



## ARIZONA MULTIHOUSING ASSOCIATION

Board of Directors Meeting  
Thursday, August 20, 2020  
1:00 pm – 4:00 pm  
Zoom Conference Call

The AMA would like to thank our sponsors that made this meeting possible:



**Confidentiality Reminder:** Please do not discuss any of the issues brought forth in Board meetings with anyone outside of the Board. E-mail correspondence between Board members should not be forwarded to non-Board members.

## Table of Contents

|   |    |
|---|----|
| AMA Board of Directors Meeting Agenda.....                            | 3  |
| AMA Board of Directors Consent Agenda.....                            | 4  |
| Financials.....   | 5  |
| AMAPAC/BGF.....   | 17 |
| AMCF Big Hearts.....  | 20 |
| Government Affairs.....   | 21 |
| Membership.....   | 23 |
| Education Conference & Trade Show Phoenix.....                        | 24 |
| Education Conference & Trade Show Tucson.....                         | 24 |
| Tribute Awards.....   | 25 |
| Leadership Development Committee.....                                 | 27 |
| AMA Board of Directors Minutes – May 15, 2020 and July 21, 2020 ..... | 29 |
| AMC Phoenix.....  | 37 |
| AMC Tucson.....   | 37 |
| Communications Committee.....   | 38 |
| Education Phoenix & Flagstaff.....                                    | 40 |
| Education Tucson.....   | 42 |
| Ethics Committee.....   | 43 |
| Events Committee Phoenix.....   | 43 |
| Golf Tournament Tucson.....   | 44 |
| Maintenance Mania Tucson.....   | 45 |
| NAA Report.....   | 45 |
| Networking Committee Tucson.....                                      | 46 |
| Reverse Tradeshow Tucson.....   | 46 |
| Social Responsibility Committee Phoenix.....                          | 47 |
| Social Responsibility Committee Tucson.....                           | 47 |
| AMA Board Contact List.....   | 48 |

**ARIZONA MULTIHOUSING ASSOCIATION**  
**Board of Directors Meeting**  
**Thursday, August 20, 2020**  
**1:00 pm – 4:00 pm**  
**Zoom Conference Call**  
**Agenda**

- I. Call to Order.....Kim Pacheco, Chair
- II. Approval of the AMA Consent Agenda (see below).....Kim Pacheco, Chair
- III. Chair Report.....Kim Pacheco, Chair
  - a. Chair Update
  - b. Introduction of Lyceum Alumni and Emeritus Board Members in attendance
  - c. BGF \$1M Goal Update
- IV. Vice Chair Report.....Reid Butler, Vice Chair
  - a. Tribute Awards – Tomorrow
  - b. 2020 Board Retreat - December
- V. Leadership Committee Report.....John Carlson, Immediate Past Chair
- VI. Finance Report.....Courtney LeVinus
  - a. Financial Report **(action needed)**
  - b. Investment Reports **(action needed)**
  - c. Audit Report **(action needed)**
- VII. AMAPAC and BGF Reports.....Reid Butler
  - a. AMAPAC Board Participation
  - b. Golf tournaments if held - Redirect Funds back to the AMA General Fund
- VIII. AMCF Discussion.....Michelle Sinclair/Natalie Evans
  - a. Virtual fundraising events
  - b. Julie Hurst & Steve Peters Scholarship Recipients
  - c. 2019 Fundraising Grant Recipients
- IX. Government Affairs.....John Carlson/Capitol Consulting
- X. Membership Committee.....Sarah Fluke
  - a. Membership Reports
  - b. Membership Drive
  - c. New Affinity Program
- XI. Trade Show Committee.....Scott Hines
- XII. Tribute Awards Committee (August 21).....Reid Butler
- XIII. President Report.....Courtney LeVinus
  - a. 2021 Dues Discussion
  - b. 2020 Calendar
  - c. Organization Chart
  - d. President Miscellaneous Updates
- XIV. New Business / Old Business
- XV. Adjourn

**Consent Agenda – request a report be removed from consent agenda if discussion is needed**

- a. Approval of Minutes from AMA Board Meeting May 15, 2020 and July 21, 2020
- b. Associate Member Council/Phoenix.....Michelle Howland
- c. Associate Member Council/Tucson.....Sue Campbell
- d. AMCF / Big Hearts.....Michelle Sinclair/Natalie Evans and Lauren Romero
  - i. Phoenix
  - ii. Tucson
  - iii. Julie Hurst Scholarship
- e. Communication.....Dustin Lacey
- f. Education.....Luis Verger
- g. Education Conference & Trade Shows
  - i. Phoenix.....Kim Pacheco
  - ii. Tucson.....Lauren Romero
- h. Ethics.....Debbie Willis
- i. Events.....Linda Coburn/Adam Greco
  - i. Dinner Meetings
  - ii. Reverse Trade Show
  - iii. Perspectives & Projections
  - iv. Maintenance Mania
  - v. Golf Tournament
- j. Golf (Tucson).....Sue Campbell
- k. Maintenance Mania (Tucson).....Lauren Romero
- l. Networking (Tucson).....Elizabeth Beaulieu
- m. Reverse Trade Show (Tucson).....Kim Pacheco/Sue Campbell
- n. Social Responsibility Committee.....Sharon Hosfeld/Lauren Romero
  - i. Project S.A.F.E. (Phoenix & Tucson)



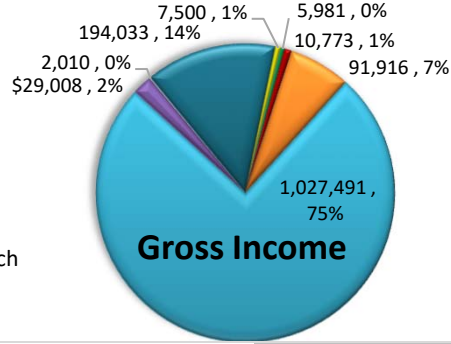
# Financial Dashboard

as of June 30, 2020

| Gross Revenue | YTD Net Revenue | EOY Projected Net | General Investments |
|---------------|-----------------|-------------------|---------------------|
| \$ 1,368,712  | \$ 224,844      | \$ 49             | \$ 1,066,582        |

| AMA & AMCC Cash | BGF Investments | BGF Cash   | Total BGF Balance | AMAPAC Cash | AMCF Cash  | Total Membership | 2020 Unit Growth |
|-----------------|-----------------|------------|-------------------|-------------|------------|------------------|------------------|
| \$ 1,301,699    | \$ 638,959      | \$ 167,470 | \$ 941,680        | \$ 24,430   | \$ 172,721 | 2,313            | 3,837            |

- Events
- Membership
- Education- Phx
- Education- Tuc
- Non-Dues
- Operations
- Community Outreach
- AMCC



## Membership Renewals YTD

|                   | Actual % | Budget % |
|-------------------|----------|----------|
| Regular Members   | 92.9%    | 90.9%    |
| Associate Members | 70.9%    | 75.0%    |

## Membership New Dues YTD

|                   | Actual   | Budget   |
|-------------------|----------|----------|
| Regular Members   | \$38,980 | \$66,129 |
| Associate Members | \$19,915 | \$34,023 |

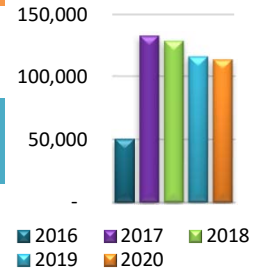
## 2020 Units in Membership

291,021

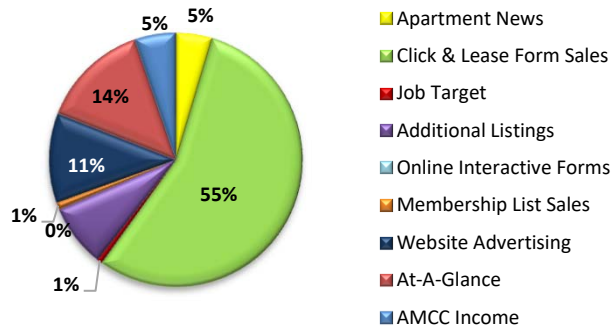
## 2019 Units in Membership

273,548

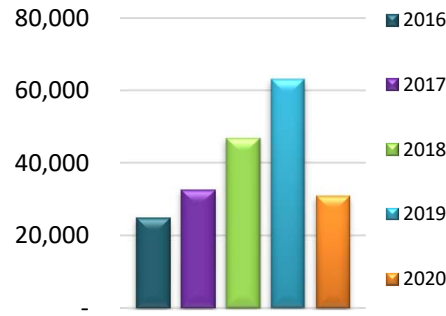
## Click & Lease YTD Snapshot



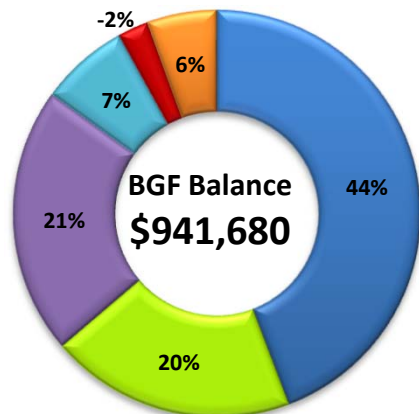
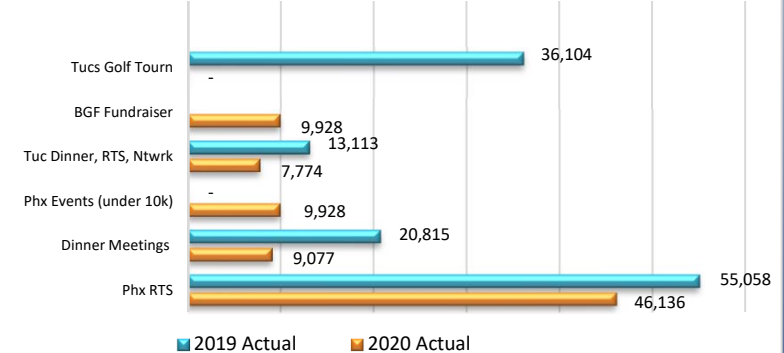
## Non-Dues & AMCC Revenue



## Education Revenue 2016 - 2020 YTD

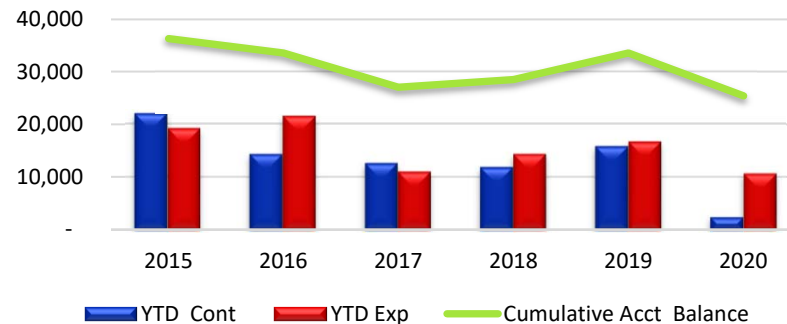


## Event Revenue (Less Direct Expenses) \$72,915



\*Figures are based off of amount billed and will change slightly as some members opt out of the voluntary \$100 or properties drop out of membership. Activity as of 6/30/2020

## AMAPAC Snapshot thru June 30, 2020



## AMCF Snapshot

### Scholarship Fund

\$ 90,652

### Phx Net Fundraising

\$ 6,948

### Tuc Net Fundraising

\$ 4,123



## AMA & AMCC Summary Financial Report Period Ended June 30, 2020

The Arizona Multihousing Association and its Subsidiary have a net budget surplus through June 30, 2020 of \$260,518 and is the result of converting membership dues to a calendar year anniversary which includes recognizing deferred revenue as it relates to each month that offsets the monthly dues invoices that are prorated. Management has reviewed the remaining six months of the 2020 budget and is forecasting to still break even. End of year projections include the removal of all remaining in person events, the PPP loan being forgiven, and significant board and staff travel reductions. For presentation purposes, events that have been rescheduled to later in the year to comply with Covid-19 social distancing guidelines, have been moved in the budget respectively while the board approved budgeted amounts remain the same. The year to date variances and end of year forecast numbers will be outlined in the following pages as it relates to each department with comparisons to 2019 where applicable.

- **Membership revenue** is favorable to budget by \$217,741. Approximately \$372,638 of deferred income received in 2019 related to 2020 dues has been recognized through June 30th and \$100,276 remains to be recognized through year end. Based on the budget and immediately deferring new dues relating to 2021, we anticipate ending the year with an approximate favorable variance of \$13,905.
  - **Regular Dues renewals** are favorable to budget by 2%. New dues revenue is unfavorable to budget by \$27,149 and is net of \$12,218 related to 2021 income presently deferred on the balance sheet. Approximately \$72,752 of the 2020 dues billed is related to the .50¢ BGF dues increase and has been redirected to the BGF restricted income.
  - **Associate Dues renewals** are unfavorable to budget by approximately 4% and new dues revenue is also unfavorable by \$14,108 which is net of \$2,668 related to 2021 revenue deferred on the balance sheet.
- **Membership expenses** are favorable to budget by \$7,126 and primarily attributable to reduced travel, printing, and allocated compensation expenses.
- **Membership Non-Dues revenue** is unfavorable to budget by \$8,200. The variance primarily relates to better than budgeted Click & Lease revenue totaling \$13,318, while website advertising and additional listing income fell short by \$17,089 and \$2,155 respectively. Staff continues to work to close that gap as website traffic increases. Click & Lease income is anticipated to continue to exceed budgeted expectations and anticipate that line item's surplus to grow by at least \$5000 more by year end.
- **Membership Non-Dues expenses** are favorable to budget by \$7,065 and is a result of decreased printing, credit card processing fees and allocated compensation.
- **Phoenix Education revenue** is unfavorable by \$21,687 and is \$27,953 or 49% less than June 2019 and is a direct result of CAM being rescheduled to occur in July, class cancellations, and offering free webinars in the second quarter. CAM registration income is presently reserved on the balance sheet, however participation has been reduced by almost 30% due to the in-person classroom experience converting to a less desired virtual experience.



## AMA & AMCC Summary Financial Report Period Ended June 30, 2020

- **Phoenix Education expenses** are favorable by \$10,078 primarily due to the timing of CAM course materials.
- **Tucson Education revenue** is unfavorable to budget by \$1,940 due to less than anticipated participation, class cancellations and free webinars. Expenses are favorable by \$1,421 due to unused location expenses.
- **Events** that were held through June had a net unfavorable variance to budget of \$11,511 and is \$363,715 or 83% less than compared to June 2019.
  - **Phoenix RTS (June)** net income was \$46,136 and \$8,564 less than budget.

### **\*\* Upcoming Events overview for end of year planning:**

- **Tucson RTS (July)** net income was approximately \$20,900 and \$1,500 better than budget.
- **Virtual Trivia** has been added to help fill the growing demand for more social interaction. Net income is anticipated to be approximately \$3,800.
- **Virtual Tribute Awards (August)** was originally budgeted to net \$123,017. Due to pricing and format changes, new projected revenue is forecasted to be \$97,384 or \$25,633 less than budget.
- **AptsUnite Virtual Education Conference (October 10<sup>th</sup>)** has been designed with 3 different learning tracks to meet members' education needs and provide virtual networking opportunities. The projected income for this event is \$88,737 and the net unfavorable impact of cancelling both the Phoenix and Tucson Trade Shows and Perspectives & Projections is \$183,956.

***The Association will make every effort to keep events on the 2020 calendar as long as we are able to comply with the mandated regulations. At this time none of our remaining events meet the current guidelines, and therefore all remaining in person events have been removed from the end of year forecast. The potential loss of income is summarized below:***

- **Phoenix & Tucson Maintenance Mania:** \$60,550, \$20,016
  - **Phoenix & Tucson Golf Tournaments:** \$53,090, \$33,135. As a reminder, both golf tournaments were budgeted for net revenue to be redirected to BGF and was net neutral to the original budget.
  - **Phoenix & Tucson Dinner Meetings:** \$31,289, \$3,533
  - **BGF & PAC Fundraiser:** \$24,000
- **Operations expenses** are unfavorable to budget by \$3,905 and are \$35,608 less than June 2019. Approximately 4% or \$7,000 relates to timing. Details outlining the variances are below:
    - **Compensation & Benefits** are unfavorable to budget by \$5,546 and are \$32,594 higher than June 2019 as a direct result of retaining the PR Firm. The budget variance is primarily due to unused PTO. When PPP loan forgiveness guidelines are finalized, approximately \$104,000 will be applied to the compensation line item.



## AMA & AMCC Summary Financial Report Period Ended June 30, 2020

- **Other Employee related expenses** are favorable to budget by \$11,126 and is related to staff participation at NAA events and employee training.
  - **Board expenses & sponsorships** have a net favorable variance of \$18,068 due to no delegate travel expense reimbursements for June and reduced board meeting expenses.
  - **Occupancy & Related expenses** are unfavorable by \$1,767 primarily due to increased business insurance costs \$2,367, decreased net utility expenses \$3,262, decreased office supplies \$3,290 and increased equipment depreciation \$2,550. The remaining 30% of the PPP loan will reduce the end of year expenses related to rent and utilities resulting in a large favorable variance.
- 
- **Government Affairs** has a favorable variance of \$11,225 primarily due to the timing of dues and sponsorships paid to other organizations. Expenses compared to last year at June 31, 2019 are \$40,486 higher and primarily related to increased compensation allocation of the new PR Firm and Capitol Consulting. As a reminder, the sponsorships line item represents funds that were previously paid out of the BGF that are now funded annually and therefore included in the budget and are no longer paid out of the BGF.
  - **Community Outreach income** has an unfavorable variance of \$8,059 and is primarily attributable to the timing of Project S.A.F.E registrations. Compared to 2019, revenue is down by \$65,359 due to the non-renewal of the Smoke-Free Grant. Expenses are favorable to budget by \$5,958 and is attributable to unused June travel and allocated compensation.
  - **AMCC** net variance is favorable to budget by \$1,368 and is \$2,001 less than 2019. We anticipate a slight year end favorable variance due to a new affinity program by partnering with NAA, HomeDepot Pro and our Associate members.



|   |    |                  |
|---|----|------------------|
| <b>AMA &amp; Subsidiary surplus at June 30, 2020</b>                                  |    | <b>224,844</b>   |
| <b>Board Approved Budget</b>  |    | <b>(35,674)</b>  |
| <b><u>Surplus Detail:</u></b>   |    |                  |
| <b><u>Revenue increase (decrease)</u></b>   |    |                  |
| Regular Dues  | ** | 195,039          |
| Associate Dues  | ** | 26,374           |
| Click & Lease revenue   |    | 13,318           |
| Membership Printing & Bank Fees   |    | 3,718            |
| Additional Listings   |    | (2,155)          |
| Website   |    | (17,089)         |
| Phx & Tuc Education Net   |    | (12,128)         |
| Events  | *  | (11,511)         |
| Crest Affinity Programs   | *  | (1,727)          |
| Project S.A.F.E   | *  | (8,059)          |
| <b><u>Expense (increase) decrease</u></b>   |    |                  |
| Operations Comp & Benefits  |    | (5,546)          |
| NAA Travel  |    | 19,285           |
| Occupancy & Related ( CAM & Utilities and Office Supplies)                            |    | 6,552            |
| Board Sponsorships & Expenses   |    | 18,068           |
| Admin Exp (Bank & CC fees, training, & Misc)  |    | 11,099           |
| Audit   | *  | (6,563)          |
| Legal   |    | 1,740            |
| GA Sponsorships   | *  | 4,687            |
| Variances under \$2,000   |    | 25,414           |
| <b>Budget surplus</b>   |    | <b>260,518</b>   |
| <b>Surplus at June 30, 2020</b>   |    | <b>224,844</b>   |
| <b>Remainder of Board Approved Budget</b>   |    | <b>36,390</b>    |
| <b>Plus (minus) known or anticipated changes beginning July 1 - December 31, 2020</b> |    |                  |
| Membership (Deferred Revenue Adj)   | ** | (203,836)        |
| Membership Non-Dues (Click & Lease)   |    | 5,300            |
| Education   |    | (4,342)          |
| Dinner Meetings (Phx & Tuc)   |    | (27,827)         |
| Tucson Trade Show   |    | (50,678)         |
| Perspectives & Projections  |    | (32,600)         |
| Maintenance Mania (Phx & Tuc)   |    | (80,566)         |
| PAC & BGF Golf Tournaments (Phx & Tuc)  |    | (86,225)         |
| PAC & BGF Fundraiser  |    | (24,000)         |
| PAC & BGF Redirected  |    | 83,090           |
| Difference between Virtual Statewide Apts Unite & Phx Trade Show                      |    | (100,678)        |
| Virtual Tribute Awards  |    | (25,633)         |
| Reverse Trade Show Phx & Tuc surplus  |    | 1,500            |
| Operations ( 150k PPP loan, comp, BOD exp, travel reductions)                         |    | 265,623          |
| Community Outreach Project S.A.F.E  |    | 5,000            |
| AMCC - New Affinity Program   |    | 5,000            |
| <b>variances under \$2000</b>   |    | <b>9,687</b>     |
| <b>Projected increase (decrease) in year end surplus (deficit)</b>                    |    | <b>(261,185)</b> |
| <b>YTD Actuals + Remainder of 2020 Budget +/- changes</b>                             |    | <b>49</b>        |

\* Timing

\*\* The membership dues variance will decrease throughout the year as the result of the annual billing change and recognizing deferred income as it relates to each month as the dues billed each month are prorated. The net change is adjusted in projected increase(decrease) section, as well as other known changes.



# Financial Statements

Six Months Ended June 30, 2020 and 2019

ARIZONA MULTIHOUSING ASSOCIATION & SUBSIDIARY  
STATEMENTS OF FINANCIAL CONDITION  
June 30, 2020 and 2019

|                          | 2020         | 2019         |                                  | 2020         | 2019         |
|--------------------------|--------------|--------------|----------------------------------|--------------|--------------|
| <b>ASSETS:</b>           |              |              | <b>LIABILITIES &amp; EQUITY:</b> |              |              |
| Current Assets -         |              |              | Current Liabilities -            |              |              |
| Cash                     |              |              | Accounts Payable & Credit cards  | \$ 169,357   | \$ 14,300    |
| Wells Fargo - Operating  | \$ 983,374   | \$ 853,524   |                                  |              |              |
| Wells Fargo - AMCC       | 318,102      | 300,477      | Accrued Expenses:                |              |              |
| Other                    | 223          | 298          | Payroll                          | \$ 48,500    | \$ 23,925    |
|                          |              |              | Payroll Liabilities              | \$ 288       | \$ 8,364     |
|                          |              |              | Expenses                         | \$ -         | \$ 26,734    |
| Total Cash               | 1,301,699    | 1,154,299    | Vacation & Other Compensation    | \$ 52,976    | \$ 40,548    |
|                          |              |              | Deferred Rent                    | \$ 10,202    | \$ 7,936     |
| Receivables:             |              |              | Other                            | \$ 1,623     | \$ 388       |
|                          |              |              |                                  |              |              |
|                          |              |              | Deferred Income                  |              |              |
|                          |              |              | Membership                       | \$ 112,588   | \$ 556,227   |
|                          |              |              | Events                           | \$ 474,343   | \$ 70,028    |
|                          |              |              | Other                            | \$ 26,641    | \$ 23,918    |
| Total Receivables        | 140,015      | 231,647      |                                  |              |              |
|                          |              |              | Total Current Liabilities        | \$ 896,518   | \$ 772,368   |
| Prepaid Expenses:        |              |              |                                  |              |              |
| Events                   | 63,338       | 10,837       |                                  |              |              |
| Other                    | 84,240       | 16,436       |                                  |              |              |
|                          |              |              |                                  |              |              |
| Total Prepaid Assets     | 147,578      | 27,273       | Long Term Liabilities -          |              |              |
|                          |              |              | Restricted Funds                 | \$ 921,139   | \$ 369,677   |
|                          |              |              |                                  |              |              |
| Other Current Assets:    |              |              |                                  |              |              |
|                          |              |              |                                  | \$ 921,139   | \$ 369,677   |
|                          | -            | -            | Total Liabilities                | \$ 1,817,657 | \$ 1,142,045 |
|                          |              |              |                                  |              |              |
| Total Current Assets     | 1,589,292    | 1,413,219    |                                  |              |              |
|                          |              |              |                                  |              |              |
| Property & Equipment -   |              |              | Equity -                         |              |              |
| Property & Equipment     | 144,454      | 124,525      | Capital Stock                    | \$ 10,000    | \$ 10,000    |
| Accumulated Depreciation | (93,198)     | (88,664)     | Intercompany Balances            | \$ (20,222)  | \$ (12,906)  |
|                          |              |              |                                  |              |              |
| Net Property & Equipment | 51,256       | 35,861       | Unrestricted Equity              |              |              |
|                          |              |              | Beginning Balance                | \$ 1,697,818 | \$ 1,335,452 |
| Other Assets -           |              |              | Net Income (Loss)                | \$ 224,844   | \$ 446,190   |
| Investments              | 1,705,541    | 1,046,850    | Investment Income                | \$ (206,539) | \$ (62,437)  |
| Restricted Cash - BGF    | 167,470      | 352,414      |                                  |              |              |
| Other                    | 10,000       | 10,000       |                                  |              |              |
|                          |              |              | Total Unrestricted Equity        | \$ 1,716,123 | \$ 1,719,205 |
|                          |              |              |                                  |              |              |
| Total Other Assets       | 1,883,011    | 1,409,264    | Total Equity                     | \$ 1,705,901 | \$ 1,716,299 |
|                          |              |              |                                  |              |              |
| Total Assets             | \$ 3,523,559 | \$ 2,858,344 | Total Liabilities & Equity       | \$ 3,523,558 | \$ 2,858,344 |

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**ARIZONA MULTIHOUSING ASSOCIATION & SUBSIDIARY**  
**STATEMENT OF ACTIVITIES / REVENUES AND EXPENSES**  
**Six Months Ended June 30, 2020 and 2019**

|   | 2020 Actual  | Board Approved Budget | Favorable (Unfavorable) | Percentage |            | Prior Year - Actual | Favorable (Unfavorable) | Percentage |
|---|--------------|-----------------------|-------------------------|------------|------------|---------------------|-------------------------|------------|
|   |              |                       |                         |            |            |                     |                         |            |
| Income                                      |              |                       |                         |            |            |                     |                         |            |
| Membership (pg 4)                           | \$ 1,027,491 | \$ 809,750            | \$ 217,741              | 26.89 %    | \$ 792,668 | \$ 234,823          | 29.62 %                 |            |
| Membership Non-Dues (pg 6)                  | 194,033      | 202,233               | (8,200)                 | (4.05)     | 199,836    | (5,803)             | (2.90)                  |            |
| Education - Net of Direct Expenses (pg 7-8) | 17,491       | 29,619                | (12,128)                | (40.95)    | 40,736     | (23,245)            | (57.06)                 |            |
| Events - Net of Direct Expenses (pg 9-15)   | 72,915       | 84,426                | (11,511)                | (13.63)    | 436,630    | (363,715)           | (83.30)                 |            |
|   |              |                       |                         |            |            |                     |                         |            |
|   | 1,311,930    | 1,126,029             | 185,901                 | 16.51      | 1,469,870  | (157,940)           | (14.03)                 |            |
|   |              |                       | 0.00                    |            |            | -                   |                         |            |
| Expenses                                    |              |                       |                         |            |            |                     |                         |            |
| Membership (pg 5)                           | 187,436      | 194,562               | 7,126                   | 3.66       | 177,763    | (9,673)             | (5.44)                  |            |
| Membership Non-Dues (pg 6)                  | 75,801       | 82,866                | 7,065                   | 8.53       | 64,495     | (11,306)            | (17.53)                 |            |
| Education Compensation (pg 7-8)             | 53,300       | 54,462                | 1,162                   | 2.13       | 52,079     | (1,221)             | (2.34)                  |            |
| Events (pg 15) - net                        | 201,022      | 253,699               | 52,677                  | 20.76      | 192,332    | (8,690)             | (4.52)                  |            |
| Operations (pg 16-17)                       | 189,585      | 185,680               | (3,905)                 | (2.10)     | 225,193    | 35,608              | 15.81                   |            |
| Government Affairs (pg 18)                  | 294,860      | 306,085               | 11,225                  | 3.67       | 254,374    | (40,486)            | (15.92)                 |            |
| Community Outreach (pg 19)                  | 43,422       | 41,321                | (2,101)                 | (5.08)     | 17,785     | (25,637)            | (144.15)                |            |
|   |              |                       |                         |            |            |                     |                         |            |
|   | 1,045,426    | 1,118,674             | 73,248                  | 6.55       | 984,021    | (61,405)            | (6.24)                  |            |
|   |              |                       | 0.00                    |            |            | -                   |                         |            |
|   | 266,504      | 7,354                 | 259,150                 | 3,523.76   | 485,849    | (219,345)           | (45.15)                 |            |
| Other Income (Expense):                     |              |                       |                         | N/A        |            |                     |                         |            |
| AMCC - Surplus (Deficit) (pg 20)            | (41,660)     | (43,028)              | 1,368                   | 3.18       | (39,659)   | (2,001)             | (5.05)                  |            |
|   |              |                       | (0.00)                  |            |            | -                   |                         |            |
| Total Other Income (Expense)                | (41,660)     | (43,028)              | 1,368                   | 3.18       | (39,659)   | (2,001)             | 5.05                    |            |
| Revenues in Excess of Expenses (deficit)    | \$ 224,844   | \$ (35,674)           | \$ 260,518              | %          | \$ 446,190 | \$ (221,346)        | (49.61) %               |            |
|   |              |                       | (0.00)                  |            |            | -                   |                         |            |

ARIZONA MULTIHOUSING ASSOCIATION & SUBSIDIARY  
STATEMENT OF CASH FLOWS  
Six Months Ended June 30, 2020 and 2019

RECONCILIATION OF WORKING CAPITAL ITEMS

|   | 2020            | 2019            |
|---|-----------------|-----------------|
| <u>CASH FLOWS FROM OPERATING ACTIVITIES:</u>        |                 |                 |
| Net Income (Loss)                                   | \$ 224,844.00   | \$ 446,190.00   |
| Adjustments to reconcile Net Income to Net Cash     |                 |                 |
| Depreciation & Amortization                         | 13,584.00       | 14,615.00       |
| Net Change in Operating Assets                      | (111,792.00)    | 195,874.00      |
| Net Change in Operating Liabilities                 | 670,508.00      | (46,586.00)     |
| NET CASH PROVIDED BY (USED IN) OPERATING ACTIVITIES | 797,144.00      | 610,093.00      |
| <u>CASH FLOWS FROM INVESTING ACTIVITIES:</u>        |                 |                 |
| Investments   | (293,461.00)    | (237,564.00)    |
| Investment Income - Directly to Equity              | (206,539.00)    | (62,437.00)     |
| Property & Equipment                                | (10,480.00)     | (12,898.00)     |
| (Increase) Restricted Cash                          | (71,741.00)     | (187,404.00)    |
| NET CASH PROVIDED BY (USED IN) INVESTING ACTIVITIES | (582,221.00)    | (500,303.00)    |
| <u>CASH FLOWS FROM FINANCING ACTIVITIES:</u>        |                 |                 |
| Change in Intercompany Balance - net                | (4,703.00)      | (3,400.00)      |
| NET CASH PROVIDED BY (USED IN) FINANCING ACTIVITIES | (4,703.00)      | (3,400.00)      |
| <u>NET INCREASE (DECREASE) IN CASH</u>              | 210,220.00      | 106,390.00      |
| CASH BALANCE:                                       |                 |                 |
| BEGINNING BALANCE                                   | 1,091,479.00    | 1,047,909.00    |
| ENDING BALANCE                                      | \$ 1,301,699.00 | \$ 1,154,299.00 |

|   | 2020            | 2019           |
|---|-----------------|----------------|
| NET (INCREASE) DECREASE IN ASSETS:      |                 |                |
| Receivables -                           |                 |                |
| Net Receivables                         | (15,748.00)     | 130,566.00     |
| Prepays:                                |                 |                |
| Events                                  | (23,772.00)     | 22,209.00      |
| Other                                   | (72,272.00)     | 43,099.00      |
| Other Assets                            | -               | -              |
| Net Change in Operating Assets          | \$ (111,792.00) | \$ 195,874.00  |
| NET INCREASE (DECREASE) IN LIABILITIES: |                 |                |
| Accounts Payable & Credit cards         | \$ 107,552.00   | \$ (45,971.00) |
| Accrued Expenses:                       |                 |                |
| Payroll                                 | 45,743.00       | 21,672.00      |
| Payroll Liabilities                     | (2,080.00)      | 8,364.00       |
| Expenses                                | (704.00)        | 23,968.00      |
| Vacation & Other Compensation           | 12,241.00       | 12,479.00      |
| Deferred Rent                           | 567.00          | 2,267.00       |
| Other                                   | (3,273.00)      | (88.00)        |
| Deferred Revenue:                       |                 |                |
| Membership                              | (359,831.00)    | (196,893.00)   |
| Events                                  | 386,225.00      | (27,151.00)    |
| Other                                   | 21,991.00       | (38,478.00)    |
| Long term Liabilities:                  | -               | -              |
| Restricted Funds                        | 462,077.00      | 193,245.00     |
| Net Change in Operating Liabilities     | \$ 670,508.00   | \$ (46,586.00) |
| Net Change in Working Capital           | \$ 558,716.00   | \$ 149,288.00  |

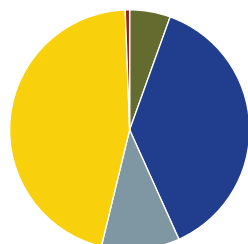
## Portfolio Performance Summary

As of June 30, 2020

**Primary Benchmark**  
S&P 500 TR USD

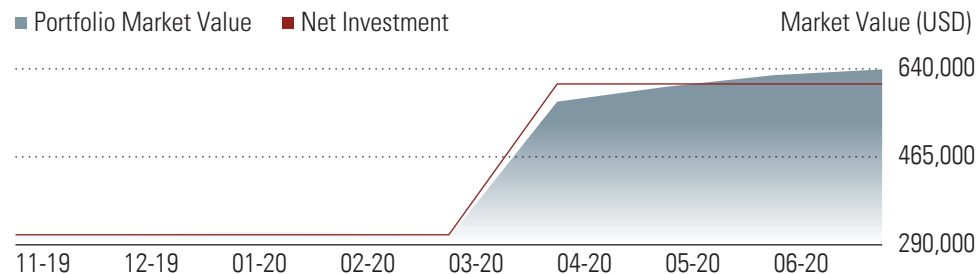
**Return Type**  
Time-Weighted Rate of  
Return (TWR)

### Asset Allocation



| Asset Class            | Portfolio % |
|------------------------|-------------|
| Cash                   | 5.48        |
| US Equities            | 37.78       |
| International Equities | 10.52       |
| Fixed Income           | 45.63       |
| Other                  | 0.58        |

### Portfolio Growth



values are as of month end\*

|                                | QTD<br>4/1/2020 - 6/30/2020 | YTD<br>1/1/2020 - 6/30/2020 | 1-Yr<br>7/1/2019 - 6/30/2020 | 3-Yr<br>7/1/2017 - 6/30/2020 | 5-Yr<br>7/1/2015 - 6/30/2020 | 10-Yr<br>7/1/2010 - 6/30/2020 | Since Perf Start<br>11/20/2019 - 6/30/2020 |
|--------------------------------|-----------------------------|-----------------------------|------------------------------|------------------------------|------------------------------|-------------------------------|--|
| <b>Portfolio Return (%)</b>    | <b>11.18</b>                | <b>-3.48</b>                | —                            | —                            | —                            | —                             | <b>-1.66</b>                               |
| S&P 500 TR USD (%)             | 20.54                       | -3.08                       | 7.51                         | 10.73                        | 10.72                        | 13.99                         | 0.59                                       |
| BBgBarc US Agg Bond TR USD (%) | 2.90                        | 6.14                        | 8.74                         | 5.32                         | 4.30                         | 3.82                          | 6.28                                       |
| MSCI ACWI Ex USA NR USD (%)    | 16.12                       | -11.00                      | -4.80                        | 1.13                         | 2.26                         | 4.97                          | -7.75                                      |

### Portfolio Changes

|                                  |            |            |   |   |   |   |            |
|----------------------------------|------------|------------|---|---|---|---|------------|
| Beginning Value (USD)            | 574,711.87 | 315,844.58 | — | — | — | — | 310,000.00 |
| Beginning Accrued Interest (USD) | 0.00       | 0.00       | — | — | — | — | 0.00       |
| Net Cash Flow (USD)              | 0.00       | 300,000.00 | — | — | — | — | 300,000.00 |
| Cash In (USD)                    | 0.00       | 300,000.00 | — | — | — | — | 300,000.00 |
| Cash Out (USD)                   | 0.00       | 0.00       | — | — | — | — | 0.00       |
| Investment G/L plus Income (USD) | 64,247.01  | 23,114.29  | — | — | — | — | 28,958.88  |
| Ending Value (USD)               | 638,958.88 | 638,958.88 | — | — | — | — | 638,958.88 |
| Ending Accrued Interest (USD)    | 0.00       | 0.00       | — | — | — | — | 0.00       |

As of June 30, 2020 you have Funds Available of \$12,035.35.

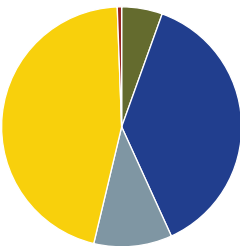
Portfolio Performance Summary

As of June 30, 2020

Primary Benchmark  
S&P 500 TR USD

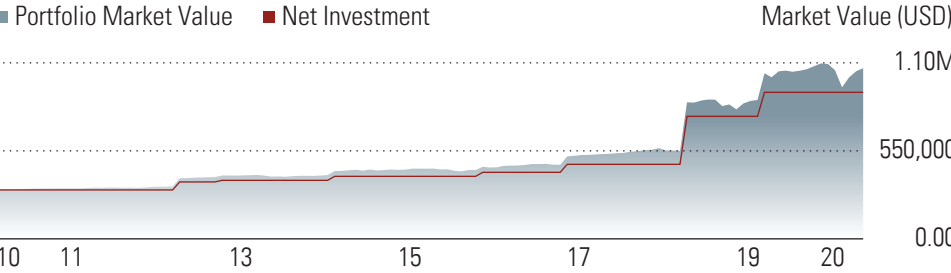
Return Type  
Time-Weighted Rate of  
Return (TWR)

Asset Allocation



| Asset Class            | Portfolio % |
|------------------------|-------------|
| Cash                   | 5.49        |
| US Equities            | 37.71       |
| International Equities | 10.54       |
| Fixed Income           | 45.68       |
| Other                  | 0.58        |

Portfolio Growth



values are as of month end\*

|                                | QTD<br>4/1/2020 - 6/30/2020 | YTD<br>1/1/2020 - 6/30/2020 | 1-Yr<br>7/1/2019 - 6/30/2020 | 3-Yr<br>7/1/2017 - 6/30/2020 | 5-Yr<br>7/1/2015 - 6/30/2020 | 10-Yr<br>7/1/2010 - 6/30/2020 | Since Perf Start<br>4/1/2010 - 6/30/2020 |
|--------------------------------|-----------------------------|-----------------------------|------------------------------|------------------------------|------------------------------|-------------------------------|--|
| Portfolio Return (%)           | 12.62                       | -2.71                       | 1.88                         | 3.58                         | 3.04                         | 2.63                          | 2.69                                     |
| S&P 500 TR USD (%)             | 20.54                       | -3.08                       | 7.51                         | 10.73                        | 10.72                        | 13.99                         | 12.29                                    |
| BBgBarc US Agg Bond TR USD (%) | 2.90                        | 6.14                        | 8.74                         | 5.32                         | 4.30                         | 3.82                          | 4.08                                     |
| MSCI ACWI Ex USA NR USD (%)    | 16.12                       | -11.00                      | -4.80                        | 1.13                         | 2.26                         | 4.97                          | 3.50                                     |

Portfolio Changes

|                                  |              |              |              |              |              |              |              |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Beginning Value (USD)            | 947,054.57   | 1,096,235.26 | 1,046,849.27 | 531,461.48   | 433,739.66   | 309,373.69   | 305,558.79   |
| Beginning Accrued Interest (USD) | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         |
| Net Cash Flow (USD)              | 0.00         | 0.00         | 0.00         | 450,000.00   | 525,000.00   | 610,000.12   | 610,176.90   |
| Cash In (USD)                    | 0.00         | 0.00         | 0.00         | 450,000.00   | 525,000.00   | 710,000.12   | 710,176.90   |
| Cash Out (USD)                   | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 100,000.00   | 100,000.00   |
| Investment G/L plus Income (USD) | 119,527.15   | -29,653.54   | 19,732.46    | 85,120.24    | 107,842.06   | 147,207.91   | 150,846.03   |
| Ending Value (USD)               | 1,066,581.72 | 1,066,581.72 | 1,066,581.72 | 1,066,581.72 | 1,066,581.72 | 1,066,581.72 | 1,066,581.72 |
| Ending Accrued Interest (USD)    | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         |

As of June 30, 2020 you have Funds Available of \$20,072.26.

For a detailed explanation of the indices, as selected by your Financial Advisor, please refer to the Reference Guide section of this report.

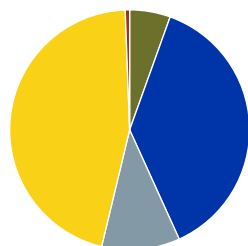
## Portfolio Performance Summary

As of June 30, 2020

**Primary Benchmark**  
S&P 500 TR USD

**Return Type**  
Time-Weighted Rate of  
Return (TWR)

### Asset Allocation



Asset Class

Cash

US Equities

International Equities

Fixed Income

Other

Portfolio %

5.49

37.74

10.53

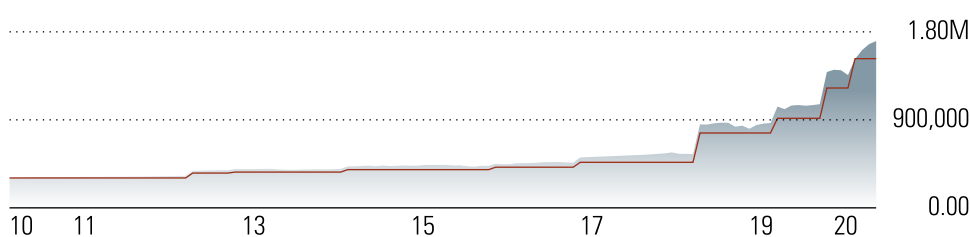
45.66

0.58

### Portfolio Growth

Portfolio Market Value   Net Investment

Market Value (USD)



values are as of month end\*

|                                | QTD<br>4/1/2020 - 6/30/2020 | YTD<br>1/1/2020 - 6/30/2020 | 1-Yr<br>7/1/2019 - 6/30/2020 | 3-Yr<br>7/1/2017 - 6/30/2020 | 5-Yr<br>7/1/2015 - 6/30/2020 | 10-Yr<br>7/1/2010 - 6/30/2020 | Since Perf Start<br>4/1/2010 - 6/30/2020 |
|--------------------------------|-----------------------------|-----------------------------|------------------------------|------------------------------|------------------------------|-------------------------------|--|
| <b>Portfolio Return (%)</b>    | <b>12.08</b>                | <b>-3.03</b>                | <b>1.52</b>                  | <b>3.46</b>                  | <b>2.96</b>                  | <b>2.59</b>                   | <b>2.65</b>                              |
| S&P 500 TR USD (%)             | 20.54                       | -3.08                       | 7.51                         | 10.73                        | 10.72                        | 13.99                         | 12.29                                    |
| BBgBarc US Agg Bond TR USD (%) | 2.90                        | 6.14                        | 8.74                         | 5.32                         | 4.30                         | 3.82                          | 4.08                                     |
| MSCI ACWI Ex USA NR USD (%)    | 16.12                       | -11.00                      | -4.80                        | 1.13                         | 2.26                         | 4.97                          | 3.50                                     |

### Portfolio Changes

|                                  |              |              |              |              |              |              |              |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Beginning Value (USD)            | 1,521,766.44 | 1,412,079.84 | 1,046,849.27 | 531,461.48   | 433,739.66   | 309,373.69   | 305,558.79   |
| Beginning Accrued Interest (USD) | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         |
| Net Cash Flow (USD)              | 0.00         | 300,000.00   | 610,000.00   | 1,060,000.00 | 1,135,000.00 | 1,220,000.12 | 1,220,176.90 |
| Cash In (USD)                    | 0.00         | 300,000.00   | 610,000.00   | 1,060,000.00 | 1,135,000.00 | 1,320,000.12 | 1,320,176.90 |
| Cash Out (USD)                   | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 100,000.00   | 100,000.00   |
| Investment G/L plus Income (USD) | 183,774.16   | -6,539.24    | 48,691.33    | 114,079.12   | 136,800.94   | 176,166.79   | 179,804.91   |
| Ending Value (USD)               | 1,705,540.60 | 1,705,540.60 | 1,705,540.60 | 1,705,540.60 | 1,705,540.60 | 1,705,540.60 | 1,705,540.60 |
| Ending Accrued Interest (USD)    | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         | 0.00         |

As of June 30, 2020 you have Funds Available of \$32,107.61.



# AMAPAC

Reid Butler, Chairman

## Campaign Finance Report

All campaign finance reports are current with the Secretary of State.

- Current Secretary of State Balance: \$22,964.64 as of July 15, 2020

Balances as of June 30, 2020 are as follows:

- BGF RBC Investment Account balance: \$638,959
- BGF Cash in Alliance Bank: \$167,470
- BGF voluntary contributions and \$.50 dues increase (includes both collected and outstanding invoice balances pending final settlement) estimated total: \$135,251
- Total BGF : \$941,680
- PAC Alliance Bank Balance: \$24,430

Variance between Alliance Bank and Secretary of State balances due to contributions made to candidates after the last Secretary of State reporting cycle.



## Campaign Finance Report

AZ MULTIHOUSING ASSN PAC  
Committee #: 1129

Treasurer: Carlson, John  
818 N 1st St, Phoenix, AZ 85004  
Phone: (602) 296-6200  
Email: ekowalski@azmultihousing.org

### 2020 Q2 Report

Election Cycle: 2020  
Date Filed: July 15, 2020  
Reporting Period: May 3, 2020-June 30, 2020

### Summary of Finances

|   |             |
|---|-------------|
| Cash Balance at Beginning of Reporting Period:  | \$24,168.89 |
| Total Cash Receipts this Reporting Period:      | \$0.00      |
| Total Cash Disbursements this Reporting Period: | \$1,204.25  |
| Cash Balance at End of Reporting Period:        | \$22,964.64 |

Report ID: 209411



# 2020 AMA Board Challenge

| Last Name    | First Name | Company Name                       | 2017<br>Contribution | 2018<br>Contributions | 2019<br>Contributions | 2020<br>Challenge | AMAPAC   | BGF       | NAAPAC |
|--------------|------------|------------------------------------|----------------------|-----------------------|-----------------------|-------------------|----------|-----------|--------|
| Pacheco      | Kim        | Scotia Group Management            | \$ 1,000             | \$ 1,000              | \$ 1,000              | \$ 6,758          |          | \$ 6,758  |        |
| Butler       | Reid       | Butler Housing Company             | \$ 1,000             | \$ 1,000              | \$ 1,000              | \$ 1,000          |          |           |        |
| Hines        | Scott      | PEM Real Estate Group              | \$ 1,010             | \$ 1,100              | \$ 1,210              | \$ -              |          |           |        |
| Coburn       | Linda      | NexMetro                           |                      | \$ 1,000              | \$ 1,000              | \$ -              |          |           |        |
| Carlson      | John       | Mark-Taylor Residential            | \$ 2,100             | \$ 2,000              | \$ 2,000              | \$ 10,000         |          | \$ 10,000 |        |
| Campbell     | Sue        | Redi Carpet                        |                      | \$ -                  |                       | \$ -              |          |           |        |
| Beaulieu     | Elizabeth  | Quarterpenny Management            | \$ 100               | \$ 500                | \$ 1,100              | \$ 5,000          |          | \$ 5,000  |        |
| Beckstead    | Krisanne   | Picerne Real Estate Group          | \$ 1,050             | \$ 1,000              | \$ 1,000              | \$ 3,000          |          | \$ 3,000  |        |
| Brice        | Lesley     | MC Residential                     | \$ 1,200             | \$ 1,250              | \$ 1,000              | \$ 1,300          |          | \$ 1,300  |        |
| Brown        | Dahnn      | Camden Property Trust              |                      |                       |                       | \$ 675            |          | \$ 675    |        |
| Bruscini     | Luz        | MEB Management Services            |                      |                       |                       | \$ -              |          |           |        |
| Connant      | David      | Valley Wide Security               |                      |                       |                       | \$ -              |          |           |        |
| DeHoag       | Crystal    | Bella Investments                  |                      |                       | \$ 500                | \$ 10,500         |          | \$ 10,500 |        |
| DiSabato     | Anna       | Dunlap & Magee Property Management |                      |                       | \$ 1,000              | \$ 1,000          |          | \$ 1,000  |        |
| Eisenhour    | Kohl       | Avenue 5 Residential               |                      | \$ -                  | \$ 1,000              | \$ -              |          |           |        |
| Evans        | Natalie    | CoStar                             |                      | \$ -                  | \$ 1,000              | \$ 9,000          |          | \$ 2,000  |        |
| Fitch        | Kimberly   | Nicolosi & Fitch, Inc              | \$ 10                | \$ 1,000              | \$ 2,000              | \$ -              |          |           |        |
| Greco        | Adam       | Burns Pest Elimination             | \$ 1,020             | \$ 1,000              | \$ 1,000              | \$ 3,650          |          | \$ 2,050  |        |
| Griggs       | Shelly     | Avanti                             | \$ 525               | \$ -                  | \$ 800                | \$ -              |          |           |        |
| Heiple       | Kristin    | Baron                              |                      |                       | \$ 800                | \$ 1,450          |          | \$ 1,450  |        |
| Hicks        | Robert     | Alliance Residential               | \$ 1,250             | \$ 1,000              |                       | \$ 2,250          |          | \$ 2,250  |        |
| Hogue        | Stacey     | Greystar Real Estate Partners      |                      | \$ -                  |                       | \$ -              |          |           |        |
| Howland      | Michelle   | Blue Steel Security                |                      |                       |                       | \$ 3,100          |          | \$ 3,100  |        |
| Knowles      | Susan      | JR McDade                          |                      |                       | \$ 1,000              | \$ -              |          |           |        |
| Koglmeier    | Matt       | Koglmeier Law Group PLC            |                      |                       | \$ 3,000              | \$ 5,000          |          | \$ 5,000  |        |
| Kotin        | David      | Kay-Kay Realty                     | \$ 1,110             | \$ 1,000              |                       | \$ 4,000          |          | \$ 3,000  |        |
| Kuhlman      | Sharon     | Shelton Residential                |                      |                       |                       | \$ -              |          |           |        |
| Lacey        | Dustin     | Mark-Taylor Residential            |                      | \$ 1,000              | \$ 1,000              | \$ -              |          |           |        |
| Litzau       | Crystal    | Weidner                            |                      |                       |                       | \$ -              |          |           |        |
| Mireles      | Omar       | HSL Asset Management               | \$ 1,000             | \$ 1,000              | \$ 1,000              | \$ 30,000         |          | \$ 30,000 |        |
| Morris       | April      | Cox Communications                 | \$ 10                | \$ -                  | \$ 350                | \$ -              |          |           |        |
| Munoz        | Gloria     | Maricopa County Housing            | \$ 150               | \$ -                  |                       | \$ -              |          |           |        |
| Osborn-Warne | Lisa       | Priderock Capital Partners         |                      |                       | \$ 500                | \$ -              |          |           |        |
| Rials        | John       | Western Wealth Capital             | \$ 500               | \$ 750                | \$ 1,450              | \$ -              |          |           |        |
| Rosenfeld    | Lisa       | HSL Asset Management               | \$ 100               | \$ -                  | \$ 1,000              | \$ -              |          |           |        |
| Schilling    | Mark       | MEB Management Services            | \$ 1,100             | \$ 1,100              | \$ 1,500              | \$ 1,500          | \$ 1,500 |           |        |
| Schreiber    | Tina       | Alliance Residential               |                      | \$ -                  |                       | \$ 1,250          |          | \$ 1,250  |        |
| Searl        | Stacey     | Weidner                            |                      |                       | \$ 150                | \$ -              |          |           |        |
| Shiple       | Christine  | Dunlap & Magee Property Management | \$ 1,010             | \$ -                  | \$ 1,000              | \$ 450            |          | \$ 450    |        |
| Sinclair     | Michelle   | Evergreen Devco, Inc               | \$ 150               | \$ -                  |                       | \$ -              |          |           |        |
| Steltenphol  | Justin     | P.B. Bell Companies                |                      | \$ 1,000              | \$ 1,000              | \$ 1,000          |          | \$ 1,000  |        |
| Stobart      | Greg       | MG Properties                      |                      |                       |                       | \$ -              |          |           |        |
| Suggs        | Carmen     | ConAm                              |                      |                       |                       | \$ -              |          |           |        |
| Vanek        | David      | Greystar Real Estate Partners      |                      |                       |                       | \$ -              |          |           |        |
| Verger       | Luis       | Shelton Residential                | \$ 150               | In-Kind               |                       | \$ -              |          |           |        |
| Weiske       | Wendy      | Gorman & Company                   |                      |                       |                       | \$ 1,000          |          |           |        |
| Willis       | Debbie     | P.B. Bell Companies                | \$ 1,010             | \$ 1,000              | \$ 1,000              | \$ 1,000          |          | \$ 1,000  |        |
| Wooder       | Rhonda     | Stratton Restoration               |                      |                       |                       | \$ 1,000          |          | \$ 1,000  |        |
| Worrell      | Chris      | GPM Landscape                      |                      |                       |                       | \$ 2,000          |          | \$ 2,000  |        |
| Wray         | Nicole     | Greystar Real Estate Partners      | \$ 20                | \$ 3,550              | \$ 1,250              | \$ -              |          |           |        |
|              |            |                                    |                      |                       | \$ 32,610             | 106,883           | 1,500    | 93,783    | -      |

## Non-Board Challenge Participants

| Last Name     | First Name | Company Name                  | 2017<br>Contribution | 2018<br>Contributions | 2019<br>Contribution | 2020<br>Challenge | AMAPAC | BGF      | NAAPAC |
|---------------|------------|-------------------------------|----------------------|-----------------------|----------------------|-------------------|--------|----------|--------|
| LeVinus       | Courtney   | Capitol Consulting/AMA        | \$ 1,000             | \$ 1,000              | \$ 1,000             | \$ 1,000          |        | \$ 1,000 |        |
| Clow          | Mike       | Greystar Real Estate Partners |                      | \$ 5,000              | \$ 5,000             |                   |        |          |        |
| Evans         | Chris      | HSL Asset Management          | \$ 2,000             | \$ 10,000             | \$ 5,000             |                   |        |          |        |
| Smith Montoya | Amy        | Bella Investments             | \$ 3,803             | \$ 5,000              | \$ 5,000             |                   |        |          |        |
|               |            |                               |                      |                       |                      | \$ 1,000          | \$ -   | \$ 1,000 | \$ -   |

# AMCF Big Hearts

## Michelle Sinclair & Tina Greco, Phoenix Co-Chairs

## Linda Morales, Tucson Chair

## Natalie Evans, Tucson Vice Chair

### Statewide

The AMCF Phoenix & Tucson committee chairs are now participating in the AMCF board meetings.

### Julie Hurst and Steve Peters Education Fund Scholarship

The application deadline was May 15, 2020. This is the third year for the Julie Hurst and Steve Peters Education Scholarship Funding. Five recipients are being awarded this year. Madison Furnas and Burke Wood were awarded last year and they met the qualifications again this year and are being awarded. In addition, three new recipients Katlyn Wilcox, Macy Danjou and Melodie Bridges qualified and are being awarded as well. The scholarship is administered through the Arizona Community Foundation (ACF). Each recipient awarded will receive \$1,500.

### Phoenix

- Total Net Funds Raised to date are \$6,948.00
- The AMCF Phoenix beneficiaries awarded this year with funds raised in 2019 are UMOM (\$23,838), Autism Speaks (\$11,919) and SARRC (\$11,919) and the Julie Hurst and Steve Peters Education Scholarship Fund (\$4,500). The donation checks were mailed out earlier in the month of July. In return for the donation checks and in compliance with COVID social distancing, we asked for short videos from our beneficiaries to be made and emailed to us so we can share on our social media channels since we were unable to deliver the checks in person.
- AMCF Phoenix and Tucson are now using the Give Lively (free) software program. Here we will be able to promote our events, sell car raffle tickets, etc.
- Due to the impact of Covid, the annual Dollar a Door campaign will be electronic this year. For those management companies that want to participate they will be able to utilize their property software program and ask resident to round up their rent payment and donate the change.
- “Be the Change” – AMCF Big Hearts was inspired by the video SARRC did in lieu of their annual community breakfast that we will be creating our own video called “Be The Change.” This video will feature short clips by guest speakers from UMOM, Autism Speaks and SARRC. We will also feature, come committee members as to why they fundraise for these causes and two recipients from the Julie Hurst & Steve Peters Scholarship Fund. The scholarship recipients will speak about how the funding has helped them. When the video is complete, we will schedule a viewing party so communities and members can still see that there is a need to fundraise this year.
- In place of our First Friday Art Walk’s the committee has decided to do First Friday Bingo and Trivia game nights starting with the first Friday on September 4<sup>th</sup>.
- At the AMA Phoenix Holiday/Dinner Meeting mixer is tentatively scheduled for Tuesday, December 8<sup>th</sup>, we will be drawing the winning raffle ticket of for the 2012 Black BMW 3 Series that Kwik Tow is graciously donated this year. If, the dinner does not take place, we will move the drawing to the January 2021 Phoenix Dinner Meeting.

### Save the Date – 2020 Remaining Activities

- September 19, 2020 – UMOM Flip Flop Walk at the Phoenix Zoo. **Update-** UMOM has now changed this Walk to a Virtual Scavenger Hunt.
- October 18, 2020 – Autism Speaks/SARRC Walk at Sloan Mesa Park
- December 8, 2020 – AMA Phoenix Holiday/Dinner Mixer at the Phoenix County Club
- December 11, 2020 – Phoenix AMCF Bowl-a-thon – Tentative

## **AMCF/Big Hearts (Tucson)**

**Linda Morales, Chair**

**Natalie Evans, Vice Chair**

Total Net Funds Raised to date are \$4,123.00. AMCF Big Hearts Tucson beneficiaries for 2020 include the Julie Hurst Scholarship Fund, Our Family Services, Tucson Homeless Connect, Primavera Foundation and Center for Opportunity.

- The AMCF Tucson beneficiaries being awarded this year with funds raised in 2019 are Our Family Services (\$49,307), Tucson Homeless Connect (\$3,000) and the Julie Hurst and Steve Peters Education Scholarship Fund (\$1,500). The checks were mailed out in early July.
- The 3<sup>rd</sup> Annual Family Fun Rainbow Run was held on February 15<sup>th</sup>. Net funds raised was \$3,866.22
- The committee re-scheduled the Tucson Bowl-A-Thon originally planned for September 18<sup>th</sup> to December 10<sup>th</sup>.
- The committee is planning on fundraising through the El Tour de Tucson group ride scheduled for November 21<sup>st</sup>.
- The committee will continue to sell Jim Click Tickets and Rocky Point Condo Raffle Tickets this year.
- The committee is utilizing Give Lively to fundraise for the dollar-a-door campaign by using text to give and an online giving peer to peer fundraising platform.
- On August 13<sup>th</sup>, the committee is hosting it's first virtual BINGO night to raise money for AMCF.

### **Save the Date - 2020 Fundraising Activities**

- August 13, 2020- Virtual BINGO Night
- November 21, 2020 – El Tour de Tucson
- December 10, 2020 – Tucson Bowl-A-Thon

**Government Affairs**  
John Carlson, Phoenix Chair  
Chris Evans, Tucson Chair

See separate report.

## **Membership**

**Michelle Jenson, Chair and Chris Worrell, Co-Chair**

The Membership Committee decided at the May 13<sup>th</sup> meeting to postpone the membership drive for 2020 until Spring of 2021. The Committee will now focus their efforts on touching base with new members at their six-month anniversary to answer questions and encourage them to join a committee or attend a virtual event.

The Committee hosted a virtual new member meeting on August 12<sup>th</sup> and facilitated mentor relationships through break-out rooms in Zoom.

AMA membership is holding strong despite COVID-19. As of July 29<sup>th</sup>, the AMA has a total of 294,060 units in membership. Associate membership has decreased from 527 to 486; however, AMA staff anticipated this decrease due to lack of in-person events and regular members cutting back on spending. The membership goal for 2020 is to hit 300,000 units.

## **Affinity Programs**

A new affinity program has been added as encouraged through the NAA Open Door Program. Home Depot is now offering a 2 percent rebate to all members who spend over \$25k annually and who have a Pro Extra account. The AMA will receive .5 percent of total spending for members who have a Pro Extra account. Based on 2019 spending, the AMA can expect to receive \$12k as a profit share. Communication announcing this program will go out to members at the beginning of August as well as information will be provided to new members when they join.

## **Crest Insurance Group**

The insurance program is proving to be popular with members. If your policy renews soon, please contact Crest for a quote. Crest has partnered with a carrier to provide discounts between 3%-7% for smoke-free properties.

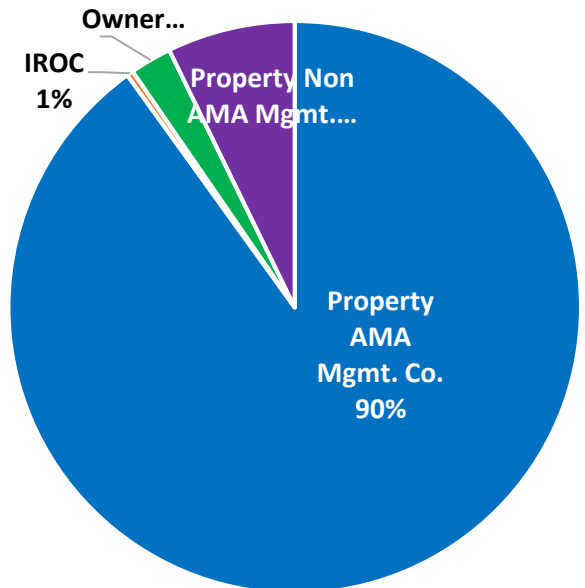
## **Patron Program**

AMA staff has added a new platinum patron as of June 15<sup>th</sup> and is currently working with two associates interested in becoming patron this year.

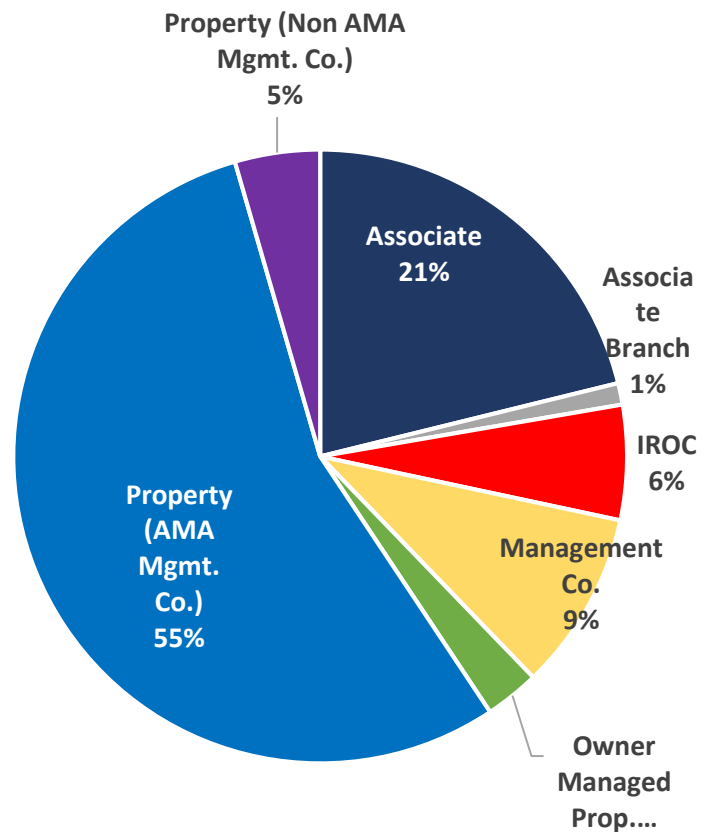
Sponsorships are available for our 2020 events and we have two sponsorships left for our annual Tribute Awards. We are working with all companies to develop sponsor programs to fit any budget. Please contact Sarah Fluke or Michelle Rill for more information.

## Membership as of 8/12/2020

|                              |              |
|------------------------------|--------------|
| <b>Total AMA Members</b>     | <b>2,313</b> |
| Associate                    | 486          |
| Associate Branch             | 26           |
| IROC                         | 139          |
| Management Co.               | 217          |
| Owner Managed Prop.          | 66           |
| Property (AMA Mgmt. Co.)     | 1,260        |
| Property (Non AMA Mgmt. Co.) | 103          |



|                                  |                |
|----------------------------------|----------------|
| <b>Total Units In Membership</b> | <b>294,060</b> |
| Property AMA Mgmt. Co.           | 264,817        |
| IROC                             | 1,067          |
| Owner Managed Prop.              | 6,937          |
| Property Non AMA Mgmt. Co.       | 21,239         |



## **Education Conference & Trade Show (Phoenix – 2020)**

**Scott Hines, PEM, Chair**

The 2020 Phoenix Education Conference and Trade Show, presented by ZONA Law Group was originally scheduled for Thursday, September 10, 2020 at the Phoenix Convention Center. Due to COVID, in July, the decision was made to combine with the Tucson Trade Show to create a new event, APTUnite and to put a stronger focus on the education portion of the event and offering a marketplace feature for exhibitors. The new dates are October 6<sup>th</sup> & and October 8<sup>th</sup> 2020. booth holders will be offered an opportunity to move their paid booth registration to the 2021 show and receive a free entry into the Marketplace. As of the report 50% of booths were sold for the Phoenix Trade Show and sponsorships exceeded budget.

## **Education Conference & Trade Show (Tucson – 2020)**

**Kimberly Barrow, Chair**

**Amber Stevens, Vice Chair**

The 2020 Tucson Education Conference & Trade Show presented by Zona Law Group was originally scheduled for Thursday, May 21, 2020, at the Tucson Convention Center. Due to COVID the event was rescheduled to October 8, 2020. In July the decision was made to combine the Tucson Trade Show with the Phoenix Trade Show to create a virtual event, APTUnite and to put a stronger focus on the education portion of the show and offering a marketplace for exhibitors. 2020 booth holders will be offered to move their paid booth registration to the 2021 show and receive a free entry into the Marketplace. As of the report 100% of booths were sold for the Tucson Trade Show and sponsorships exceeded budget.

### **Save the Date – 2020 Tucson Trade Show**

- October 6 & 8, 2020 – Virtually



# 2020 Tribute Awards

## Reid Butler, Chair

### Friday, August 21, 2020 – Virtual Awards Celebration

The AMA received 650 nominations from 34 Member companies. Volunteer judges donated approx. 575+ hours to complete the first round of judging.

### Tribute Award Enhancements 2020

- 3 New Categories Added
  - Developer Award – High Rise (2 Nominations)
  - Corporate Employee of the Year (35 Nominations)
  - Arizona Executive of the Year (7 Nominations)
- Updated Category for Clarification
  - Best Team & Community to Best Community Team (no property element judged)
- Industry Partners and Volunteers were interviewed in the Finalist Judging Phase
  - AMA took this step to eliminate interviews per committee recommendation in 2015.
  - Committee recommended AMA bring this back.
- Initial Interview Letters printed on Linen Paper and mailed prior to 2019 Holiday Season
- Initial Letters included a Helpful Tips insert sent in both English and Spanish.
- AMA Produced and distributed “What to expect when you arrive at the AMA” Video to help prepare nominees for coming in for their interviews.
- After letters were mailed, AMA launched a Social Media Campaign called “Show us your nomination letter” there were only a handful of photos submitted or tagged.
- Aptitude Exam provide to Individuals Updated
  - Questions were capped at 20, in 2019 there were 25+ for some categories.
  - Questions were rotated so the same test is not provided to all nominees.
  - Some questions were rewritten for clarification.
- Committee recommended adding additional judging phase to Community Teams in judging process, in 2019 only Panel Interviews were conducted.
  - All Finalists in the Best Community Team Categories will be secret shopped at Finalist Level bringing an additional element added to judging process.
  - Weight Level
    - Panel Interview – 60%
    - Shop Scores – 40%
- At the conclusion of each initial interview, nominees were encouraged to take a “selfie” for a video montage to be created for social media and event promotion. All candidates asked to participate.
- All volunteer judges – 85 in total, were provided with a small thank you gift to show the AMA’s appreciation for their volunteer efforts.
- AMA has begun an aggressive social media campaign counting down to the Awards Celebration. Management Companies were encouraged to share these messages for promotion of their finalists, the event and the industry at large.

- AMA announced all Finalists at a LIVE Facebook Event on Thursday, February 13, 2020 where Executive Committee, former winners, and committee members announced all Finalists, like the Oscar Awards announcement for nominees each year.
  - Over 3000 Views
  - Over 200 Comments
  - Over 21 Shares
  - Touching 9500 Facebook Pages
  - The event was announced in AMA email blasts, promoted on Social Media and included in nominee letter handout.
- 2020 Celebrity Judges completed judging on March 2-4, 2020
  - Toni Blake – Apartment All Star, NAAEI Faculty member.
  - Chip Tatum, CEO/EVP, The Apartment Association of Greater Orlando
  - Alan Pentico, CAE, Executive Director, Southern California Rental Housing Association

In July, 2020 the decision was made to move this event virtual. COVID-19 is preventing groups from meeting in person. AMA staff worked with Cox Communications and Cox Media to produce a quality virtual ceremony. All sponsors continued to support this event and staff created several additional sponsorships to support this event. Sponsors will be delivering the awards to the 2020 winners the week of August 24, 2020. During the Live Streaming event, Finalists are encouraged to Dress Up, hold “watch parties” and awards will be given out for Best Dressed and Best “Watch Party”. Registration to view for Friends and Family – for one log in will be \$60. All Participating property management companies or companies will be encouraged to register for Corporate and their onsite teams.

- \$1,450 – Supporter – Viewing for all Corporate and onsite teams
- \$2,500 – Benefactor – Viewing for all Corporate and onsite teams and advertisement in Tribute Awards Brochure
- \$3,000 – Angel – Viewing for all corporate and onsite teams, Commercial during LIVE stream, Advertisement in Tribute Awards Brochure

#### **Registration Update:**

- Tribute Awards Viewing Reservations currently available online.
  - Friends and Family – 10
  - Supporters – 1
  - Benefactors – 2
  - Angels – 4
- We anticipate over 1,000 viewers to join us.

## Leadership Development Committee

John Carlson, Chair

2020 Lyceum Class has been set. The first course took place on February 28, 2020. The second course took place virtually and facilitated by our Media Consultant – Cary Pfeffer. The Community Service Project has been postponed to October. This requirement may be eliminated due to COVID-19. The AMA will begin promoting 2021 courses in October 2020.

### The 2020 Lyceum Class:

| Associate Member List |                |                                  |  |
|-----------------------|----------------|----------------------------------|--|
| Joellyn               | Buck           | FSI Construction                 | <a href="mailto:joellyn@fsiconstruction.com">joellyn@fsiconstruction.com</a>               |
| Tanner                | Crezee         | Ally Waste                       | <a href="mailto:tanner@allywaste.com">tanner@allywaste.com</a>                             |
| Sara                  | Marcarian-Dabb | Redi Carpet                      | <a href="mailto:sara.marcariandabb@redicarpet.com">sara.marcariandabb@redicarpet.com</a>   |
| William               | Ray            | CSC Serviceworks                 | <a href="mailto:wray@cscsw.com">wray@cscsw.com</a>   |
| Amanda                | Van Kirk       | RentPath                         | <a href="mailto:avankirk@rentpath.com">avankirk@rentpath.com</a>                           |
| Regular Member List   |                |                                  |  |
| Fatime                | Boubion        | Nicolosi & Fitch Inc             | <a href="mailto:fboubion@nicolosifitch.com">fboubion@nicolosifitch.com</a>                 |
| Megan                 | Brown          | Scotia Group                     | <a href="mailto:Mnbrown520@gmail.com">Mnbrown520@gmail.com</a>                             |
| Yvette                | Carillo        | Shelton Residential              | <a href="mailto:ycarrillo@sheltonresidential.com">ycarrillo@sheltonresidential.com</a>     |
| Alberto               | Castanos       | P. B. Bell                       | <a href="mailto:acastanos@pbbell.com">acastanos@pbbell.com</a>                             |
| Tarah                 | Garcia         | Camden                           | <a href="mailto:TGarcia@camdenliving.com">TGarcia@camdenliving.com</a>                     |
| Austin                | Harte          | MEB                              | <a href="mailto:austin.harte@mebmgmt.com">austin.harte@mebmgmt.com</a>                     |
| Dex                   | Hiland         | Alliance Residential             | <a href="mailto:dhiland@allresco.com">dhiland@allresco.com</a>                             |
| Mike                  | Johnson        | HSL Asset Management             | <a href="mailto:mike@Dunlap-Magee.com">mike@Dunlap-Magee.com</a>                           |
| Rachael               | Kish           | Shelton Residential              | <a href="mailto:tamarronmgr@sheltonresidential.com">tamarronmgr@sheltonresidential.com</a> |
| Sara                  | Luster         | Gorman & Company Inc             | <a href="mailto:sluster@gormanusa.com">sluster@gormanusa.com</a>                           |
| Mark                  | McElvain       | Shelton Residential              | <a href="mailto:mmcelvain@sheltonresidential.com">mmcelvain@sheltonresidential.com</a>     |
| Shandra               | Mixey          | Sares Regis Group                | <a href="mailto:smixey@sa-res-regis.com">smixey@sa-res-regis.com</a>                       |
| Ashley                | Perry          | IDM                              | <a href="mailto:ashley.perry@liveidm.com">ashley.perry@liveidm.com</a>                     |
| Allison               | Razza          | Camden                           | <a href="mailto:ARazza@camdenliving.com">ARazza@camdenliving.com</a>                       |
| Ashley                | Rebal          | Alliance Residential             | <a href="mailto:arebal@allresco.com">arebal@allresco.com</a>                               |
| David                 | Stanke         | Alliance Residential             | <a href="mailto:dstanke@allresco.com">dstanke@allresco.com</a>                             |
| Jamie                 | Springer       | Optima Realty                    | <a href="mailto:springerj@optima.inc">springerj@optima.inc</a>                             |
| Rachel                | Thompson       | Alliance Residential             | <a href="mailto:rthompson@allresco.com">rthompson@allresco.com</a>                         |
| Ricky                 | Vaca           | Alliance Residential             | <a href="mailto:rvaca@allresco.com">rvaca@allresco.com</a>                                 |
| Lora                  | Villa          | Northland Investment Corporation | <a href="mailto:lvilla@northland.com">lvilla@northland.com</a>                             |

### Remaining 2020 Lyceum Dates:

- October 16, 2020
- December 3, 2020

We are moving forward with the October 16, 2020 course as planned.

**Consent Agenda – request a report be removed from consent agenda if discussion is needed**

**ARIZONA MULTIHOUSING ASSOCIATION**  
**Board of Directors Meeting**  
**Friday, May 15, 2020**  
**1:00 pm – 4:00 pm**  
**Zoom Conference Call**  
**Minutes**

**Board Members in Attendance:** *Kim Pacheco, Reid Butler, Scott Hines, Linda Coburn, John Carlson, Elizabeth Beaulieu, Krisanne Beckstead, Lesley Brice, Dabann Brown, Luz Bruscini, David Connant, Crystal DeHoag, Anna DiSabato, Natalie Evans, Kimberly Fitch, Adam Greco, Shelly Griggs, Kristin Heiple, Stacey Hogue, Michelle Howland, Susan Knowles, Matt Koglmeier, David Kotin, Sharon Kuhlman, Dustin Lacey, Crystal Litzau, Omar Mireles, April Morris, Gloria Munoz, Lisa Osborn-Warne, Tina Schreiber, Christine Shipley, Michelle Sinclair, David Vanek, Luis Verger, Wendy Weiske, Debbie Willis, Rhonda Woode*

**Emeritus Board Members in Attendance:** *Amy Smith Montoya, Melanie Morrison, Matt Perrin*

**Board Members Not in Attendance:** *Sue Campbell, Kohl Eisenhour, Robert Hicks, John Rials, Lisa Rosenfeld, Mark Schilling, Stacey Searl, Justin Steltenpohl, Greg Stobart, Carmen Suggs, Nicole Wray, Chris Worrell*

**AMA Regular Member in Attendance:** *Andrew Titcher*

**Staff/Consultants Present:** *Courtney LeVinus, Michelle Rill, Lauren Romero, Kyle Simplot, Jonathan Baldenegro, Sarah Fluke, Sharon Hosfeld, Jake Hinman, Bastien Andruet, David Leibowitz*

**Staff/Consultants Not in Attendance:** *Erika McDowell, Lisa Garcia, Christina Desaubin, Amanda Perkunas, Peter Madrid*

**Meeting Sponsors:** *Crest, Windom Security*

**Kim Pacheco called the meeting to order at 1:00pm**

**Sponsors**

Sarah Fluke introduced the sponsors.

**Guest Speaker**

Michael Shore with HOM, Inc.

Kim Pacheco presented the Consent Agenda.

Elizabeth Beaulieu **made a motion** to approve the Consent Agenda. A **second** was made by Kim Fitch. **Motion Passed.**

**Chair Report**

**Introduction of Lyceum Alumni and Emeritus Board Members in attendance** – Kim Pacheco recognized Lyceum Alumni and Emeritus Board Members in attendance.

**Kim Pacheco gave the BBF \$1M Goal Update** – The report reads that \$790K+ has been raised but as of today it is \$828k. Kim Fitch also contributed \$1,000 today. We are very close to raising our goal of \$1,000,000 by the end of this year.

### **Vice Chair Report**

Reid Butler asked Courtney LeVinus to give the update on the upcoming 2020 Board Retreat. The retreat will be at Tanque Verde Ranch from August 20-21. The resort is open, and we lucked out during this COVID because this ranch is spread out and so are the rooms so we can still physically distance. It will basically be our entire group, including sponsors and staff taking over the ranch. Please book soon, we have a block of rooms reserved at \$130+ tax/night. Contact Nicole Meiers, the Sales Manager at Tanque Verde Ranch to book your room and the deadline has been extended to Saturday, July 11<sup>th</sup>. The meeting will tentatively start at 11am on Thursday, August 20<sup>th</sup> and we will end by 2pm on Friday, August 21<sup>st</sup>. Reid Butler asked if the Zoom conference call will be an option for those members that would feel more comfortable calling in and Michelle Rill said she will look into it.

### **Leadership Committee Report**

Installation of Officer, AMA Executive Board Secretary Linda Coburn. John Carlson welcomed the new Executive Member.

During the March 6<sup>th</sup>, 2020 Nicole Wray **made a motion** to approve Linda Coburn A **second** was made by Reid Butler. **Motion Passed.**

Linda Coburn was then sworn in by John Carlson during this May 15<sup>th</sup>, 2020 Board Meeting.

### **Job search for the Deputy Director position**

John Carlson said this position will take care of the AMA operations. This will allow for Courtney LeVinus to take care of higher-level items (such as BGF and legislation). The recommendation from the Exec committee was to move forward with the hiring of this person. John Carlson said we need to start looking for talent that is out there searching for employment considering all the job losses happening. Reid Butler commented that the need for a deputy is stronger now for things that are coming like rent control and the national calls for rent strikes. Even while this is a difficult time and we are all watching our budgets we do need to get this position filled sometime this year.

Reid Butler **made a motion** to approve the job search. A **second** was made by Linda Coburn. **Motion Passed.** The job search will begin on Monday, May 18, 2020.

### **Finance Report**

Courtney LeVinus reviewed the financial dashboard and the finance report that was included in the Board packet. In the Variance Summary, we did receive a check from Crest for \$10,000 for our affinity program. Project SAFE is struggling due to COVID and no resident events are happening. We are canceling travel for staff. Courtney LeVinus will represent the AMA at AOD and Apartmentalize this year in November. There is a reformatted budget for the Events and Education classes that were postponed and are now in the calendar for later in the year. On the 2020 Event Snapshot, Courtney LeVinus explained that we may need to eliminate some events this year

since the second half of the year is event heavy. We are looking at all alternatives and we are not pulling the plug on anything yet, but we will need to soon as June comes in. In addition, we need to hold on to Tributes and both Trade Shows, without these we will go into the red. Adam Greco asked when the Phoenix Convention Center is opening (since that is where our major events are being held) and Courtney LeVinus said it is not open yet as it is owned and managed by the City of Phoenix and that Michelle Rill is staying on top of this. Refer to the Finance Report for more details.

**Surplus Summary** –See Surplus Summary chart in the Board Packet for details.

**Summary of Activities/Revenues & Expenses** – See Finance Report for details.

**Statement of Cash Flows** – See Finance Report for details.

Kim Fitch **made a motion** to approve the Financial Report. A **second** was made by Shelly Griggs **Motion Passed.**

### **Investment Report**

Courtney LeVinus referred to the Investment Report ending March 31<sup>st</sup>, 2020, the ending value is reads less however at the March 6<sup>th</sup>, 2020, the Board had approved to transfer \$200,000 to the BGF Investment Fund. Courtney then referred to the Investment Report ending April 30<sup>th</sup>, 2020 and the ending value is higher with the \$200,000. Investment See Investment Report for more details.

Linda Coburn **made a motion** to approve the Investment Report. A **second** was made by Elizabeth Beaulieu. **Motion Passed.**

### **AMAPAC & BGF**

Reid Butler gave the committee report and he went over the AMAPAC/BGF Voluntary Dues and Board Participation, in addition Reid said he committed \$1,000 and he still needs to settle and anticipates that the staff will send him an invoice. Courtney LeVinus commented that HSL is on there for \$30,000 since they agreed to match companies contributing \$10,000 and so far, three companies have.

Courtney LeVinus asked what the Board feels about the Golf Tournaments and redirecting those funds to the AMA General Fund. Or shall we continue with those funding benefitting the BGF? Between the two golf tournaments it's about \$86,000 in revenue. Kim Pacheco commented that since we do not know if we are going to be able to have those events let's wait on making this decision. If could have those funds go to BGF, that would really help us reach our \$1,000,000 goal. The Tucson Golf Tournament is scheduled for September 25<sup>th</sup> and Phoenix is scheduled for October 30<sup>th</sup>.

### **AMCF Discussion**

Kim Pacheco introduced the discussion on should the AMCF continue with fundraising events considering the state of the market and the AMA events. Courtney LeVinus commented that we do not want the AMCF events to potentially cannibalize the AMA events. At some point this year we will need to consider but not today. Phoenix and Tucson AMCF committees are considering having their bowl-a-thon's in December, provided they get Board approval and that COVID-19 hasn't returned for a second wave. Kim Pacheco asked when we needed to make this decision and Courtney LeVinus said let's wait to see when the Phoenix Convention Center opens and see if we

can have the AMA Tributes and the Phoenix Trade Show. For us to have Tributes in August, which is a larger gathering, we would need to be in COVID phase three.

### **Education Committee**

Luis Verger gave the committee update. The AMA is excited to announce a new National Speaker webinar series to enhance our Education offerings in May and June. This will be a six series webinar classes priced at \$29/class. NAAEI (NALP, CAM and CAPS) CLE Credit will be provided for all sessions. The series speakers scheduled are Kate Good, Lisa Trosien and Jen Piccotti & Kara Rice. Elizabeth Beaulieu commented that on the AMA website these webinars are listed as Phoenix webinars and she asked if we can remove Phoenix so that it opens it up to everyone. Michelle Rill said she will update the website. Luis Verger said that Shelton Residential also sent out the webinar series to their other communities in other states because these are national webinars, so it doesn't make a difference where you are. Michelle Rill said CAM has been rescheduled, we had 21 members sign up. CAM has now been moved to June 22<sup>nd</sup>-June 26th and Kris Wegener is the instructor. NAAEI has now allowed Zoom so whether it be an in-person class or alternatively via Zoom. The participants have all been notified and they are excited to continue to take the course.

### **Events Committee**

Linda Coburn and Adam Greco gave the committee update. The Phoenix Reverse Trade Show is scheduled for June 24<sup>th</sup> and the Tucson Reverse Trade Show will take place on July 16<sup>th</sup>. We are cautiously optimistic on holding these events in person. For the Phoenix Reverse Trade Show, we currently have 81 teams registered and 23 management teams signed up to participate. There are three options: Larger breakout space to enable physical distance, WIFI to enable some to attend electronically (via Zoom) and the option of Speednetworking.com, a new scheduling platform. It is a predetermined schedule for vendors and members ahead of time. Speednetworking.com is currently in development of a new powerful web-based application and is scheduled for release in early July. Which is after the Phoenix Reverse Trade Show, but they have a current system we can take advantage of. Lauren Romero will hopefully be able to take advantage of the new system for the Tucson Reverse Trade Show later in July. If for some reason due to COVID and we cannot hold the event in-person, the use to Speednetworking.com would allow us to continue to have this event. Linda Coburn asked the Board for feedback and asked should we just have this event virtually? Kim Pacheco said she would like to hear from the associates on the Board. Adam Greco said he likes that Speednetworking.com locks you in for that specific time block with a particular management company. In addition, Adam Greco continued to say that if management companies are okay with showing up for in-person, that the associates will show up as well. Lisa Osborn-Warne from Priderock said that last year they got bombarded from vendors and some vendors were not moving on when their allotted time ended. Lisa feels doing this virtually means better quality time with each associate. Courtney LeVinus commented that the critical component is that the Regular members would need to block their allotted time for this event and not be on their computers and distracted. Lesley Brice asked if the property management companies can have multiple people participate and not be in just one spot together. Michelle Rill said unfortunately with the current Speednetworking.com software that is not possible, but Lauren Romero should be able to in July when the software has been upgraded. Lauren Romero said potentially we could use the Speednetworking.com scheduling platform and then use conference call or set up a Zoom so that multiple people can still participate.

### **Guest speaker Michael Shore with HOM, Inc.**



Mike is contracted with the City of Phoenix. Many of the major cities in Arizona received a significant amount of COVID relief funds. HOM, Inc. is going to need to place a lot of residents in apartments in a very short time frame. The City of Phoenix received around \$27 Million dollars from the federal government and about \$9 million is being dedicated between emergency solutions grants money and CDBG and a lot of that is going towards rental assistance. Also, the intervention du jour for people that do not really have severe needs for a forever rental assistance voucher. These people can get back on their feet and in stable housing. This would be for a lighter term intervention anywhere from just a couple of months to six, 9 or 12 months. Customized to the intervention that the family needs, where they can get to the point that they are then your normal tenant that can afford your property. Phoenix is going to give about 260 units to CASS and 300+ to UMOM and they are contracted to be their rental assistance partner. These will be new move-ins, HOM, Inc. is not a housing authority they are a private company and an associate member of the AMA. They are looking to be place about 700 participants into housing over the course of the next year. They are likely going to be expanding operations into to Tucson as well. Mike said that their website HOM, Inc. there is a section for landlords, what the programs are and the benefits. Mike is asking for 1% of units, if you have 100 units, he is asking for 1 unit. Kim Fitch said that when they expand into Tucson to let her know. Gloria Munoz asked if inspections are required, Mike said yes. He said they are almost like a property management company. In addition, HUD has given them a lot of suggestions on how to incentivize landlords, but Mike would rather the AMA Board tell him how to incentivize them. Mike gave his cellphone number (602) 758-0609. The Phoenix dollars must be spent in Phoenix and same will go for the City of Mesa, City of Tempe, Glendale, etc. Reid Butler said that Dunlap & Magee managements some of his properties and they reach out to him soon.

### **Government Affairs**

Jake Hinman reviewed the legislative report.

### **Membership Committee**

Sarah Fluke gave the committee update. Sarah said we have switched gears and are now focused on membership retention. The original goal was set for 300,000 units by the end of the year now we are trying to end the year where we began. They have also asked the committee to turn in their vendor list and they will cross reference to see if they are in AMA membership and if not, they will contact them about joining. We have moved to a calendar dues cycle; all invoices will be sent in November. People are getting prorated invoices and so they are smaller, and this has really helped for renewals.

### **Trade Show Committee**

Lauren Romero gave the committee update that the Tucson Trade Show is rescheduled for October 8<sup>th</sup> and they are sold out. They did sell out and a few companies have backout but with the waitlist she was able to get those resold. Lauren said they are considering on splitting the floor. Splitting the attendees so the Half Day attendees will come in the morning and the Full Day attendings can assess the tradeshow floor in the afternoon. This will reduce the amount of people on the trade show floor itself. We will wait until we get closer to make those decisions and this is for both the Phoenix and Tucson Trade Shows. Michelle Rill said in addition, we are looking into doing a shorten P&P for the executives in the morning from 7:30-9:30am and it would include breakfast. The possible guest speakers would be Tim Sullivan, Elliot Pollock and Mark Dewane. It will be in the lunchroom since we already have the space booked. We really need to think about this so we can pull out of the Hyatt if we decide to go this route. The feedback from the board was they like the idea of combining these two events so it eliminates an event.

### **Tribute Awards Committee**

Courtney LeVinus gave the committee report on the behalf of Reid Butler. We are anticipating less participation this year. This will enable us to space out the dining tables to allow for more physical distancing.

### **President Report**

#### **President Miscellaneous Updates**

Courtney LeVinus gave the update on rent receipts and the percentage received through May 6<sup>th</sup> and there is between 11-15% not paid. Courtney encouraged other Board members that have not taken the quick survey to please complete it.

#### **2020 Event Calendar**

Courtney LeVinus went over the 2020 Event calendar and the revised dates and asked that the Board members please update their calendars.

**Re-Open AZ Apartments** – AMA Best Practices and asked what the management companies are doing. Kim Pacheco (Scotia) said they are opening pools and amenities but during business hours only. Dustin Lacey (Mark-Taylor) said they opened their pools today, Lisa Osborn-Warne (Priderock) and Sharon Kuhlman (Shelton) both said they open on this coming Monday and Sharon said their leasing offices will open but by appointment only. Linda Coburn (NexMetro) said that they are opening their office on Monday and their pool will be open full hours 24/7, they don't want to limit their residents. Shelly Griggs (Avanti) said they will open their pool on Wednesday since they are still waiting for PPE. Amy Smith Montoya (Bella) said their pools are still closed since they don't typically open until May 30<sup>th</sup> and their offices are open but with social distancing, as for their fitness centers they are waiting to open those. Dahnn Brown (Camden) said they told their teams they would get a two week notice so their offices will open either on June 1<sup>st</sup> or June 8<sup>th</sup> and they opened their pools yesterday and they will open their fitness centers next week.

Courtney LeVinus asked the Board if they are getting any residents asking for rent credit since the amenities are closed. Elizabeth Beaulieu said she talked to a resident about that and she explained that the pools and amenities still need to be maintained even though they are not open. Lisa Osborn-Warne said they refer residents to the clause in their rental agreement that reads they can open and close amenities as they see fit. Kim Fitch asked if anyone is having residents sign waivers to use the amenities. Lisa Osborn-Warne said they are having residents sign and they have not had any issues. Matt Koglmeier said it helps if they have something signed and it will hold up in court. Matt said these agreements don't have to be complicated, but he does realize that this is another process to manage, Matt said if you can manage it, he suggests doing it.

Re-opening guidance, this was emailed out to the Board and the AMA members and a thank you to Dahnn Brown and Dustin Lacey for providing some sample signage of what they are using on their properties. These are posted under our Resources Guide on our website.

#### **Communications Committee (taken out of order)**

Dustin Lacey gave the committee report. Dustin said when Governor Ducey announced the re-opening of pools and some amenities it was faster than they anticipated. Mark-Taylor is being particular on how they are approaching the preventative cleaning. They are also not opening the

leasing centers at this time; it will be by appointment only. Since they reopened their pools, they are seeing favorable responses from their residents on their message boards.

**Census 2020** – October 31<sup>st</sup> Self-Response – Courtney LeVinus said the self-reposting has been pushed back to October 31<sup>st</sup> and the state of Arizona is behind on the national average of reporting. Please encourage your residents to be counted and to complete their census.

**AMA Organization Chart** – Courtney LeVinus said no new changes to report. Courtney participates weekly in the Affiliate calls which includes NAA. We are far ahead on several things including our advocacy on securing dollars on eviction prevention.

Next Board Conference Call will be on Tuesday, May 19<sup>th</sup> at 1PM.

With no more new or old business to discuss, **Kim Pacheco adjourned the meeting at 3:15 pm.**

**ARIZONA MULTIHOUSING ASSOCIATION**  
**Board of Directors Meeting**  
**Tuesday, July 21, 2020**  
**9:00 am – 10:00 am**  
**Zoom Conference Call**

Board meeting discussion regarding Governor Ducey's eviction delay executive order extension. Courtney LeVinus gave an update on where we are, the meetings that she and Exec members have had with the Governor's staff and the potential next steps that need to be decided on.

Greg Stobart **made a motion** to approve the proposal to file a special action lawsuit pertaining to the enforcement of the executive order delaying evictions to the Arizona Supreme Court. A **second** was made by Michelle Sinclair. **Motion Passed.** Gloria Munoz and Christine Shipley abstained for voting.

## Committee Reports

### Associate Member Council (Phoenix)

Michelle Howland, Chair

The AMC meeting scheduled for May 14<sup>th</sup> was cancelled. The AMC meeting for July 28<sup>th</sup> was held as scheduled, the virtual host was Liv Communities and 44 members registered to attend. The AMC meetings host raffles to help support the Julie Hurst and Steve Peters Educational Fund. In the last five years, the AMC has visited 30 member-properties. If you have an interest in hosting a future meeting, please contact Michelle.

#### **Save the Date – 2020 AMC Phoenix Schedule (tentative):**

- October 8, 2020

### Associate Member Council (Tucson)

Sue Campbell, Chair

The Tucson Associate Member Council has postponed their meetings due to COVID. New dates will be considered in the fall as social distancing restrictions are lifted.

#### **Save the Date – 2020 AMC Tucson Schedule (tentative):**

- TBD

## Communications Committee

Dustin Lacey, Chair

Dallin Tippetts, Vice-Chair

### 2020 Upcoming Communications & Technology Committee Meetings:

- September 14, 2020
- October 12, 2020
- November 9, 2020
- December 14, 2020

### Action Items from the May 11 & June 11, 2020 Communications Committee Meetings:

Create Summary sheet with 3 bullet points stating importance of creating user account along with 90 second "How To Create An Account"

- Guidance on Reopening Properties
- Dustin will send list of questions that will need to be answered.
- Christina will send analytics on AMA Resource Page
- Christina will add Dustin as a user on AMA google analytics
- Laura and Dustin will send signage templates to Courtney
- AMA will start working together on guidance/best practices document that will include resident communication, sample letters, sanitation recommendations, signage recommendations, etc...
- Sarah mentioned AMA is working on a "Thank You" piece the end of this summer that recounts how the AMA has provided value to members. As it gets closer, the committee will help with verbiage and putting it together.
- Discuss protests/racial injustice next meeting
- Collect approaches of other companies in our industry – reminder on feedback on what's been seen
- If you have any training/curriculum on diversity or unconscious bias, please send our way

### Communication Update

- Weekly COVID-19 update email sent to membership
- COVID-19 Resource page created on the website to house important documents and resources for members
- COVID-19 Associate Member page created to list all associate members who have proper PPE to enter apartment homes safely to perform services
- Positive Post Friday created to highlight the positive stories from members during COVID-19
- Shared stories, articles, and interviews from leadership interacting with local media
- New University of AMA page

### Upcoming 2020 Publication Schedule:

- July/August (Tributes Edition)
- September/October – Apartment News
- November/December – Apartment News

**Apartment News Ad Pricing:****Full Page (Not Front or Back):**

- 6x \$428/e
- 3x \$475/e
- 1x \$500/e

**Front Page Cover:**

- 6x \$513/e
- 3x \$570/e
- 1x \$600/e

**Back Page:**

- 6x \$599/e

- 3x \$665/e

- 1x \$700/e

**Half Page :**

- 6x \$342/e
- 3x \$380/e
- 1x \$400/e

**Quarter Page:**

- 6x \$257/e
- 3x \$285/e
- 1x \$300/e

**AMA Website Advertising Opportunities:****Events/Education Schedule Pages**

\$900

**Associate Member Spotlight**

\$1600

**Why Rent Page**

\$1200

**Enhanced Member Directory Listing**

\$300

## **Education Committee (Phoenix)**

**Luis Verger, Shelton Residential, Chair**

**Bry Carter, The Phoenix Staffing, Co-Chair**

Due to the Pandemic – COVID-19, AMA staff had to move courses and or reschedule many March – August in person courses. We hope to get most rescheduled throughout the remainder of the 2020 calendar. In the meantime, to help support our AMA members, staff and committee members have created mini webinars held virtually utilizing the ZOOM Webinar Platform some at no cost to members. These have been very well received, with an average attendance of 30+. To date we have presented more than 30 webinars. From May through July we planned several Zoom mini webinars including Maintenance Customer Service Bootcamp, Latte with A Lawyer Town Hall Meetings (6), Defusing Resident Bombs, Secrets of Leasing Leaders and a July Virtual Fair Housing Course.

Moving forward we intend to schedule most of our education programming via virtual webinars. Staff is exploring other opportunities to utilize NAAEI Instructors moving forward for Webinar content.

### **2020 Phoenix Education Classes (see schedule)**

\*Highlight = Less attendees than budget



| Class   | Time          | Date         | Where          | Cost  | Instructor                              | Budget | Attended    |
|---|---------------|--------------|----------------|-------|---|--------|-------------|
| Fair Housing  | 9 am - 12 pm  | 1/22/2020    | Gallery        | \$30  | Mark Zinman                             | 20     | 20          |
| Landlord and Tenant                                 | 9 am - 12 pm  | 2/18/2020    | Galley         | \$30  | Christopher Walker                      | 20     | 24          |
| Heating & Cooling Basics                            | 9 am - 12 pm  | 2/20/2020    | Trane Location | \$75  | Trane - Instructors                     | 20     | 13          |
| Lyceum Day 1  | 9 am - 5 pm   | 2/28/2020    | Gallery        | \$375 | All about AMA - Personality Profiles    | 20     | 24          |
| ADD ON TONI BLAKE                                   | 9 am - 5 pm   | 3/5/2020     | Gallery        | \$59  | Toni Blake                              | ADDED  | ADDED       |
| Appliance Repair - Phoenix                          | 9 am - 12 pm  | 3/11/2020    | Gallery        | \$30  | Wilmar                                  | 20     |             |
| R410 - Phoenix                                      | 9 am - 12 pm  | 3/12/2020    | Galley         | \$30  | Wilmar                                  | 20     | Cancelled   |
| CAM Course Day 1- Phoenix                           | 8am - 5pm     | 7/20 - 3/24  | Galley         | \$895 | Kris Wegener                            | 20     | Rescheduled |
| Fair Housing - Phoenix                              | 9 am - 12 pm  | 3/6/2020     | Gallery        | \$30  | TBD                                     | 20     | Rescheduled |
| EPA Class Plus Testing Day 1                        | 9 am - 5 pm   | 9/28-29/2020 | Galley         | \$75  | Rodney Wilson                           | 20     | Rescheduled |
| EPA Class Plus Testing Day 2                        | 9 am - 5 pm   | 9/28-29/2021 | Galley         | \$75  | Rodney Wilson                           |        | Rescheduled |
| Active Shooter- Phoenix                             | 9 am - 11 am  | 4/9/2020     | Gallery        | \$30  | Blue Steel Security - Mark Coxen        | 20     | Rescheduled |
| Landlord Tenant - Phoenix                           | 9 am - 12 pm  | 4/16/2020    | Gallery        | \$30  |   | 20     | Rescheduled |
| Fair Housing/ Assistive Animals - Phoenix           | 9 am - 12 pm  | 4/21/2020    | Galley         | \$30  | Panel - Debra Hill Fox                  | 20     | Rescheduled |
| Electrical Trouble Shooting - Phoenix               | 9 am - 12 pm  | 4/22/2020    | Gallery        | \$30  | Michael Cougenhour - Kowalski Elect     | 20     | Rescheduled |
| Leadership Development                              | 9 am - 12 pm  | 4/29/2020    | Gallery        | \$30  | Tracey Carboun, Alliance Residential    | 20     | Rescheduled |
| Plumbing Basics - Phoenix                           | 9 am - 12 pm  | 5/19/2020    | ZOOM           | \$30  | Shannon / Alliance Plumbing             | 20     | 2           |
| Tips and Tricks to Avoid Being Ghoted               | 2 pm - 3 pm   | 5/20/2020    | ZOOM           | \$29  | Kate Good                               |        | 18          |
| The Power of Positive Communication                 | 2 pm - 3 pm   | 5/22/2020    | ZOOM           | \$29  | Lisa Trosien                            |        | 18          |
| CPO Course Day 1 - Phoenix                          | 9 am - 5 pm   | 5/27/2020    | Gallery        | \$220 | Ed Kiper, the Phoenix Staffing          | 20     | Rescheduled |
| CPO Course Day 2 - Phoenix                          | 9 am - 5 pm   | 5/28/2020    | Gallery        | \$220 | Ed Kiper, the Phoenix Staffing          | 20     | Rescheduled |
| Lyceum Day 2 - Phoenix                              | 9 am - 5 pm   | 5/29/2020    | Gallery        | \$0   | Media - Cary Pfeffer                    | 20     | Zoom        |
| Like a Boss! Coxing Great Performance               | 2 pm - 3 pm   | 6/2/2020     | ZOOM           | \$29  | Jen Piccotti and Kara Rice              |        | 11          |
| The Upside of a Down Trending Market                | 2 pm - 3 pm   | 6/4/2020     | ZOOM           | \$29  | Kate Good                               |        | 8           |
| Maintenance Customer Service                        | 9 am - 12 pm  | 6/9/2020     | ZOOM           | \$30  | Ed Kiper, the Phoenix Staffing          | 20     | 5           |
| Gen-Z Needs their First Apartment!Leasing with G    | 2 pm - 3 pm   | 6/9/2020     | ZOOM           | \$29  | Kate Good                               |        | 10          |
| What Apartment Communities Need to Know Abou        | 2 pm - 3 pm   | 6/10/2020    | ZOOM           | FREE  | Rod Wilson, Denise Holliday, Adam Greco |        | 29          |
| Hvac or Pool 101 Maintenance Course - Phoenix       | 9 am - 12 pm  | 6/10/2020    | Galley         | \$30  | Wilmar                                  | 20     | Rescheduled |
| The Likability Factor                               | 2 pm - 3 pm   | 6/11/2020    | ZOOM           | \$29  | Lisa Trosien                            |        | 10          |
| Latte With A Lawyer                                 | 2 pm - 3 pm   | 6/12/2020    | ZOOM           | FREE  | Christopher Walker                      |        | 46          |
| Latte With A Lawyer                                 | 2 pm - 3 pm   | 6/19/2020    | ZOOM           | FREE  | Mark Zinman                             |        | 59          |
| Defusing Resident Bombs                             | 9 am - 12 pm  | 6/25/2020    | ZOOM           | \$30  |   | 20     | 16          |
| Latte With A Lawyer                                 | 2 pm - 3 pm   | 6/26/2020    | ZOOM           | FREE  | Denise Holliday, Bryn Edmon             |        | 17          |
| ADA Course - Phoenix                                | 9 am - 12 pm  | 7/8/2020     | Gallery        | \$30  | TBD                                     | 20     | Rescheduled |
| Latte With A Lawyer                                 | 2 pm - 3 pm   | 7/10/2020    | ZOOM           | FREE  | Christopher Walker                      |        | 22          |
| Secrets of Leasing Leaders                          | 9 am - 12 pm  | 7/10/2020    | ZOOM           | \$50  | Kris Wegener and Friends                | 20     | 14          |
| Latte With A Lawyer                                 | 2 pm - 3 pm   | 7/17/2020    | ZOOM           | FREE  | Mark Zinman                             |        | 32          |
| CAM Course  | 9 am - 4 pm   | 7/20-7/24    | ZOOM           | \$895 | Kris Wegener                            | 20     | 6           |
| Landlord Tenant - Phoenix                           | 9 am - 12 pm  | 7/23/2020    | Gallery        | \$30  |   | 20     | Rescheduled |
| Fair Housing  | 9 am - 12 pm  | 7/23/2020    | ZOOM           | \$30  | Deb Fox                                 | 20     | 63          |
| Latte With A Lawyer                                 | 2 pm - 3 pm   | 7/24/2020    | ZOOM           | FREE  | Bry Edmond, Denise Holliday             |        | 15          |
| How to Protect Yourself from Liability During Covid | 10 am - 11 am | 7/29/2020    | ZOOM           | FREE  | Amanda Perkins                          |        |             |
| EPA Course/ HVAC                                    | 9 am - 12 pm  | 8/18/2020    | Gallery        | \$30  | Wilmar                                  | 20     | Rescheduled |
| CPO Day 1 - Phoenix                                 | 9 am - 5 pm   | 8/26/2020    | Gallery        | \$220 | Ed Kiper, the Phoenix Staffing          | 20     | Rescheduled |
| CPO Day 2 - Phoenix                                 | 9 am - 5 pm   | 8/27/2020    | Gallery        | \$220 | Ed Kiper, the Phoenix Staffing          | 20     | Rescheduled |
| Landlord and Tenant - Phoenix                       | 9 am - 12 pm  | 9/12/2020    | Gallery        | \$30  | Zoom - Judy Drickey Prohow              | 20     |             |
| NALP - WEEK   | 9 AM - 5 PM   | 9/21/2020    | Gallery        | \$375 | Kris Wegener                            | 20     |             |
| Landlord Tenant - Flagstaff                         | 9 am - 12 pm  | 10/9/2020    | Flagstaff      | \$30  |   | 20     |             |
| Domestic Violence - Phoenix                         | 9 am - 12 pm  | 10/14/2020   | Gallery        | \$30  | Panel                                   | 20     |             |
| Lyceum Day 3 - Phoenix                              | 9 am - 5 pm   | 10/16/2020   | Gallery        | \$0   | Government Affairs Day                  | 20     |             |
| R410 Course - Phoenix                               | 9 am - 12 pm  | 10/20/2020   | Gallery        | \$30  | WILMAR                                  | 20     |             |
| CPR First Aid - Phoenix                             | 9 am - 5 pm   | 10/23/2020   | Gallery        | \$70  | Kowalski Construction                   | 20     |             |
| Plumbing Basics - Phoenix                           | 9 am - 12 pm  | 10/28/2020   | Gallery        | \$30  | Wilmar                                  | 20     |             |
| Fair Housing - Flagstaff                            | 9 am - 12 pm  | 10/4/2020    | Flagstaff      | \$30  |   | 20     |             |
| Lyceum Day 4 - Phoenix                              | 9 am - 5 pm   | 12/3/2020    | Gallery        | \$0   | Board of Directors Meeting              | 20     |             |
| Turn Ready Maintenance - Phoenix                    | 9 am - 3pm    | 12/9/2020    | Gallery        | \$50  | Greystar Instructor / Property          | 20     |             |
| Appliance Repair - Phoenix                          | 9am - 12 pm   | 12/10/2020   | Gallery        | \$30  | Wilmar                                  | 20     |             |

## Education (Tucson)

The Tucson courses are being offered and added based on the needs and interest of members. NAA credential courses were not offered in Tucson. If interested in having your employees participate in credential courses in 2020 please let Lauren know so we may determine interest and the possible addition of credential courses for southern Arizona. See the 2020 course offerings and attendance to date below:

### 2020 Tucson Education Classes

| Class                         | Time         | Date     | Where  | Cost | Instructor                  | Budget | Attended              |
|-------------------------------|--------------|----------|--------|------|-----------------------------|--------|-----------------------|
| Fair Housing                  | 9 am - 12 pm | 1/14/20  | Tucson | \$30 | Matt Koglmeier              | 10     | 31                    |
| HVAC 101                      | 9 am - 11 am | 2/18/20  | Tucson | \$30 | Home Depot                  | 15     | 12                    |
| Leasing Leaders               | 9 am - 12 pm | 3/10/20  | Tucson | \$30 | Natalie Evans               | 10     | 27                    |
| AZ Landlord                   | 9 am - 12 pm | 3/12/20  | Tucson | \$30 | Judy Drickey-Prohow         | 10     | 6                     |
| Pool Troubleshooting          | 9 am - 12 pm | 3/26/20  | Tucson | \$30 | Home Depot                  | 15     | Canceled              |
| R410-A                        | 9 am - 12 pm | 4/16/20  | Tucson | \$30 | Home Depot                  | 15     | Canceled              |
| Disaster Preparedness         | 9 am - 12 pm | 6/11/20  | Tucson | \$30 | ATI                         | 20     | Canceled              |
| DV, Service Animals & Notices | 9 am - 12 pm | 6/25/20  | Tucson | \$30 | Blythe Edmondson            | 10     | Canceled              |
| Fair Housing                  | 9 am - 12 pm | 6/23/20  | Tucson | \$30 | Judy Drickey-Prohow         | 10     | Combined with Phoenix |
| Plumbing Basics               | 9 am - 12 pm | 8/27/20  | Tucson | \$30 | Silverado Rooter & Plumbing | 15     |                       |
| R410-A                        | 9 am - 12pm  | 9/17/20  | Tucson | \$30 | Home Depot                  | 15     |                       |
| Conflict Resolution           | 9 am - 12 pm | 9/24/20  | Tucson | \$30 | Catherine Tornbom           | 10     |                       |
| Appliance Repair              | 9 am - 12 pm | 10/15/20 | Tucson | \$30 | Home Depot                  | 20     |                       |
| AZ Landlord                   | 9 am - 12 pm | 10/22/20 | Tucson | \$30 | Matt Koglmeier              | 15     |                       |

\*Highlight = Less attendees than budget

## **Ethics Committee**

**Debbie Willis, Chair**

No active ethics complaints at this time.

## **Events Committee (Phoenix)**

**Linda Coburn, Chair**

**Adam Greco, Vice-Chair**

### **2020 Dinner Meetings**

#### **January 23, 2020 Dinner Meeting Update**

- Guest Speaker – Bry Carter, Phoenix Staffing – Big Hearts Awards
- Total Registered – 176
- Regular Members Registered – 62 or 35%
- Associate Members Registered – 114 or 64%
- Board members who attended – 7 or 4%

#### **September 24, 2020 Dinner Meeting - Tentative**

- Guest Speaker TBD
- Project SAFE Award Ceremony

#### **December 8, 2020 Dinner Meeting – Scheduled because April Date Rescheduled**

- Holiday Celebration
- PAC Silent Auction
- 2012 Black BMW 3 Series Car Raffle Give Away

#### **June 24, 2020 Phoenix Reverse Trade Show - Virtual**

- i. June 24, 2020, 9am to 12:30pm – Online – Zoom Platform
- ii. Theme – Roaring 20's
- iii. Attendance
  1. Associate Members - 105
  2. Regular Members – 20
    - a. 2 companies cancelled at the last minute
    - b. Pinnacle & Sares Regis
    - c. Worked out a plan to reach out to participants later.
- iv. Sponsors had 5 total interviews – 7 minutes each
- v. Fast Passes had 4 total interviews – 7 minutes each
- vi. Teams had 3 total interviews – 7 minutes each
- vii. AMA Team offered additional benefits for the virtual show
  1. Regular Members -
    - a. Gift Baskets – snacks and items provided by Sponsors
    - b. Sponsors delivered baskets
    - c. Vendor directory highlighting all Associate Member Cos. Participants
    - d. Zoom log in for each company
    - e. All scheduling provided to each company
    - f. Instructional Video on how to use Zoom for the meetings.
    - g. Dedicated AMA Staff for assistance.

2. Associate Members –
  - a. Management company Information Booklet
  - b. AMA Video Recorded Interviews with 15 participating management cos. providing detail on who to reach and upcoming projects.
  - c. Dedicated AMA Staff for assistance.
  - d. Schedule provided prior to beginning the show.
  - e. Opportunity to cancel without penalty.

## 2020 Upcoming Events

- **AMA Tribute Awards**
  - August 21, 2020 – Virtual Award Ceremony
- **AMA Education Conference & Trade Show – Cancelled for 2020 move to new event – APTSunite – Education Conference**
  - October 6 & 8 – Virtual Education Programming & Marketplace
- **Perspectives & Projections – Combined with Virtual APTSunite**
  - October 6, 2020 – Virtual
- **Golf Tournament – Jim Kowalski**
  - October 30, 2020 – Starfire Golf Course
  - Begin Registration July at AMC Meeting
- **Maintenance Mania – Richard Kafka & Rhonda Wooder**
  - November 19, 2020 – Phoenix Convention Center
  - Sub Committee will begin meeting in August 2020

## Golf Tournament (Tucson)

Bob Lebsack, Chair

Sue Campbell, Vice Chair

The 2020 Tucson Golf Tournament presented by SmartRent was scheduled for Friday, March 27<sup>th</sup> at the Randolph Golf course with the theme of “March Madness with the AMA”. Due to COVID, the event was moved to September 25, 2020. As of the report all holes, foursomes and major sponsorships have been sold and all foursomes have been sold except for two which are on hold for the BGF Auction. The BGF Auction was held on for March 4<sup>th</sup> at Café a la Cart and raised approximately \$11,975. Due to a reduction in shared holes, and an increase in discounted foursomes this year, the budget is slightly lower than expected but hopefully some smaller sponsorship sales will make up the difference.

## Save the Date – 2020 Golf Tournament

- September 25, 2020 - Randolph Golf Course

## Maintenance Mania (Tucson - 2020)

Tim Furnas, Chair

Tanya Duttie, Vice Chair

The 2020 Tucson Maintenance Mania is scheduled for November 12, 2020, at the Tucson Convention Center. The committee will begin meeting in August.

### Save the date – 2020 Tucson Maintenance Mania

- November 12, 2020 – Tucson Convention Center

## NAA Report

John Carlson

### Save the Dates – 2020 NAA Upcoming Meetings & Events

- November 1-4– Assembly of Delegates (AOD), Kay Bailey Hutchinson Convention Center, Dallas, Tx
- November 2-6 - NAA Apartmentalize – APTvirtual – For those that cannot attend in person
- November 4-6 - NAA Apartmentalize, Kay Bailey Hutchison Convention Center, Dallas, TX

## Are you using Click & Lease?

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Collects relevant future resident data and optimizes the application process for prospective residents
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## **Networking Committee (Tucson)**

**Elizabeth Beaulieu, Chair**

**Tammy Minot, Vice Chair**

The first networking event of the year was the Cocktails & Comradery networking event on February 27<sup>th</sup>. There was a total of 21 sponsors and 82 attendees (66% regular members) are registered. Dinner meetings attendance continues to remain strong: January 197 attendees (75% regular members). The April dinner meeting was canceled due to COVID-19. The networking committee planned a Virtual Happy Hour on April 23<sup>rd</sup> for members to connect during quarantine. A total of 46 members joined, about half were regular members. Members introduced themselves, they told what company they were with and they talked about a funny hat they wore to the Virtual Happy Hour event. Raffle prizes were handed out sponsored by AAA Landscaping, Southwest Solutions and Quarterpenny Management.

### **Save the Date – 2020 Networking Events**

- October 22, 2020 - Fall Dinner Meeting
- October 29, 2020- Chili Cook Off

## **Reverse Trade Show (Tucson – 2020)**

**Darryl Humbles, Chair**

The 2020 AMA Tucson Trade Show, presented by ATI Restoration, was held virtually on July 16<sup>th</sup>. The theme for this year is “Wild West Showdown with the AMA.” There was a total of 65 teams including sponsors, who met with 14 management companies for a total of 320 interviews. The feedback was generally very good; people would have liked a little longer time to meet and would like to be in person again. The management companies and associate members both liked how there were fewer distractions.

## **Social Responsibility Committee (Phoenix)**

**Christi Moutray & Daniel Vollmer, Co-Chairs**

### **Project S.A.F.E. (Phoenix)**

- A list of Virtual Project SAFE resident event ideas has been posted on the AMA website and the list was emailed out to all the communities that held a Project SAFE event last year.
- The Phoenix Project SAFE Co-Chairs and two other committee members each did a 45 second video promoting Project SAFE. This video was shared on our social media channels and on an AMA eblast. In the video the participants promoted virtual Project SAFE events, tips and ideas while still practicing social distancing.
- Each committee member was assigned to be a liaison to a management company. These committee members reached out promoting the video and offered assistance to help out with their Project SAFE events.
- These management companies are currently participating in Project SAFE: Dunlap & Magee, P.B. Bell and Alliance/Greystar and Weidner.
- Project SAFE runs until the end of December, however for those that would like to participate in our “Best Of” the deadline is August 31, 2020. Many communities said they are waiting to hold off until the fall to have their Project SAFE events for when it’s cooler.

## **Social Responsibility Committee (Tucson)**

**Sarah Marcarian-Dabb, Chair**

**Denise Trentacosta, Vice Chair**

### **Project S.A.F.E. (Tucson)**

The Tucson Project S.A.F.E. committee put together virtual event ideas to help members bring safety tips to their communities and also finding ways to connect amidst quarantine. This year the event season was extended to the end of the year however the “Best Of” submissions must be turned in by September 15<sup>th</sup>. The goal for 2020 is 100 participating properties. As of the report a there are a total of 57 registrations. The committee also put together additional online resources that communities can use if the they can’t find a speaker or if their speaker falls through, which is one of the more challenging obstacles to overcome.

## 2020 AMA Board of Directors Contact List

|                 | Last     | First | Company                 | Email  | Expire |
|-----------------|----------|-------|-------------------------|--|--------|
| Chair           | Pacheco  | Kim   | Scotia Group Management | <a href="mailto:kim@scotiagroup.com">kim@scotiagroup.com</a>                 | 2020   |
| Vice Chair      | Butler   | Reid  | Butler Housing Company  | <a href="mailto:reid@butlerhousing.com">reid@butlerhousing.com</a>           | 2022   |
| Treasurer       | Hines    | Scott | PEM Real Estate Group   | <a href="mailto:scothh@pemreg.com">scothh@pemreg.com</a>                     | 2022   |
| Secretary       | Coburn   | Linda | NexMetro Development    | <a href="mailto:linda@nexmetro.com">linda@nexmetro.com</a>                   | 2022   |
| Imm. Past Chair | Carlson  | John  | Mark-Taylor Residential | <a href="mailto:jcarlson@mark-taylor.com">jcarlson@mark-taylor.com</a>       | 2020   |
| AMC Exec.       | Campbell | Sue   | Redi Carpet             | <a href="mailto:Sue.Campbell@redicarpet.com">Sue.Campbell@redicarpet.com</a> | 2022   |

|    | Last         | First     | Company                       | Email  | Expire |
|----|--------------|-----------|-------------------------------|--|--------|
| 7  | Beaulieu     | Elizabeth | Quarterpenny Management       | <a href="mailto:elizabeth@quarterpc.com">elizabeth@quarterpc.com</a>                 | 2021   |
| 8  | Beckstead    | Krisanne  | Picerne Real Estate Group     | <a href="mailto:kbeckstead@picerneaz.com">kbeckstead@picerneaz.com</a>               | 2021   |
| 9  | Brice        | Lesley    | MC Residential                | <a href="mailto:lbrice@mccompanies.com">lbrice@mccompanies.com</a>                   | 2021   |
| 10 | Brown        | Dahnn     | Camden Property Trust         | <a href="mailto:dbrown@camdenliving.com">dbrown@camdenliving.com</a>                 | 2020   |
| 11 | Bruscini     | Luz       | MEB Management Services       | <a href="mailto:luz@mebmgmt.com">luz@mebmgmt.com</a>                                 | 2020   |
| 12 | Connant      | David     | Valley Wide Security          | <a href="mailto:connant_vps@msn.com">connant_vps@msn.com</a>                         | 2020   |
| 13 | DeHoag       | Crystal   | Bella Investment Group        | <a href="mailto:cfdehoag@bellainvgroup.com">cfdehoag@bellainvgroup.com</a>           | 2021   |
| 14 | DiSabato     | Anna      | Dunlap & Magee                | <a href="mailto:anna@dunlap-magee.com">anna@dunlap-magee.com</a>                     | 2020   |
| 15 | Eisenhour    | Kohl      | Avenue 5 Residential          | <a href="mailto:keisenhour@avenue5.com">keisenhour@avenue5.com</a>                   | 2021   |
| 16 | Evans        | Natalie   | CoStar/Apartments.com         | <a href="mailto:nevans1@costar.com">nevans1@costar.com</a>                           | 2020   |
| 17 | Fitch        | Kimberly  | Nicolosi & Fitch, Inc.        | <a href="mailto:kfitch@nicolosifitch.com">kfitch@nicolosifitch.com</a>               | 2021   |
| 18 | Greco        | Adam      | Burns Pest Elimination        | <a href="mailto:adam@burnspestelimination.com">adam@burnspestelimination.com</a>     | 2021   |
| 19 | Heiple       | Kristin   | Baron Property Services       | <a href="mailto:kheiple@baronproperties.com">kheiple@baronproperties.com</a>         | 2022   |
| 20 | Hicks        | Robert    | Alliance Residential Company  | <a href="mailto:rhicks@allresco.com">rhicks@allresco.com</a>                         | 2021   |
| 21 | Hogue        | Stacey    | Greystar Real Estate Partners | <a href="mailto:shogue@greystar.com">shogue@greystar.com</a>                         | 2022   |
| 22 | Howland      | Michelle  | Blue Steel Security           | <a href="mailto:Michelle@mybluesteelteam.com">Michelle@mybluesteelteam.com</a>       | 2021   |
| 23 | Knowles      | Susan     | J.R. McDade                   | <a href="mailto:sknowles@jrmcdade.com">sknowles@jrmcdade.com</a>                     | 2020   |
| 24 | Koglmeier    | Matt      | Koglmeier Law Group PLC       | <a href="mailto:matt@zona.law">matt@zona.law</a>                                     | 2020   |
| 25 | Kotin        | David     | Kay-Kay Realty                | <a href="mailto:David@kay-kay.biz">David@kay-kay.biz</a>                             | 2021   |
| 26 | Kuhlman      | Sharon    | Shelton Residential           | <a href="mailto:skuhlman@sheltonresidential.com">skuhlman@sheltonresidential.com</a> | 2022   |
| 27 | Lacey        | Dustin    | Mark-Taylor Residential       | <a href="mailto:dustin.lacey@mark-taylor.com">dustin.lacey@mark-taylor.com</a>       | 2020   |
| 28 | Mireles      | Omar      | HSL Asset Management          | <a href="mailto:omar@hslproperties.com">omar@hslproperties.com</a>                   | 2021   |
| 29 | Morris       | April     | Cox Communications            | <a href="mailto:April.Morris@cox.com">April.Morris@cox.com</a>                       | 2020   |
| 30 | Munoz        | Gloria    | Maricopa County Housing       | <a href="mailto:g.munoz@maricopahousing.org">g.munoz@maricopahousing.org</a>         | 2020   |
| 31 | Osborn-Warne | Lisa      | Priderock Capital Partners    | <a href="mailto:losborne-warne@prcplc.com">losborne-warne@prcplc.com</a>             | 2020   |
| 32 | Rials        | John      | Western Wealth Capital        | <a href="mailto:john@westernwealthcapital.com">john@westernwealthcapital.com</a>     | 2021   |
| 33 | Rosenfeld    | Lisa      | HSL Asset Management          | <a href="mailto:Lisa@hslproperties.com">Lisa@hslproperties.com</a>                   | 2021   |
| 34 | Schilling    | Mark      | MEB Management Services       | <a href="mailto:mark@mebmgmt.com">mark@mebmgmt.com</a>                               | 2020   |
| 35 | Schreiber    | Tina      | Alliance Residential Company  | <a href="mailto:tschreiber@allresco.com">tschreiber@allresco.com</a>                 | 2021   |
| 36 | Searl        | Stacey    | Weidner                       | <a href="mailto:stacey@weidner.com">stacey@weidner.com</a>                           | 2020   |
| 37 | Sevilla      | Crystal   | Weidner                       | <a href="mailto:crystals@weidner.com">crystals@weidner.com</a>                       | 2022   |
| 38 | Shipley      | Christine | Dunlap & Magee                | <a href="mailto:cshipley@dunlap-magee.com">cshipley@dunlap-magee.com</a>             | 2021   |
| 39 | Sinclair     | Michelle  | Evergreen Devco, Inc          | <a href="mailto:msinclair@evgre.com">msinclair@evgre.com</a>                         | 2022   |
| 40 | Steltenpohl  | Justin    | P.B. Bell Companies           | <a href="mailto:jsteltenpohl@pbbell.com">jsteltenpohl@pbbell.com</a>                 | 2020   |
| 41 | Stobart      | Greg      | MG Properties                 | <a href="mailto:gstobart@mgproperties.com">gstobart@mgproperties.com</a>             | 2020   |
| 42 | Suggs        | Carmen    | ConAm                         | <a href="mailto:csuggs@conam.com">csuggs@conam.com</a>                               | 2021   |
| 43 | Vanek        | David     | Greystar Real Estate Partners | <a href="mailto:dvaneke@greystar.com">dvaneke@greystar.com</a>                       | 2022   |
| 44 | Verger       | Luis      | Shelton Residential           | <a href="mailto:lverger@sheltonresidential.com">lverger@sheltonresidential.com</a>   | 2020   |
| 45 | Weiske       | Wendy     | Gorman & Company              | <a href="mailto:wweiske@gormanusa.com">wweiske@gormanusa.com</a>                     | 2021   |
| 46 | Willis       | Debbie    | P.B. Bell Companies           | <a href="mailto:dwillis@pbbell.com">dwillis@pbbell.com</a>                           | 2022   |
| 47 | Wray         | Nicole    | Greystar Real Estate Partners | <a href="mailto:nwray@greystar.com">nwray@greystar.com</a>                           | 2020   |
| 48 | Wooder       | Rhonda    | Stratton Restoration          | <a href="mailto:Rhonda@strattonbuilders.com">Rhonda@strattonbuilders.com</a>         | 2022   |
| 49 | Worrell      | Chris     | GPM Landscape                 | <a href="mailto:chris@gpmlandscape.com">chris@gpmlandscape.com</a>                   | 2022   |



# 2020 Events



## **January**

1/23/2020 – Phoenix Dinner Meeting  
1/30/2020 – Tucson Dinner Meeting

## **February**

2/27/2020 – Tucson Cocktails & Comradery

## **March**

3/6/2020 – AMA Board Meeting at AMA  
3/10-13/2020 – NAA Advocate, Washington, DC

## **May**

5/15/2020 – AMA Board Meeting at AMA

## **June**

6/24/2020 – Phoenix Reverse Trade Show

## **July**

7/16/2020 – Tucson Reverse Trade Show

## **August**

8/20/2020 – AMA Board Meeting  
8/21/2020 – Tribute Awards

## **September**

9/24/2020 – Phoenix Dinner Meeting - Tentative  
9/25/2020 – Tucson Golf Tournament

## **October**

10/6 & 10/8/2020 – Phoenix & Tucson APTSuite  
Education Conference  
10/6/2020 – Perspectives & Projections  
(Combined with Virtual APTSuite)  
10/22/2020 – Tucson Dinner Meeting  
10/29/2020 – Tucson Chili Cook Off  
10/30/2020 – Phoenix Golf Tournament

## **November**

11/1-4/2020 – NAA Assembly of Delegates, Dallas TX  
11/2-6/2020 – NAA Apartmentalize, APTvirtual  
11/4-6/2020 – NAA Apartmentalize, Dallas, TX  
11/12/2020 – Tucson Maintenance Mania  
11/19/2020 – Phoenix Maintenance Mania

## **December**

12/3/2020 – AMA Board Meeting  
12/8/2020 – Phoenix Dinner Meeting/Holiday Mixer  
12/10/2020 – Tucson AMCF Bowl-A-Thon  
12/11/2020 – Phoenix AMCF Bowl-A-Thon - Tentative