



Application

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 LINDSAY INSURANCE GROUP

ABOUT GOLD STAR®

Life is Better in a Gold Star Community®

CAI's *Gold Star Community®* program recognizes those communities that work hard to develop and maintain standards, encourage community participation, maintain fiscal stability and positively impact the quality of life for residents.

Homeowners and managers alike believe this program is an excellent way to evaluate policies and procedures, and assure that their community operates within basic industry standards.

PLEASE NOTE: Judging standards are subject to change.

Applications are scored by a team of judges. Certain questions on this application, if not answered satisfactorily, will result in the automatic failure of the application.

An independent review panel that may be comprised of an attorney, reserve professional, insurance professional, an elected association volunteer or homeowner, a certified public accountant, a community association manager and/or a contractor, will review applications. If an applying association does not qualify upon first submission, the association will be advised as to what area(s) need improvement. Associations may respond within 90 days at no additional charge. If no response is received within 90 days, the applicant may resubmit a new application with appropriate fee.

Communities who are awarded the Gold Star rating will receive an outdoor sign and a certificate suitable for framing. Each association approved as a Gold Star Community will be recognized for their achievement by CAI.

SUBMISSION CRITERIA

- **DEADLINES:** There are two application periods each year. January 1-March 1; August 1-October 1.
- Applications submitted outside of these periods may be held for review until the next period.
- CAI membership is not a requirement.
- All applications must be submitted on the forms provided with required attachments. Applicants may be asked to supply additional supporting documentation.
- Gold Star Communities© are required to submit a renewal application every three (3) years.

COMPLETE NAME OF ASSOCIATION _____

DISCLAIMER

The Gold Star Community Program indicates to professionals, business partners, and existing and prospective owners that the community follows basic and open policies and procedures. Associations participating in this or any other program sponsored by the chapter remain responsible for their own liability and the liability of their volunteers, officers, and employees. In determining that a community qualifies for the Gold Star rating, the chapter evaluates procedures and practices of the association for general conformance with industry standards based upon answers in a questionnaire developed by the chapter and certain supporting documentation. The chapter does not have the resources to investigate the accuracy of information supplied by the association and does not do so. No one is entitled to rely on the Gold Star Community program as an indicator of the fiscal soundness or proper operation of the association or for any other purpose.

Non-Renewing Communities or communities that fail the renewal process are not authorized to continue using the Gold Star sign, logo or name in any manner.

APPLICATION TYPE (please choose one.)

- New Application Renewal Application

MANDATORY DOCUMENT CHECKLIST

Please include one copy of each of the following with your completed application. (*application will not be accepted without the following documents*):

- | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Capital Budget | <input type="checkbox"/> Insurance requirement from governing documents |
| <input type="checkbox"/> Operating Budget | <input type="checkbox"/> Current Insurance Certificate for all insurance policies including Property Coverage, General Liability, D&O, and Fidelity |
| <input type="checkbox"/> Current Balance Sheet | <input type="checkbox"/> CAI Membership Application |
| <input type="checkbox"/> Most recent reserve study
<i>no older than 5 years; completed by an independent reserve professional / engineer</i> | |
| <input type="checkbox"/> Most recently audited / reviewed financial statements. | |

APPLICATION FEES

Each application and Gold Star rating is valid for a period of three years and must be renewed every three years. Please include the appropriate fee according to the chart below, and make checks payable to CAI. **Existing non-member Gold Star communities can apply to renew for \$75.**

Community Size	Fee
Small (1-149 units)	\$155 <i>includes application fee & one year CAI membership *</i>
Medium (150-499 units)	\$175 <i>includes application fee & one year CAI membership *</i>
Large (500 + units)	\$205 <i>includes application fee & one year CAI membership *</i>

CAI offers a discount when you join two or more board members!
 For more information, please contact Gabby Grimes at: gabby@cai-padelval.org.

The application and attachments must be submitted to:

Keystone Chapter, Community Associations Institute
 1100 E. Hector Street, Suite 460
 Conshohocken, PA 19428
 or e-mail to: info@cai-padelval.org

CAI STRONGLY PREFERS SUBMISSIONS VIA E-MAIL.

COMMUNITY INFORMATION

COMPLETE NAME OF ASSOCIATION

TOWNSHIP AND COUNTY

STREET ADDRESS

CITY STATE ZIP CODE

BOARD PRESIDENT

STREET ADDRESS

CITY STATE ZIP CODE

PHONE FAX

E-MAIL ADDRESS

MANAGER'S NAME (IF APPLICABLE)

E-MAIL ADDRESS PHONE

TYPE OF COMMUNITY *(check all that apply)*

CONDO
 PUD
 RESIDENTIAL
 COMMERCIAL
 55+

MANAGED BY

VOLUNTEERS
 ASSOCIATION STAFF
 MANAGEMENT FIRM
 DEVELOPER

COMMUNITY AMENITIES

What community amenities does your association offer?
(Check all that apply.)

- BANQUET FACILITIES / RESTAURANT
- BASKETBALL FACILITIES
- CLUBHOUSE
- COMPUTER LOUNGE
- FITNESS CENTER
- GAME ROOM
- GATED ENTRANCE
- LIBRARY
- PLAYGROUND / TOT LOT
- SWIMMING POOL
- TENNIS FACILITIES
- WALKING / BIKING TRAILS
- OTHER: _____

SHORT ANSWER QUESTION

What does attaining Gold Star recognition mean to your community association?

COMMUNITY DEMOGRAPHICS

YOUR COMMUNITY	SINGLE FAMILY HOMES DETACHED	TOWNHOUSES # OF UNITS	2-5 STORIES # OF UNITS	5+ STORIES # OF UNITS	TOTAL
NUMBER OF HOMES					
EXISTING		+		+	=
MAXIMUM		+		+	=
TOTAL UNITS					

YOUR COMMUNITY *(please check one)*

Transitioned to Full Homeowner Control
 In Transition
 Developer Controlled

GENERAL CHARACTERISTICS SECTION

- | | YES | NO |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| 1. Minutes are kept for Owners meetings. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Minutes are kept for Board / Trustee meetings. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. The association prepares an annual budget in accordance with governing documents. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Annual membership meetings are held in accordance with governing documents. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. There is an opportunity for owner input before or during meetings. | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. The association holds an annual election of officers. | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. An annual board re-organization is held in compliance with governing documents. | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Before each board meeting, board members receive an agenda, minutes of the previous meeting, financials, and other appropriate reports. | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Board meetings may be attended by owners, except when the Board meets in executive session. | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. The association has \$_____ of General Liability Insurance.
<i>(Please attach copy of insurance certificate)</i>
This amount meets or exceeds the minimum amount stated in documents. | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. The association has \$_____ of D&O Liability Insurance. <i>(Please attach copy of insurance certificate)</i>
This amount meets or exceeds the minimum amount stated in documents. | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. The association maintains a record of Resolutions and it is current. | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Resolutions are made part of meeting minutes. | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. The association provides resale packets to new owners as required by law. | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. The board provides orientation kits to new board members. | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Contracts are competitively bid as a general procedure. | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Contractors are required to present a current copy of their insurance certificate prior to commencement of work. | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. The association has active committees that provide reports to the board. | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. Community board members have attended CAI's Board Leadership Development class <i>(This is an extra credit question.)</i> | <input type="checkbox"/> | <input type="checkbox"/> |

FINANCIAL SECTION

- | | YES | NO |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| 1. The association has adopted an annual budget and, at least 30 days prior to implementation, has provided a written copy to all owners. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2A. Has the association received either a Management Recommendation Letter or a Clients Advisory Comments Letter with negative comments from an auditor?
<i>(If yes, please provide copies.)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2B. If yes, has your community taken any steps to address any internal control weaknesses as noted by the auditor?
<i>(Please provide proof of corrective measures. Note: A community's failure to address / correct internal control weaknesses will cause the community to fail this application.)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3A. The association has a fidelity bond for persons handling association funds. <i>(If it is not part of your general liability policy, please provide a copy.)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3B. This amount meets or exceeds the minimum amount stated in the declaration. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3C. Is property manager added as "employee or additional insured"? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3D. Are all board members covered? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. The association has performed or updated a Reserve Study in the past five years using an independent reserve professional. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5A. The association is funding reserves as detailed in the Reserve Study. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5B. The total amount currently in the association's reserves is \$_____. | | |
| 6A. The association has had a non-weather related special assessment in the past three years
<i>(if yes, please list amount of assessment: \$_____.)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6B. If yes, please note the age of the community and reason for assessment.

_____ | | |
| 7. The association contracts for audit or accounting services in accordance with the governing documents.

Please check which services are required by the governing documents and provide a copy of the most recent:
<input type="checkbox"/> Audit <input type="checkbox"/> Review <input type="checkbox"/> Compilation <input type="checkbox"/> Other <i>(specify):</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. As of _____ there are _____ more than 60 days overdue with assessments.
<i>(date) (# of owners)</i>

Total overdue assessments from above is: \$_____ | | |
| 9A. Does the association have a policy on the approval and payments of invoices? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9B. How many board members are required to approve an invoice for payment? _____ | | |

RULES ENFORCEMENT, ARCHITECTURAL CONTROL, COMMUNICATION & COMMUNITY BUILDING SECTION

- | | YES | NO |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| 1. The association has written rules other than those contained in the Declaration and By-Laws. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. The association has written architectural control guidelines. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. The association has written policies for handling rules enforcement. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. The association affords alleged violators an opportunity for due process. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. The association informs owners of rules and rule revisions by the following methods
<i>(check all that apply):</i> | | |
| <input type="checkbox"/> Resale Packages <input type="checkbox"/> Welcome Packets <input type="checkbox"/> Meetings <input type="checkbox"/> Minutes <input type="checkbox"/> Newsletters | | |
| <input type="checkbox"/> Website <input type="checkbox"/> Auto phone/text message system <input type="checkbox"/> Other <i>(please specify):</i> _____ | | |
| 6. The association informs non-owner occupants of rules and rule revisions by the following methods: | | |

Questions 7 and 8 attempt to identify special programs or services which the association offers to improve the quality of life in the association, and/or make your community stand apart and worthy of the Gold Star award.

If not applicable, please explain. Responses are required for Questions 7 and 8.

7. Please describe what special educational, environmental, recreational, social, and / or special events / programs the association sponsors. Attach additional pages if necessary.

8. Please describe what special community services such as transportation, town watch, in-unit repairs, security, etc. the association provides. Attach additional pages if necessary.

If your community association is selected as a Gold Star Community, would you be interested and willing to have it profiled in an issue of CAI's *Community Assets* magazine? YES NO

VERIFICATION

The information submitted on this application has been reviewed and verified by the association board president and manager (if applicable), whose signatures appears below **(unsigned applications will not be accepted)**:

NAME OF BOARD PRESIDENT

NAME OF ASSOCIATION MANAGER (IF APPLICABLE)

SIGNATURE

SIGNATURE

____ / ____ / ____
APPLICATION DATE