is available

**9:00:** Opening Remarks

**9:30-10:45:** Class Breakout **Session #1**

**Breakout Room #1:** Reserve Studies: Management & Use After Implementation

Speakers: Karen McDonald

**Breakout Room #2:** Approaching Security & Safety in 2024

Speakers: Mark Wells & Reid Kerr

**10:45-11:15:** Trade Show Floor Open

**11:15-12:30:** Class Breakout **Session #2**

**Breakout Room #1:** Beyond the Maintenance Plan

Speakers: Justin Barnhardt

**Breakout Room #2:** Fire Suppression – Creating Safer Communities

Speakers: Kim Kosmas, Portland Fire & Rescue – Senior Public Education Officer

Kim Haughn, Tualatin Valley Fire & Rescue - Community Risk Reduction Manager

**12:00pm** - Bar opens!

**12:30 - 1:45:** Lunch/Trade Show/1st Raffle

**1:30** - Champaign Toast to **500 MEMBERS!**

**1:45-3:00:** Class Breakout **Session #3**

**Breakout Room #1:** Panel Discussion – Stump The Experts!

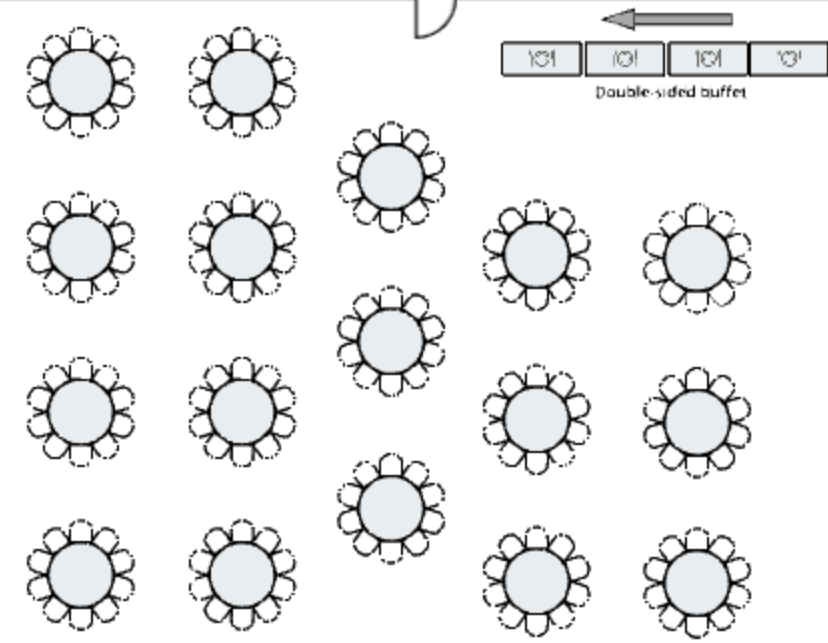
Speakers: Jason Grosz, Mike Lindor, Tim Cline, Caren Fewell

**3:00:** 2<sup>nd</sup> Raffle/Closing Remarks

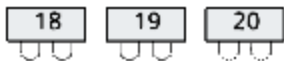
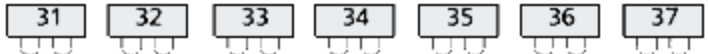
Willamette/Hood River Ballroom  
(General Session and Breakout #1)

John Day/Sandy River Ballroom

To Metolius  
(Breakout #2)



AM coffee/juice, lunch desserts  
Double sided if space permits



Coffee Station

To Rogue River  
(Bars/Sponsors)

Continental (food only)  
Double-sided

Registration





## 2024 Booth Assignments

- 1 Tatley Grund
- 2 ABI
- 3 Blue Mountain
- 4 Blue Mountain
- 5 I&E
- 6 Pacific Landscape
- 7 GreenPointe
- 8 Certa Building Solutions
- 9 CMI
- 10 Summit Reconstruction
- 11 VOTE HOA NOW
- 12 J2 Building Consultants
- 13 Alliance Association Bank
- 14 American Family
- 15 Pacific Premier Bank
- 16 PONO
- 17 WRB
- 18 AXOS Bank
- 19 Northwest Landscape Services
- 20 Charter Construction
- 21 Accurare Reserves
- 22 First Citizens Bank
- 23 Kennedy Restoration
- 24 Sound Cleaning Solutions
- 25 Evolution Architecture
- 26 Riverview Bank
- 27 Landscape East & West
- 28 NW Bank

- 29 Vial Fotheringham
- 30 Verhaalen Painting
- 31 Woodstock Construction
- 32 Rodda Paint
- 33 Brown & Brown
- 34 Columbia Bank
- 35 JR Johnson
- 36 Summit Bank
- 37 Energy Trust
- 38 Republic Services
- 39 Lift Master
- 40 Comcast
- 41 Heritage Bank
- 42 Premier Fire
- 43 Smartstreet Bank
- 44 Pacific Echelon
- 45 Rip City Painting

## **Reserve Studies: Management & Use After Implementation**

9:30am – Breakout Room #1

Presenter: Karen McDonald – Accurate Reserves

## **Karen McDonald:**

is President & Founder of Accurate Reserve Professionals, LLC. A former community manager of 15 years, Karen has spent the last 7 years helping associations bridge the gap with their reserve study. She works to prepare quality, detailed and easy to understand reserve studies to help associations better identify their current reserve funding status and develop a plan for the coming years. She is a frequent speaker and author in the industry and is highly involved with Community Associations Institute, previously serving as President of the Washington State Chapter, and is active on several committees. Education Western Washington University, Bachelors Degree Community Associations Institute M100, M201 through M206, M360, PCAM Case Study Personal Outside of the office Karen resides on a 19 acre hobby farm with her husband, dog sidekick Zeke and a collection of farm animals. In between growing a giant vegetable garden, she and her husband enjoy camping and home improvement projects.



# Reserve Studies: MANAGEMENT & USE AFTER IMPLEMENTATION



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Karen McDonald, CMCA, AMS, PCAM, RS  
President & Founder  
Accurate Reserve Professionals, LLC



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## Audience Poll



Washington



Oregon



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### Reserve Study: What Is It?

- Budget planning tool reflecting major anticipated expenditures over next 30 years
- Provides recommendations, known as funding plans, for how much to save on an annual basis in anticipation of those expenditures




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### Reserve Study: Who Needs One?

- Most communities need one
- Requirement to perform in governing docs and/or state statute
- Recommendation to perform in National Reserve Study Standards




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### Reserve Study: Picking the Right One For Your Community

- Reserve study contract considerations
  - Cost
  - Single year or multi-year engagement
  - Cancellation fee
  - Revision period
  - Meeting attendance
- Ensure RS is on staff




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### Reserve Study: Picking the Right One For Your Community, Continued

- Comparing sample studies
  - Ease of reading
  - Photos
  - Component quantities!!
  - Component historical data
  - Predictable projects included, regardless of length of useful life
  - Building envelope project costs include professional fees
  - Funding for periodic professional inspections
  - Software options for alternate scenarios




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### Reserve Study: Uses

- Indicator of association financial health
- Funding plans used in annual budget prep
- Component list used in planning projects
- Study often reviewed by:
  - Potential buyers
  - Insurance company
  - Lenders (both owner & association)




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### Reserve Study & Lending

- Fannie Mae & Freddie Mac are increasing reserve study scrutiny
- In addition to other requirements, an association may be deemed ineligible for lending if:
  - Project needs critical repairs
  - There are unfunded repairs totaling more than \$10k per unit
  - Budgeted reserve contributions do not meet minimum thresholds
    - At least 10% of budget for reserves for Fannie Mae
    - Less than 10% of budget for reserves ok for Freddie Mac if reserve study supports this



Source: <https://advocacy.caonline.org/fannie-mae-and-freddie-mac-new-lender-requirements-go-into-effect-in-september/>

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### Reviewing the Report

1. Review component list for accuracy
  - Confirm no missing components
  - Confirm study is not accidentally funding for non-association responsibility items
2. Review remaining useful lives
  - Confirm in-service dates are correct
  - Confirm projects completed have been reset
3. If building envelope investigation was performed, ensure results are incorporated
4. Verify study is using association cost history for any recently completed projects
5. Verify starting balance




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### Requesting Revisions

#### Acceptable

- Adjust starting balance
- Reset useful life for completed projects
- Adjust component cost based on actual cost history or bid received
- Extend remaining useful life of building envelope or mechanical item based on written professional opinion
- Extend remaining useful life of cosmetic item
- Remove funding for an item that governing docs have been amended to make owner responsibility (commonly windows)
- Adjust components based on results of envelope investigation

#### Typically Not Acceptable

- Remove funding for item with known predictable life (commonly siding and window walls)
- Extend remaining useful life of a building envelope or mechanical item with no documentation to substantiate request




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### Selecting a Funding Plan to Follow

Overview	
Starting Reserve Balance	\$134,090
Fully Funded Balance	\$432,602
Percent Funded	31%
Reserve Fund Strength (Weak, Fair or Strong)	Fair
Total Surplus or (Deficit) of Reserve Funding	\$(298,512)
Surplus or (Deficit) on a Per Unit Average Basis**	\$(18,657)
Current Reserve Contribution Based on Last Approved Budget	
Current Reserve Contribution Rate, Annually	\$27,075
Current Special Assessment For Reserves, Annually	N/A
Is the Current Contribution Rate Within Range Provided by Study Below? No	
Reserve Study Funding Plan Options Beginning January 1, 2025	
100% Full Funding Contribution Rate, Annually	\$33,400
70% Threshold Funding Contribution Rate, Annually	\$25,750
Baseline Funding Contribution Rate, Annually	\$27,800
Recommended Annual Special Assessment	N/A




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### 30 Year Chart: 100% Full Funding Model

Year	Current Cost	Annual Contribution	Annual Interest	Annual Expenditures	Projected Ending Reserves	Fully Funded Reserves	Percent Funded
2025	988,754	31,400	1,655		167,145	479,048	35%
2026	1,018,416	34,540	1,965	5,150	198,500	522,586	38%
2027	1,048,969	37,894	1,400	96,457	141,438	474,419	30%
2028	1,080,438	41,793	1,832		185,063	525,222	35%
2029	1,112,851	45,973	2,310		233,346	578,647	40%
2030	1,146,237	50,370	2,839		286,256	634,804	45%
2031	1,180,624	55,627	3,364	5,970	339,776	687,661	49%
2032	1,216,043	61,190	3,985	2,460	402,491	746,918	54%
2033	1,252,524	67,309	4,698		474,688	811,721	58%
2034	1,290,100	69,528	5,438		549,264	879,741	62%
2035	1,328,802	71,408	6,207		626,879	951,111	66%
2036	1,368,667	73,550	6,935	6,921	700,443	1,018,842	69%
2037	1,409,727	75,757	6,466	129,630	653,035	963,605	68%
2038	1,452,018	78,029	7,311		738,375	1,041,661	71%
2039	1,495,579	80,370	8,187		826,392	1,125,534	74%
2040	1,540,446	82,781	9,097		918,811	1,209,381	76%
2041	1,586,660	85,265	9,961	8,024	1,006,012	1,291,104	78%
2042	1,634,259	87,823	10,905	3,306	1,101,454	1,381,749	80%
2043	1,683,287	90,457	11,919		1,203,811	1,480,178	83%
2044	1,733,786	93,171	12,970		1,309,951	1,583,269	83%
2045	1,785,799	95,966	14,059		1,419,977	1,691,213	84%
2046	1,839,373	98,945	15,193	9,301	1,524,615	1,794,628	85%
2047	1,894,555	101,810	2,028	1,423,665	204,789	443,982	46%
2048	1,951,391	104,865	3,097		312,750	521,047	60%
2049	2,009,933	108,011	4,208		424,968	602,336	71%
2050	2,070,231	111,251	5,362		541,581	688,035	79%
2051	2,132,338	114,589	6,454	10,783	651,841	767,226	85%
2052	2,196,308	118,026	7,584	4,443	773,079	857,413	90%
2053	2,262,197	121,567	8,738	550,827	347,256	389,682	88%
2054	2,330,063	125,214	4,725		477,195	477,489	100%

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### 30 Year Chart: 70% Funding Model

Year	Current Cost	Annual Contribution	Annual Interest	Annual Expenditures	Projected Ending Reserves	Fully Funded Reserves	Percent Funded
2025	988,754	29,750	1,638		165,478	479,048	35%
2026	1,018,416	32,725	1,931	5,150	194,984	522,586	37%
2027	1,048,969	35,997	1,345	96,457	135,870	474,419	29%
2028	1,080,438	39,597	1,755		177,222	525,222	34%
2029	1,112,851	43,557	2,208		222,946	578,647	39%
2030	1,146,237	47,913	2,709		273,608	634,804	43%
2031	1,180,624	52,704	3,203	5,970	323,545	687,661	47%
2032	1,216,043	57,874	3,791	2,460	382,850	746,918	51%
2033	1,252,524	63,772	4,466		451,088	811,721	56%
2034	1,290,100	65,685	5,168		521,941	879,741	59%
2035	1,328,802	67,655	5,896		595,492	951,111	63%
2036	1,368,667	69,685	6,653	6,921	664,839	1,018,842	65%
2037	1,409,727	71,776	6,070	129,630	613,054	963,605	64%
2038	1,452,018	73,929	6,870		693,853	1,041,661	67%
2039	1,495,579	76,147	7,700		777,700	1,123,534	69%
2040	1,540,446	78,431	8,561		864,692	1,209,381	71%
2041	1,586,660	80,784	9,375	8,024	946,828	1,291,104	73%
2042	1,634,259	83,206	10,267	3,306	1,036,997	1,381,749	75%
2043	1,683,287	85,704	11,227		1,133,928	1,480,178	77%
2044	1,733,786	88,275	12,222		1,234,425	1,583,269	78%
2045	1,785,799	90,923	13,253		1,338,602	1,691,213	79%
2046	1,839,373	93,651	14,230	9,301	1,437,181	1,794,628	80%
2047	1,894,555	96,461	1,100	1,423,665	111,076	443,982	25%
2048	1,951,391	99,354	2,104		212,535	521,047	41%
2049	2,009,933	102,335	3,149		318,018	602,336	53%
2050	2,070,231	105,405	4,234		427,658	688,035	62%
2051	2,132,338	108,567	5,254	10,783	530,696	767,226	69%
2052	2,196,308	111,824	6,381	4,443	644,455	857,413	75%
2053	2,262,197	115,179	2,088	550,827	210,888	389,682	54%
2054	2,330,063	118,634	3,295		332,828	477,489	70%

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### 30 Year Chart: Baseline Funding Model

Year	Current Cost	Annual Contribution	Annual Interest	Annual Expenditures	Projected Ending Reserves	Fully Funded Reserves	Percent Funded
2025	988,754	27,800	1,619		163,509	479,048	34%
2026	1,018,416	30,820	1,889	5,150	190,808	522,586	37%
2027	1,048,969	33,638	1,280	96,457	129,289	474,419	27%
2028	1,080,438	37,002	1,663		167,954	525,222	32%
2029	1,112,851	40,702	2,087		210,740	578,647	36%
2030	1,146,237	44,772	2,555		258,070	634,804	41%
2031	1,180,624	49,249	3,013	5,970	304,363	687,661	44%
2032	1,216,043	54,174	3,561	2,460	359,638	746,918	48%
2033	1,252,524	59,992	4,192		423,422	811,721	52%
2034	1,290,100	61,380	4,848		489,650	879,741	56%
2035	1,328,802	63,221	5,529		558,399	951,111	59%
2036	1,368,667	65,118	6,166	6,921	622,761	1,018,842	61%
2037	1,409,727	67,071	5,602	129,630	565,804	963,605	59%
2038	1,452,018	69,083	6,349		641,236	1,041,661	62%
2039	1,495,579	71,156	7,124		715,516	1,123,534	64%
2040	1,540,446	73,290	7,928		800,734	1,209,381	66%
2041	1,586,660	75,489	8,682	8,024	876,882	1,291,104	68%
2042	1,634,259	77,754	9,513	3,306	960,848	1,381,749	70%
2043	1,683,287	80,086	10,409		1,051,339	1,480,178	71%
2044	1,733,786	82,489	11,338		1,145,166	1,583,269	72%
2045	1,785,799	84,964	12,301		1,242,431	1,691,213	73%
2046	1,839,373	87,513	13,206	9,301	1,344,608	1,794,628	74%
2047	1,894,555	90,138	3	1,423,665	325	443,982	0%
2048	1,951,391	92,842	932		94,099	521,047	18%
2049	2,009,933	95,627	1,897		191,623	602,336	32%
2050	2,070,231	98,496	2,901		293,020	688,035	43%
2051	2,132,338	101,451	3,837	10,783	387,525	767,226	51%
2052	2,196,308	104,495	4,876	4,443	492,453	857,413	57%
2053	2,262,197	107,629	4,93	550,827	49,748	389,682	49%
2054	2,330,063	110,858	1,606		162,212	477,489	34%

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**Selecting Which Projects to Perform:**

**Year 1**

- Review component list for items with 0 years remaining useful life
- Determine whether to perform these items in upcoming budget year
  - Non-building envelope items (cosmetic, landscaping, etc.) up to BOD discretion
  - For building envelope items (siding, windows, roofs, decks, etc.) obtain professional opinion
  - Prioritize safety related items
- Reserve study is a budget tool – you do not have to do a project just because it’s due in the study




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A common misconception:

“We want to perform that project but we need to wait until our reserve funding position improves.”




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**Selecting Which Projects to Perform:**

**Years 2-5**

- Review component list for **major expense** items with 1 to 4 years remaining useful life
- Perform building envelope investigation to determine exact timing and condition
  - Adjust study during revision period, or next study, based on results




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**Selecting Which Projects to Perform:  
Years 2-5, Continued**

- Major reclad projects take years to plan – start now!
  - Step one: Intrusive building envelope investigation
  - Step two: Develop scope of work and obtain costs
    - Also time to bring in the association’s attorney and lender, if obtaining a loan
  - Step four: Select vendor & negotiate contract
  - Step five: Begin project (actual timing TBD based on vendor availability and permit review periods)




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**Operating vs. Reserve Expenses**

- Annually occurring expenses are best handled through operating budget
  - Utilities
  - Insurance
  - Management
- Reserve expenses are major maintenance, repair & replacement expenses
  - Usually does not include annually occurring expenses
  - Reserve funding threshold typically 1% of annual operating budget




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**Operating vs. Reserve Expenses**

Operating Expense	Variable	Reserve Expense
• Gutter cleaning	• Irrigation repairs	• Major replacement <ul style="list-style-type: none"> <li>– Roofs</li> <li>– Windows</li> <li>– Siding</li> <li>– Decks</li> </ul>
• Window washing	• Landscape repairs	• Painting
• Minor to moderate repairs	• Tree work	• Landscape bark
• Snow removal	• Pressure washing	• Large repairs
• Landscape contract	• Fire system inspections	• Professional inspection fees
• Irrigation startup	• Elevator inspections	• Professional project management fees

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**To repair or not to repair, that is the question...**

- Always perform safety repairs immediately, even if repairs are temporary
  - Trip hazards, loose railings, etc.
- As assets age, evaluate whether repairs will extend useful life of component
  - If answer is no, consider replacement if repair needs are extensive or reoccurring




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**Maintenance Plan**

- A reserve study and a maintenance plan are technically two different documents
  - Reserve study = budget tool (i.e. how much money to save and approximately when to expect the expense)
  - Maintenance plan = detailed maintenance recommendations & best practices (i.e. how to actually do the work)
- Oregon statute requires "Maintenance Plan", National Reserve Study Standards recommends a "Preventive Maintenance Manual"
  - Statute does not necessarily make maintenance plan part of the study; reserve studies updated annually while maintenance plans updated as necessary
- Community Association Maintenance Manual available through CAI National
  - [https://foundation.caionline.org/wp-content/uploads/2023/06/BestPracticesCAMaintenance.final2\\_.pdf](https://foundation.caionline.org/wp-content/uploads/2023/06/BestPracticesCAMaintenance.final2_.pdf)




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**Questions?**




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## **Approaching Security & Safety in 2024**

9:30am – Breakout Room #2

Presenters: Mark Wells – Clean and Safe  
& Reid Kerr – Pacific Echelon

## **Mark Wells:**

Executive Director, Downtown Clean & Safe and Vice President of Downtown Services Downtown Clean & Safe. Mark Wells came to the Portland Business Alliance and Downtown Portland Clean and Safe in February of 2021 as the Director of Operations after a two-year stint in sales and marketing for a local security firm. Apart from this experience, Mark has spent his career in public service in a variety of federal, state, and local law enforcement and crime prevention positions and roles.

Mark made his way up to the Northwest after 9/11, when he was in federal law enforcement and transferred to the Air Marshal Service and was based in Seattle. After meeting his now- wife of 17 years in Portland during this time, he moved to Portland and served as a municipal police officer and a state humane agent before working for almost 11 years with the City of Portland's Crime Prevention Program. It was this role where Mark found his true calling- community organizing and public safety advocacy work. Mark worked and supported community-based crime prevention and public safety programming in almost every neighborhood and business district in Portland. This time provided a rich opportunity to make and build long and lasting relationships and partnership with many government and community groups, individuals, and organizations.

On November 1<sup>st</sup>, 2021, Mark was appointed as the new Executive Director of Clean & Safe and Vice President of Downtown Services for the Portland Business Alliance. He now leads a small but seasoned and accomplished team of professionals to manage a host of vital downtown programs including the Clean Start janitorial program with Central City Concern, a new and updated safety services program, a series of retail and marketing programs and initiatives, and a new mental health outreach program. Mark is excited and thankful to be in a role helping our downtown community bounce back from a challenging couple past years and supporting all Portlanders who call downtown their home, place of work or playground.

## **Reid Kerr:**

I was born and raised in the Pacific NorthWest with a passion for sports and the outdoors. I graduated Highschool and attended college at Mid America Christian University. In January 2013, I was hired as a Police Officer for the City of Chickasha, Oklahoma. During my Tenure at Chickasha Police Department I attended several great schools including SWAT, Basic Instructor, Narcotics Air Assault School, Bicycle School, Rifle School, Advanced Shooting Schools and many other great experiences. After 3 years of service I qualified for service as a member of the SWAT team.

I made a switch of departments joining the Chickasaw Nation Lighthouse Police in 2017. While at Lighthouse, I received a state cross commission with the Oklahoma Bureau of Narcotics and federal special commission through the Bureau of Indian affairs. I was promoted to K-9 officer and was a field training officer for the department. By the end of my law enforcement career I had been the recipient of several awards such as the Medal for Valor, Lifesaving Award, Police Commendation with Risk, Narcotics officer of the Year award, and Officer of the Year award.

Since leaving law enforcement, I co-founded Echelon Protective Services in 2019. Echelon is one of the fastest growing security firms in Oregon with over 120 full time employees spanning 5 states. I currently serve as the Chief Operations Officer and oversee the operations of our company.

WESTERN OREGON CHAPTER  
**community**  
ASSOCIATIONS INSTITUTE

# Approaching Security / Safety in 2024

## Four Pillars of Successful Security Programs

Presented by:

Reid Kerr  
Co-founder & Owner Echelon Protective Services

Mark Wells  
Executive Director, Downtown Portland Clean & Safe

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**How we connected? - One property into a meaningful relationship.**

What is the current landscape of security and safety?

What does the next 5 years look like?

How does this affect Security, your properties, and people? - Private Security, training for staff, attention to protocols.

How to develop a safer city and space through public and private partnership.

WESTERN OREGON CHAPTER  
**community**  
ASSOCIATIONS INSTITUTE

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**Importance of Connection to the Community: Leadership and on the Ground**

Two Major Problems Facing Managers and Above

I. Not being connected the on the ground staff:

If a organization is not deeply connected to the community both at a high level and on the ground it will not understand trends, safety, and programs that promote safety for its members.

Often times we see groups silo themselves with managers and on the ground personnel experiencing issues that leadership does not fully understand.

**Solution:**

This requires leaders in property management to be on the ground understanding the safety issues affecting their people.

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**community**  
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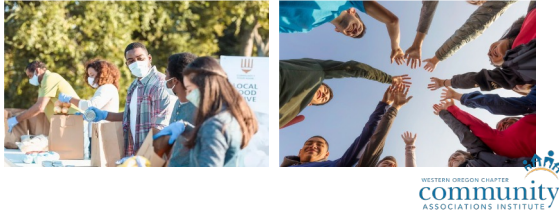
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### Importance of Connection to the Community: Leadership and on the Ground

II. Not being connected or involved in the community.

**Solution:**  
Developing the connections to the right people in the community to effect change for their people.



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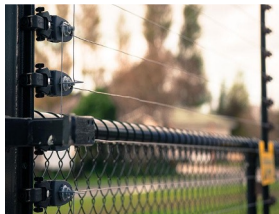
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### Understanding the Importance of Perimeter Focused Safety

Whether you are in Baghdad Afghanistan or Portland Oregon. The most important thing for safety is setting up the proper perimeter focused safety measures.



When an organization approaches all methods of safety from this proactive method it allows for the people inside to feel secure and grounded.

Concierge techniques, fencing (rod iron), lighting, and effective camera placement.



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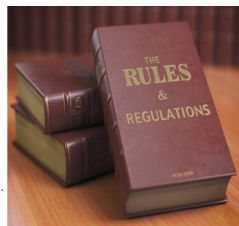
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### Utilizing Fair Housing by Connecting and Educating Vendors and Onsite Security Staff

Lowering liability through soft power tactics through fair housing is the future of safety in multi family residential facilities.

Often times those involved in safety are not considered in fair housing training.

Vendors who perform security or safety are never asked or vetted for fair housing training. Why?



The goal of 2024 safety should be teaching all persons involved in safety the importance of fair housing as it applies to safety on the property.



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### Utilizing Technology to Lower Cost and Increase Efficiency

As recent as 2023 AI, drones, specialized access controls have all been introduced as effective options for safety in property management.

The key is the ability to leverage technology to enhance safety through proactive approaches with tools such as smart cameras, access control, ect.



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### Tips and Strategies for choosing high quality private security - Ask!!

- 1) Will I have one person to work with during our contract for any questions, concerns, information?
- 2) Will you assign the same security staff to my account? If not, why not?
- 3) How will you communicate with me, and designated client contacts when there are incidents, police activity on site, accidents, or anytime your security staff is involved in anything other than a regular shift?
- 4) Ask for 2-3 references for current or former clients where you provided security for a similar size and type of location.
- 5) If I were to ask a local Police Officer in this area about your company and the caliber of your security staff, what do you think they would say?



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### Tips and Strategies for choosing high quality private security - Ask!!

**Additional advice:**

- Always get a minimum of 3-5 proposals from individual security vendors
- Ask surrounding businesses or neighbors who they use for security and ask for contacts
- Review contract language in fine detail and review cancellation options
- Include residents/tenants on new security vendor- invite security company to speak and work directly with residents!
- Ensure residents/tenants know how to access the security services they are paying for
- Remember- quality security is not cheap, but well worth the cost if professional and effective



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## **Beyond the Maintenance Plan**

11:15am – Breakout Room #1

Presenter: Justin Barnhart – Certa Building Solutions

## **Justin Barnhart, Reserve Specialist:**

Building Science Specialist | CEI, LEED, AP, RS

Justin Barnhart is a Building Science Consultant with over 12 years' experience as industry leading Reserve Study provider. Justin has obtained the Reserve Study Provider (RS) designation from the Community Association Institute (CAI) with his building science background a cornerstone of his practice. He is able to provide superior guidance for short and long-term reserve planning and provided budget forecasting for hundreds of community associations, numerous market rate properties, and many affordable multi-family housing projects, and state-owned facilities throughout the region.

## Beyond the Maintenance Plan



Presented by:  
Justin Barnhart, Director of Assessments and Rehabilitation  
Certa Building Solutions



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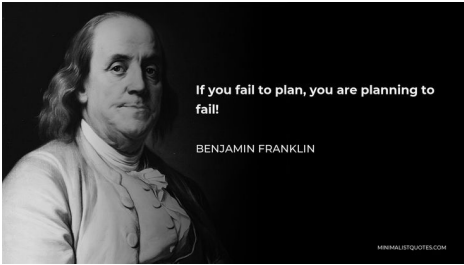
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## Presentation Outline

- Review the historical implementation of traditional Maintenance Plans and their limitations.
- Explore strategies to enhance the approach to long-term building maintenance.
- Highlight some typical maintenance projects that are often overlooked
- Questions at the end.



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## Concepts:

- Primarily Building Envelope Focused.
- How to approach building evaluation and obtain the important information.
- Enhanced Maintenance Plans: Prioritizing repair strategies for aging infrastructure, deferred maintenance, and defective construction
- Explore phased concepts for long-term building maintenance, selective rehabilitation, and adaptable repairs.
- Strategies for developing accurate budgets for long-term planning.




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Justin Barnhart, Principal  
Director of Assessment and Rehabilitation



### Background:

- Graduated from Portland State University 2006.
- Designated Reserve Specialist since 2009 (CAI #240).
- 18 Years of industry experience as a Building Envelope Consultant.

### Experience:

- Failure Analysis of hundreds of multi-family and commercial buildings.
- Design and oversight of numerous rehabilitation projects.
- Development and expansion of reserve study services in Oregon, Washington, Utah, Nevada, and Florida.




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## Statutory Requirements: The Original Sin

- Reserve Study Legislation ORS 100.175
- Maintenance Plan Legislation ORS 94.595

The board of directors shall prepare a maintenance plan for the maintenance, repair and replacement of all property for which the association has maintenance, repair or replacement responsibility under the declaration or bylaws or ORS 94.550 (Definitions for ORS 94.550 to 94.783) to 94.783 (When certain administrative provisions apply). The maintenance plan shall:

- (A) Describe the maintenance, repair and replacement to be conducted;
- (B) Include a schedule for the maintenance, repair and replacement;
- (C) Be appropriate for the size and complexity of the maintenance, repair and replacement responsibility of the association; and
- (D) Address issues that include but are not limited to warranties and the useful life of the items for which the association has maintenance, repair and replacement responsibility.

The board of directors shall review and update the maintenance plan described under this subsection as necessary.




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## Reserve Studies and Maintenance Services

### Value vs. Cost

- Superficial Assessment of Building Systems
- Oversimplification of condition
- Vague Replacement/Maintenance Assumptions
- Stabilize vs. Replace

### Predicating the Maintenance Plan from the Reserve Study:

- Post justification of costs
- Condition of Materials vs. Functionality of System




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## Limitations of the Traditional Maintenance Plan

### Who are maintenance plans for?

- Hint: Not the contractors.

### What's in a Maintenance Plan?

- **Preventative Maintenance\***
  - Tendency towards boiler plate
  - More detail = More technical (i.e. Technical Jargon)
- **Inspections**
  - Who is performing the inspections? (Qualifications)
  - Access
  - Timing
- **Janitorial**




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## The Premise of Preventative Maintenance

Maintenance performed to preserve present condition of an existing system.

- More affective on well constructed buildings
- Free of major performance issues or defects
- Existing system is serviceable




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## Rethinking the Maintenance Plan:

Starting with a Building Envelope Conditions Assessment (BECA)

### Building Envelope Condition Assessment (Visual)

- Identify the system in service – Limitations
- Establish basic condition
- Probably service life expectations

### Destructive Testing (Failure Analysis):

- Understand materials in service
- Identify workmanship issues
- Identify performance issues
- Identify material compatibility issues

### Goal: Comprehensive Risk Analysis

- Understand the systems in service
- Realistic service life expectations
- Identify opportunities to maximize or extend service life




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## Additional Testing Considerations

### Moisture Probing – Concealed Conditions

- Stucco
- Exterior Insulated Finish System (EIFS)

### Adhesion Testing – Manufacturer

- Waterproof Coatings
- Paint Coatings
- Sealants

### Plumbing Systems – Engineer/Contractor

- Domestic Water – Section cuts
- Waste Lines – Section cuts above grade / Scoping below grade

### Thermal Imaging – Certified Thermographer

- Low Slope Roofing




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## Comprehensive Scope of Repair (SOR)

### Establishing the Design Intent

- Sufficiently Detailed
  - General Conditions
  - Description of the work
  - Systems and Products
  - Adaptability
  - Warranty Expectations
- Itemized for Phasing
- ROM Pricing from a Reputable and Qualified Contractor




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### Enhanced Maintenance Plan

Utilizing the BECA and SOR to prioritize building Maintenance

- Review the global budget compared to reserve revenue
- Establish repair priorities
- Develop phasing plan
- Integrate the prioritized repair plan into the reserve study
  - Fund the reserve
  - Stick to the plan
  - Update pricing periodically



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### Targeted Siding Repairs



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### Roof Replacement – Steep Slope



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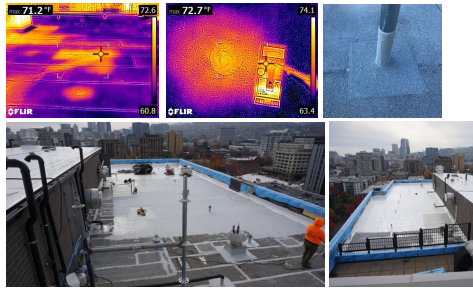
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### Roof Renewal – Low Slope



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### Podium Slab/Planter Bed Waterproofing



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### Podium Slab/Planter Bed Waterproofing - continued



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### Coatings



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### Waterproof Balconies and Walkways



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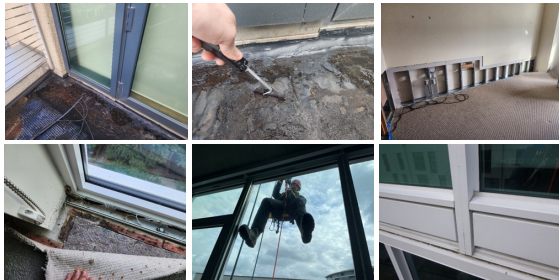
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### Towers



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## **Fire Suppression – Creating Safer Communities**

11:15am – Breakout Room #2

Presenters:

Kim Kosmas – Portland Fire and Rescue  
& Kim Haughn - Tualatin Fire and Rescue

**Kim Kosmas:**

Portland Fire & Rescue for over 25 years  
NFPA Fire Inspector I & II cert.  
Firewise/USA Regional Coordinator – Portland, OR  
Currently manages the Public Education Office (has managed for 9 years)

**Programs managed:**

Belmont Firehouse Museum  
Outreach and community event participation  
Provide presentations on fire safety, disaster prep & wildfire risk reduction & prep  
Firewise/USA program  
Smoke alarm program  
Houseless shelter inspections  
Youth Firesetter Intervention Specialist program manager

**Kim Haughn:**

Kim Haughn is a Community Risk Reduction Manager at Tualatin Valley Fire & Rescue. She's worked for the fire district for eight years. Prior to TVF&R, she worked for Washington County's Department of Land Use and Transportation for 11 years. She has a bachelor's degree in social and behavioral sciences from Linfield University and a master's degree in public administration from Portland State University.



**Creating Safer Communities**

CAI Conference - Friday, March 15, 2024

Presenters:  
Kim Haughn, Tualatin Valley Fire & Rescue  
Kim Kosmas, Portland Fire & Rescue





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**WHAT WE WILL COVER**

- Ways to reduce risks
- Steps to be prepared for any disaster
- Everyday fire & life safety tips
- Common causes of fire
- Q & A





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**READY, SET, GO!**

Reduce risk.  
Have a plan.  
Be prepared to go.

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## DEFENSIBLE SPACE

**ZONE 1**  
Immediate  
0-5 feet

**ZONE 2**  
Intermediate  
5-30 feet

**ZONE 3**  
Extended  
30-100 feet

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## ZONE 1

**Zero – 5 feet**

- Shrubs
- Tree branches
- Rain gutters
- Foundation vents
- Bark chips

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## ZONE 2

**5 – 30 feet**

- Lawn
- Fire-resistive plants
- Fallen leaves & needles
- Wood piles
- Storage under decks

**FIRE-RESISTANT PLANTS FOR HOME LANDSCAPES**  
*Selecting plants that may reduce your risk from wildfire*

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## ZONE 3

**30 – 100 feet**

- Tree canopy
- Ladder fuels
- Fuel breaks
- Access
- Address signage










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## CREATE A PLAN

- Evacuation plan
- Communication plan
- Preparation checklist
- Emergency supply kit for each person and pet









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## EVACUATION LEVELS

**LEVEL 1 – Be ready.**

**LEVEL 2 – Be set.**

**LEVEL 3 – GO!**






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## FIRE & LIFE SAFETY TIPS



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## EXTINGUISHING A FIRE



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## SMOKE ALARMS



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### ACCESS & FIRE LANES



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### WATER SUPPLY



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### COMMON CAUSES OF FIRES



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## COOKING FIRES

#1 cause of home fires.

Easily preventable.



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## SMOKING MATERIALS



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## LITHIUM-ION BATTERY FIRES



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## OTHER FIRE CAUSES

- Appliances
- Heating devices
- Candles
- Bathroom fans



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## CONTACT INFO



Kim Haughn – Tualatin Valley Fire & Rescue  
 Community Risk Reduction Manager  
 503-259-1192  
 kim.haughn@tvfr.com  
 www.tvfr.com

Kim Kosmas – Portland Fire & Rescue  
 Senior Public Education Officer  
 503-793-6035  
 kim.kosmas@portlandoregon.gov  
 www.portland.gov/fire



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**Stump The Experts!**  
**Have Your Questions Ready!**

1:45pm – Breakout Room #1

Presenters:

Jason Grosz -Vial Fotheringham  
Caren Fewell – Blue Mountain Community Management  
Tim Cline – Cline Agency  
Mike Lindor- Tatley Grund





