

Community LEADER

News for the New American Neighborhood

In this issue

Investing

Roofing Challenges

Rules

Viburnum Leaf Beetle

And Much More...



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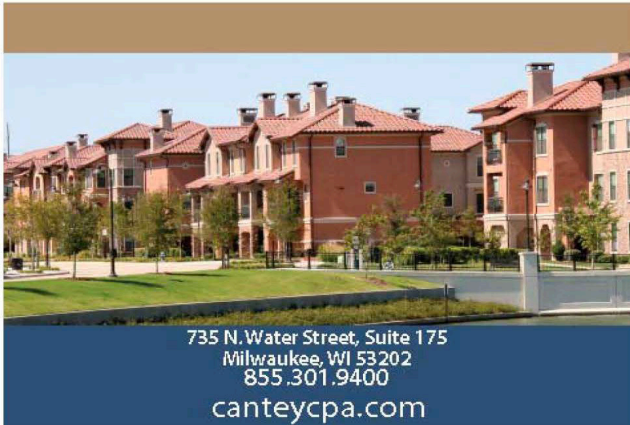
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News for the New American Neighborhood



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President's Message



Our industry has been in the news and social media due to the tragedy that happened in Miami. We continue to keep the families and the rescue workers in our prayers as they try to find loved ones and begin the healing process because of this tragic event. I am sure all of you have had conversations with clients, fellow board members and friends about this. This event is the worst-case scenario for any

CAI-Wisconsin has many qualified business partners skilled in inspecting and repairing the small items before they become a major costly repair. Review our directory when in need of a quality contractor that has partnered with the Community Association industry.

At a minimum, all communities should engage a reserve study professional to review and provide a long-term reserve component plan. The reserve study company will have engineers review the main components of the property for immediate repairs and establish a plan for the repair/replacement of all Common and Limited Common elements. A good reserve study company will give your association a 20 to 30-year plan to fund the repairs/ replacements by properly funding your reserve to help prevent special assessments in the future. The CAI-WI directory has a few quality companies to choose from.

Let us all do our part in protecting and preserving the communities we serve.

Sincerely
Todd Sarauer, CMCA, AMS, PCAM
 CAI-WI President

Community Leader.

I encourage everyone to reflect on the event and ask how we can play a role in making sure that it never happens in our community. Performing our fiduciary responsibilities has never been more important. How do we do this? As community leaders we need to engage in discussions for preventative and routine maintenance, adequate reserve funding and property evaluations. Large problems tend to start by not addressing small items such as drainage, HVAC maintenance, regular painting, plumbing inspections and other building items.



CAI-WI Annual Conference & Tradeshow Thursday, September 9th 10:30am-4:30pm

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INVESTING

FIDUCIARY RESPONSIBILITY IN INVESTING RESERVE FUNDS

By Michael Layer and Myles Philipp, CPA



One of the most difficult tasks a board member has is keeping the Association in peak condition while also making the Community affordable for those who live there both present and future. This tightrope requires extreme care and precision. There is no better example of this than the Board of Directors responsibility in maintaining adequate reserves. The responsibility to maintain adequate reserves requires each board member to take on the fiduciary duty to act in the best interests of the other members of the Community. Due to the significance of this role, it is important to understand the three pillars of fiduciary responsibility as it relates to investing the Association's reserve funds. These include protection of principle, investment rates of returns, and liquidity of investments.

The first pillar of fiduciary responsibility as it relates to investing the Association's reserve funds is protection of principle. The only certainty of the economy is the uncertainty. This uncertainty means the Board of Directors when setting an investment strategy should be risk adverse and value the protection of principle over higher yields. During a bull market this strategy can cause frustration, but during a bear market will keep the Association moving in the right direction. Some examples of investments that the Board of Directors should consider include, Money Market Accounts, Certificates of Deposit, Treasury Bills, Treasury Notes, other direct obligations of the U.S. Treasury, and AAA rated tax-exempt municipal

bonds. The protection of principle is key in helping the Board of Directors to the goal of maintaining adequate reserves. If the Association invests in high-risk investments that put the preservation of principal at risk, the Board should consult their attorney and insurance agent regarding their directors and officers (D&O) liability insurance and if the Board of Directors are still covered.

The second pillar is investment rates of returns. While this may seem in contradiction of the first pillar, this second pillar is vital for the protection of principle to succeed. While keeping reserve funds in checking accounts would meet the criteria of protection of principle, it is not fulfilling the Board of Director's role as fiduciary to the members of the community. While it may seem time consuming to find the best rates, we recommend the Board of Directors use the services of the professionals around them to help with this pillar of fiduciary responsibility. Securing a return on investments can play a major role in helping the Association meet future needs while lessening the burden on residents to cover the costs of future projects.

The third pillar is liquidity of investments. Whenever making investment decisions, it is important to consider the cash flow needs of the Association. When making this decision, it is always important to air on the side of caution as needs can arise unexpectedly. For example, when investing in certificates of deposit, it may benefit the Association to stagger the maturity dates. As with protection of principle, there will always be a cost benefit analysis the Board of Directors will need to consider when making decisions. Having the right tools in place to make these decisions, such as a reserve study or board of directors' five-year plan, will help make the decisions a little easier.

As the Board of Directors consider the above pillars of fiduciary responsibility as it relates to investing the Association's

reserve funds, it is equally important for the Association to document their decision-making process with a written investment policy. As with any policy, it is not a static document, but one that is reviewed periodically to ensure it serves the Association well. The Board of Directors should have their attorney review any investment policies to make sure they are in line with the Association's governing documents and any applicable laws. In addition, the Board should make sure all accounts are within the \$250,000 FDIC (Federal Deposit Insurance Corporation) limits at each financial institution.

Another consideration of the Board of Directors when writing their investment policy should be the tax implications it may have. Community Association's may fulfill the requirements to file Form 1120H or Form 1120. Different types of investment income and losses may have different implications to the Association based on each Association's specific tax position. We recommend the Board of Directors consult with their tax professional when determining the tax implications of an investment strategy.

The Board of Directors have a lot of decisions to make as they work towards keeping their Community Association at its best. While making these decisions the Board of Directors need to make sure to consider their fiduciary responsibility to the members of the Community Association. While just part of the consideration, the role of investing the Association's reserve funds is an important one that should be discussed by the Board of Directors to make sure the policies and investments in place are helping the Board of Directors and Association to its goals.

Michael Layer and Myles Philipp, CPA of Mark Cantey and Associates specialize in audit and tax services for Associations. They can be reached at mayer@canteycpa.com and mphilipp@canteycpa.com



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ROOFING CHALLENGES

ROOFING INDUSTRY FACES UNPRECEDENTED SUPPLY CHAIN DISRUPTION



Material shortages, unpredictable wait times and price increases are expected to last through 2021.

The last few years have been hard on the roofing industry. Significant roadblocks in the residential roofing supply chain have led to material shortages, production stalls, price fluctuations and shipping delays across the country – including in Wisconsin. For homeowners, all of that means higher prices and longer lead times. Unfortunately, it's going to be a while before it gets better.

Below are the most prominent factors contributing to the disruption.

- **COVID-19** - Mass quarantines, tariffs, curfews, travel restrictions, downsizing and workforce shortages altered all aspects of the roofing industry. As “post-pandemic” business resumes, these issues continue to cause production delays and limited material availability.

- **Consumer Confidence** - In line with strikingly low economic optimism in 2020, material manufacturers reduced production and minimized inventory. Now that consumer confidence has returned with a vengeance, it will take time to get production levels back up to speed.

- **Transportation** - Manufacturers need materials for production, and roofers need finished products for installation. Both require reliable

transportation, which is severely lacking right now. Routes have seen border closures, shipping delays, container shortages and a near tripling of freight rates over the last year.

- **Natural Disasters** - Nature is always a wild card. Countless building-damaging events including wildfires, a 300-mile-wide derecho in the Midwest, hurricanes, tornadoes and extreme hail have significantly increased roofing demand on an already-overstretched market.

With such a wide variety of circumstances at play, the roofing supply chain is unlikely to fully recover this year. This is stressful for everyone, but especially homeowners who rely on their roof for essential protection and performance.

So what can be done in the meantime?

For roofers, communication is key to managing customer expectations and helping them make the best decision for their home long-term. It is important to be realistic and honest about the various factors creating uncertainty around material availability, lead times and potential price increases in the foreseeable future. Have these conversations early and often to mitigate disappointment and keep everyone in the loop.

Homeowners should also be aware of their agency in this situation. When choosing a roofer, watch out for “too good to be true” timelines and promises. This is especially true in times of natural disasters, such as hail storms, when fly-by-night manufacturers and suppliers show up with inferior skills and products to prey on customers in desperate situations. Whether your roof job is an emergency post-storm necessity or a project planned for months, it's wise to take precautions.

Here are some tips for hiring a roofing company you can trust:

- Choose an established local business. Local companies know the climate conditions your roof will need to withstand and are familiar with the building codes and regulations in your area.

- Verify proper licensing and insurance. They should be licensed in the state your home is located.

- Review awards, certifications and customer testimonials to gain insight into their service and reputation.

- Ask to see copies of warranties, both from the materials manufacturer and on the business's workmanship.

The biggest thing to remember is that now more than ever, research and patience pays off. Know that the lowest price is not always the best deal. Paying a little extra for a roof you can rely on for decades to come is better than facing the costs and anxieties of a roof that fails after just a few years. A quality roofing company will be able to authenticate their products and stand behind their warranties – even in the midst of industry-wide setbacks.

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RULES

RULES...WHEN IT'S TIME FOR A CHANGE

By Brandon Grosz CMCA, AMS, CERT and Carissa Pezewski, CMCA, AMS



Rules—a word that is heard often and involved in all facets of life, and one that is especially important within a condominium association. When purchasing a condominium, the buyer is given disclosure documents. These should be read thoroughly to understand the rules one needs to abide by when living in a condominium association. Often, the buyer does not read all the documents and, consequently, finds surprises along the way that were not expected.

Governing documents have a hierarchy to reading them: Declaration/CC&R's, Articles of Incorporation, Bylaws, and Rules and Regulations. If the declaration states one thing, a rule cannot be created to state the opposite, and the higher document will prevail. The documents, in most cases, give the board the right to create rules and regulations for the association.

When a rule should be created is a conundrum that boards face. There are situations that arise that may warrant a rule, but in a lot of instances, there is verbiage in your governing document that addresses this situation. Creating rules can become a power trip, and if a new rule is created every week or month, homeowners become aware of this. If the board has the power to create rules, setting up a rules committee can help in creating rules that are more community-generated.

Every homeowner is entitled to an enjoyable living experience, but unfortunately, there will be some that

disrupt that. However, before a rule is created, the documents need to be carefully reviewed to ensure it is both needed and does not contradict a higher document.

Ideas for creating rules seem to come up more frequently in the summer months when people are active outside, pools are open, boats are in boat slips, etc. Property managers often get inundated with complaints from homeowners and must review to determine if these are just complaints or if there is an actual rules violation. It is common when one homeowner gets a violation letter to then report a violation on someone else, so having a clear set of rules is important.

As boards and property managers look to change rules and regulations, there are two questions to ask: Will this better the community? When should this rule change occur? At times, proposed rule changes are simply knee-jerk reactions to make one homeowner comply with the association's standards of doing things in the community. Most of the time, this is because certain events are happening and homeowners want something done about it immediately.

As a property manager, I advise all my board members to review the rules and regulations at least once a year to make decisions on what to add

or what is outdated and no longer applies to the community. This adds consistency to how an association conducts needed changes and helps clarify any confusion to homeowners as to which set of rules are currently in place.

Finally, in my time as a community manager, I often get calls after a rule change as to why homeowners were not consulted or met with when rules were changed. To provide transparency to homeowners, it is a good idea to meet with residents via a town hall meeting, not a board meeting, and listen to their concerns over specific rules they see as too lax or too strict. This way, management and boards are providing every opportunity for residents to have a voice in their community.

Brandon Grosz, CMCA, AMS, CERT is a certified manager of condominium associations with Hunt Management Inc, AAMC and Carissa Pezewski, CMCA, AMS is the Director of Community Associations with MPC Property Management.

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VIBURNUM LEAF BEETLE

THE CASE OF THE DISAPPEARING LEAVES

By Kyle Babicky

In the past few years, there have been numerous cases of disappearing leaves on viburnum shrubs. These reports seem to be growing each year. One spring day you're out in the yard, admiring the recently emerged leaves after a long cold winter. Then a week later you look, and the leaves are gone! And so begins our case to find the suspect and recover our lost foliage...

As we investigate closer to where the leaves once were, we notice that they are not entirely gone. Most of the branches still have remnants of leaves, but they've turned brown, and they more closely resemble a skeleton than a healthy leaf. In some cases, maybe only a portion of the leaves have been taken. As we take a closer look at the mostly intact leaves, aha! We've caught our suspects red-handed. It is none other than the notorious VLB (Viburnum Leaf Beetle).

Viburnum Leaf Beetle (*Pyrrhalta viburni*) is an insect that feeds on the leaves of... you guessed it, viburnums. Arrowwood Viburnums seem to be their preferred host, but most viburnums can be affected. This pest is native to Europe but has found its way to North America several years ago (Canada in 1947 and New York in 1996), and eventually into Wisconsin in recent years. For Wisconsin, it was first discovered in Dane County in 2009 and was successfully eradicated. It once again showed up in Milwaukee County in 2014 and has been seemingly growing in population ever since. We now see it very readily throughout Southeastern Wisconsin.

Viburnum Leaf Beetle (VLB) eggs hatch in late April to early May, and the larvae begin feeding on the undersides of leaves between the veins. The larvae

can look like a very small grub (1mm to 1cm in length) but can usually be seen with the naked eye. Unfortunately, VLB feeds very quickly and defoliation can happen within a week or two if populations are high enough. Once the larvae have matured, they go into the soil to pupate, and emerge in early July as adults.

The adults look more like a traditional beetle but are still quite small



VLB larvae feeding on leaves.

Photo Credit - Univ. of Massachusetts Amherst

(approximately 6mm in length). The adults will also continue to feed on leaves but tend to be less destructive than the larvae. The adults will stick around until the first frost. Female adults will lay eggs during mid to late summer along twigs.

Although the Viburnum Leaf Beetle feeds quickly and can even defoliate a shrub, the foliage usually does come

back. However, repeated defoliation can weaken the viburnums enough to be fatal. It is helpful to stay ahead of the VLB population once it is discovered on your plants.

There are multiple ways to try to control Viburnum Leaf Beetle. One way is to prune out egg-laying sites that can be most easily seen during fall/winter after leaves have fallen. Pruning and disposing of these eggs can drastically reduce the population on the plant(s) the following spring.

There is also the ability to use insecticides to control Viburnum Leaf Beetle. Chemical control tends to be most effective using an insecticide spray as soon as the larvae begins feeding. Dormant oil sprays before bud break can also be effective at reducing the amount of eggs that hatch. Controlling the larvae will naturally reduce adult populations. The adult beetles can also be sprayed as well but are more difficult to control.

Soil applied systemic insecticides can also control VLB feeding, but we must be careful to consider potential effects to beneficial insects and pollinators. If systemic insecticides are used, they should be applied AFTER the viburnum is done flowering, which could shorten the available application window.

Another control method is to replace the viburnum with something else, and/or consider a different species of shrub for new planting projects. Once viburnum leaf beetle is discovered on the property, it is likely to be an ongoing effort to control their feeding damage. For the long-term, it might be more effective to simply plant something that doesn't require monitoring, pruning, and/or chemical treatments.

So, what is the long-term outlook of Viburnum Leaf Beetle in Wisconsin? The short answer is that we don't know for sure. Our best comparison is to look where the beetle has already been for a

VIBURNUM LEAF BEETLE CONT.

long period of time. In New York, they had a high population of VLB over 15 years ago, and subsequently experienced a lot of feeding damage to viburnums in the area. Since then, there has been a decrease of the overall VLB population in that area. This is likely due to a decrease in food sources (both from dying viburnums and other shrubs being used instead) and increase in natural predators.



VLB EGG SITES

Photo Credit - Cornell University

It is unlikely that Viburnum Leaf Beetle will be eradicated, but we will hopefully see a reduction in their populations once our landscapes adjust to their sudden arrival and boom in population. Until then (and possibly even after) the above control measures will need to be used to protect the susceptible viburnums in our landscapes.

Kyle Babicky is a Board Certified Master Arborist with Wachtel Tree Science. Kyle may be reached at (262) 538-1900.



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*We look forward to
seeing you at next
years golf outing*

CAI-WI 2021 ANNUAL GOLF OUTING



Can you dig it? Cool Times.

The 16th Annual Golf outing was a huge success. The weather was bit cool but the event attendees were Way Cooler dressed up in themed tie dye.

The Sponsoring Business Partners were super excited to be in outside spaces with the membership. Over 150 people attended the CAI Golf Event and the Golf Committee wants to thank everyone who attended! We hope that everyone had a safe day, were able to network and meet new CAI contacts. Great food, great golf, and groovy people makes for a Groovy day.

A special thanks goes out to our many Individual Sponsorships and the Event sponsor for making this day totally memorable. The Committee really appreciates that our business partners got their "groove on" to support the CAI-WI with an abundance of raffle prizes. The Fairways of Woodside in Sussex did an awesome job to provide great course conditions and served up an amazing banquet.

The Golf Committee has already started planning for 2022. Our future golfing destination is still being determined. We always welcome feedback as to this year's outing and hope to make 2022 more memorable for you, the CAI Members.

Thanks so much.

Eric Swanson
Golf Committee Chair





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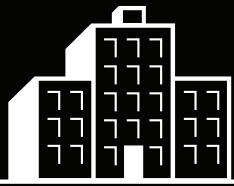
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