



ARIZONA MULTIHOUSING ASSOCIATION

Board of Directors Meeting

Friday, March 5, 2021

12:00 pm – 4:30 pm

Seasons 52,
Phoenix, AZ

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.

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ARIZONA MULTIHOUSING ASSOCIATION

Board of Directors Meeting Agenda

Friday March 5, 2021

12:00 pm – 4:30 pm

Seasons 52 & Zoom

- I. Call to Order.....Reid Butler, Chair
- II. Approval of the AMA December Minutes **(action needed)**..... Reid Butler, Chair
- III. Chair Report..... Reid Butler, Chair
 - a. Chair Update
 - b. Introduction of Lyceum Alumni and Emeritus Board Members in attendance
 - c. AMA Board Members Personal Goals
 - d. Arizona Housing Fund
 - e. Other Updates
- IV. Vice Chair Report.....Scott Hines, Vice Chair
 - a. Tribute Awards – Nominations & Save the Date August 13th
 - b. 2021 Board Retreat - August 19 & 20 – Tanque Verde Ranch
 - c. NAA Calendar
- V. Events and Trade Show ReportLinda Coburn, Treasurer
 - a. 2021 Events Calendar
- VI. Leadership Committee Report.....Kim Pacheco, Immediate Past Chair
 - a. 2021 Lyceum Class
- VII. Finance Report.....Courtney LeVinus
 - a. Financial Report **(action needed)**
 - b. Investment Reports **(action needed)**
- VIII. AMAPAC and BGF Reports.....Reid Butler
 - a. AMAPAC Board Participation
 - b. Golfer Events – Phoenix & Tucson
 - c. New BGF Goal – 1-5 Year Plan
- IX. Government Affairs.....John Carlson/Capitol Consulting
- X. Associate Member Council/Phoenix.....Michelle Howland
- XI. Associate Member Council/Tucson.....Sue Campbell
- XII. AMCF / Big Hearts.....Michelle Sinclair/Natalie Evans
- XIII. Communication Committee.....Sarah Fluke
- XIV. Education.....Melissa Lanouette
- XV. Education Conference & Trade Shows
 - a. Phoenix.....Linda Coburn
 - b. Tucson.....Lauren Romero
- XVI. Ethics.....Debbie Willis
- XVII. Membership Committee.....Sarah Fluke
 - a. Membership Reports
 - b. Membership Drive
- XVIII. Tucson Events & Networking.....Lauren Romero

- XIX. Social Responsibility Committees.....Jenica Hickey/Lauren Romero
 - a. Project S.A.F.E. (Phoenix & Tucson)
- XX. President Report.....Courtney LeVinus
 - a. 2021 Dues Update
 - b. AZ Supreme Court Update – AOs
 - c. Vaccinations Update
 - d. Organization Chart
 - e. President Miscellaneous Updates
- XXI. New Business / Old Business
- XXII. Adjourn

Upcoming AMA Board Meeting

Thursday May 6th - 12:00 pm – 4:00 pm – Board of Directors Meeting followed by AMA Dinner Meeting (Location TBD)

Thursday – Friday Aug. 19th & 20th - 12:00 pm Thursday – 2:00 pm Friday – Board of Directors Retreat (Tanque Verde Ranch)

Thursday December 2nd – 11:00 am – 4:00 pm – Board of Directors Meeting Followed by Holiday Party (Location TBD)

ARIZONA MULTIHOUSING ASSOCIATION

Board of Directors Meeting Minutes

Thursday, December 3, 2020

1:00 pm – 4:00 pm

Virtual Meeting

Board Members in Attendance: *Kim Pacheco, Reid Butler, Scott Hines, Linda Coburn, Sue Campbell, John Carlson, Elizabeth Beaulieu, Krisanne Becksted, Lesley Brice, Luz Bruscini, Crystal DeHoag, Anna DiSabato, Kohl Eisenhour, Natalie Evans, Kimberly Fitch, Adam Greco, Kristin Heiple, Robert Hicks, Stacey Hogue, Michelle Howland, Susan Knowles, Matt Koglmier, Sharon Kuhlman, April Morris, John Rials, Lisa Rosenfeld, Mark Schilling, Tina Schreiber, Stacey Searl, Crystal Sevilla, Christine Shipley, Michelle Sinclair, Greg Stobart, David Vanek, Luis Verger, Wendy Weiske, Debbie Willis, Nicole Wray, Rhonda Wooder and Chris Worrell*

Incoming Board Members in Attendance: *Pam McCarthy, Dallin Tippetts, Kris Tomlinson, Chris Walker and Mark Zinman*

Board Members Not in Attendance: *Dahnn Brown, David Connant, David Kotin, Dustin Lacey, Omar Mireles, Gloria Munoz, Lisa Osborne-Warne, Justin Stellenpohl and Carmen Suggs*

Guests: *Grads of Life Representatives; Raphael Rosenblatt (Grads of Life), Sarah Cozenwith (NAA), Mark Wolf (Gateway College) and Catherine Gillesepi-Vargas (Grads of Life)*

Staff/Consultants Present: *Courtney LeVinus, Erika McDowell, Sarah Fluke, Lauren Romero, Jake Hinman, Bastien Andruet, Christina Desaubin, Melissa Lanouette and Jenica Hickey*

Meeting Sponsors: *Ally Waste Services, Renco Roofing and Windom Security Group*

Kim Pacheco called the meeting to order at 1:01pm.

Guest Presentation

Representatives from Grads of Life presented their program which focuses on providing vocational training that assists students in obtaining employment after graduation. In 2021 they will re-launch their Apartment Maintenance Technician program at Gateway college which will prepare students for an internship in property maintenance. AMA members interested in using the program for recruitment are encouraged to inquire with Sarah Fluke. More information can be found the December 3 Board Meeting Page of the AMA website.

The Annual Membership meeting was called to order at 1:35pm. Minutes have been provided to the committee.

The Annual Meeting of the Shareholders was called to order at 1:37pm. Minutes have been provided to the committee.

Kim Pacheco called the Board of Directors Meeting back to order at 1:39pm after the Annual Meeting of the Shareholders.

New Business

Kim Pacheco presented the Consent Agenda.

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

Chair Report

Kim Pacheco welcomed and introduced new and returning Board members.

John Carlson swore in the following new and returning Board members:

Returning and New Regular Board Members with terms ending in 2023 (2021 or 2022 where indicated)

Kim Pacheco	Scotia Group
Dahnn Brown	Camden Property Trust
Luz Bruscini	MEB Management Services
John Carlson	Mark -Taylor Residential
Anna DiSabato	Dunlap & Magee
Natalie Evans	CoStar / Apartments.com (term through 2022)
Dustin Lacey	Mark-Taylor Residential
Pam McCarthy	Fairfield Residential (term through 2021)
April Morris	Cox Communications (term through 2022)
Gloria Munoz	Maricopa County Housing Authority
Lisa Osborn Warne	Priderock Capital Partners
John Rials	Western Wealth Capital
Mark Shilling	MEB Management Services
Stacy Searl	Weidner
Justin Stettenpohl	P.B. Bell Companies
Greg Stobart	MG Properties
Dallin Tippetts	Rainforest Plumbing & Air (term through 2022)
Kris Tomlinson	Pinnacle / Cushman Wakefield (term through 2022)
Louis Verger	Shelton Residential
Chris Walker	Law Office of Scott M. Clark, P.C. (term through 2022)
Nicole Wray	Greystar
Mark Zinman	Zona Law (term through 2022)

John Carlson swore in the following 2020 Officers:

Installation of 2020 Officers

Chair of the Board – Reid Butler
Vice Chair – Scott Hines
Treasurer – Linda Coburn
Secretary – Tina Schreiber
Immediate Past Chair – Kim Pacheco
AMC Executive – Sue Campbell

Kim Pacheco recognized the outgoing Board Members, which included David Connant, Matt Koglmeier, Susan Knowles and Carmen Suggs. There were no Emeritus Board Members or Current Lyceum class participants in attendance.

BGF Update

Kim Pacheco noted that the 2020 BGF goal of raising \$1 Million has been exceeded by nearly \$46,000.

NAA Update

Kim Pacheco gave the NAA Update on the 2021 events: March 9-10 (tentative) – NAA Advocate in Washington DC; June 16-18 – NAA Apartmentalize in Chicago, IL, and November 2-4 – Assembly of Delegates (AOD) in Cincinnati, OH.

2020 Accomplishments

Kim Pacheco recapped AMA highlights for 2020 and thanked the Board and AMA staff for their active involvement in seeing these goals to fruition.

Vice Chair Report

Reid Butler referred the Board Members to page 9 of the Board Report to review the 2021 Committee Chairs. Butler and LeVinus expressed an extra special thanks to the Government Affairs Committee for a job well done in an especially challenging year.

Butler reviewed upcoming Board Meeting and Town Hall dates. Courtney LeVinus has sent out calendar invites for each event, as well.

Butler discussed aspirational, inspirational and measurable goals for 2021 and proposed the unofficial challenge of raising membership to 315,000 units by the end of the year.

Leadership Committee Report

John Carlson announced that recognition of the 2020 Lyceum Graduation Class and announcement of the Kimberly Fitch Award recipient will be postponed to the March 5, 2021 Board Meeting at Seasons 52.

Courtney LeVinus added that applications for the 2021 Lyceum class are open now through January 15, 2021.

Finance Report

Courtney LeVinus reviewed the financial statements and the financial dashboard for the period ending October 31, 2020. The AMA had a gross revenue of \$2,198,136, a net revenue of \$130,938, and a projected end of year (EOY) loss of \$145,491. Loss is indicative of a worst-case scenario where in AMA's PPP loan is not forgiven. If the PPP loan is forgiven in its entirety, the Association can expect a net gain of \$3,000 for the year.

See Financial Reports for details.

Sue Campbell **made a motion** to approve the Finance Report. A **second** was made by Crystal DeHoag. **Motion Passed.**

Investment Report

LeVinus presented the Investment Report. Investment ending value as of October 31, 2020 stands at \$1.1 million. BGF investments sit at \$833,000. AMA will be meeting with their broker in 2021 to discuss a possible reallocation of funds as markets shift due to Covid-19.

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

Budget Report

Courtney LeVinus presented the 2021 Budget Report. Courtney reviewed the major variances report and summarized the budget highlights. See 2021 Budget for details.

Sue Campbell **made a motion** to approve the Budget Report. A **second** was made by Elizabeth Beaulieu. **Motion Passed.**

AMAPAC and BGF Committee

Reid Butler provided an update on AMAPAC/BGF Voluntary dues and Board participation. The BGF goal of \$1 million for 2020 has been exceeded by nearly \$46,000. Butler anticipates seeing a drop in BGF fundraising as AMA will be shifting its focus to more PAC fundraising in 2021.

Government Affairs Committee

Jake Hinman overviewed November election results and the impact to the multi-housing industry. Hinman predicts a favorable 2021 for the industry as the legislature did not flip and the Governor does not seem to be in favor of extending the eviction moratorium past 2020. Prop. 117 passed which will cap property taxes. This has caused assessors to value new builds higher than anticipated amounts. AMA is looking into an appeals process for members.

Hinman reviewed the AMA 2021 Government Affairs Policy additions of items #2 & 3:

- 2. Protect and Preserve Private Property and Contract Rights
 - Oppose any efforts to create statewide eviction moratoriums.
 - Oppose any efforts to diminish private property rights in the state.
 - Support efforts to limit the executive branch's emergency powers.
- 3. Support Short and Long-term Solutions for Rental Assistance
 - Support efforts to streamline and consolidate rental assistance programs.
 - Support funding solutions for rental assistance programs.

Sue Campbell made a **motion** to approve. A **second** was made by Michelle Sinclair. **Motion Passed.**

Membership Committee Report

Sarah Fluke gave an update that we currently have 301,863 units in Membership. Fluke reminded Board members that membership billing is moving from an anniversary renewal to a calendar year renewal in 2021 for all members. Board members are asked to remind their staff of this change to eliminate billing confusion.

Tribute Awards 2020 & 2021 Update

Scott Hines reported 2020 saw 650 nominations from 34 member companies. Despite Covid, and with the help of more than 575 volunteer hours, AMA was able to hold a virtual Tribute Awards ceremony for 1,572 viewers.

Nominations for 2021 will be accepted January 5 – February 15, 2021.

The 2021 Tribute Awards will be held on August 13, 2021. The committee is looking into options for a hybrid event.

President Report

2021 Calendar of Events – Courtney LeVinus referred to the PowerPoint and to page 61 in the Board Packet.

Bylaws Update – LeVinus reviewed proposed amendments to the Board Bylaws.

- Section 3.4: TERM – Membership shall be for a term of one-year commencing with the first day of January. Terms previously ran a full-year from the date dues were received.
- Section 7.2: STANDING COMMITTEES – Phoenix Education Conference & Trade Show Committee changing name to Phoenix Events & Trade Show Committee.

Sue Campbell **motioned** to approve. Kim Fitch made a **second** motion. **Motion passed.**

Board Policy Update – LeVinus reviewed proposed amendments to the Board Policy

- Section 8.12
 - Committee name change from Phoenix Education Conference and Tradeshow Committee to Phoenix Events and Tradeshow committee.
 - Education committee will plan the education classes of AMA's Education Conference and Tradeshow.
 - Committee will encourage participation to all events beyond the Education Conference and Tradeshow.
 - Committee will plan all AMA dinner meetings, golf tournaments, maintenance mania and special events as needed.

Sue Campbell **motioned** to approve. Chris Walker made a second motion. **Motion passed.**

2021 Board Goals – Courtney LeVinus went over the past and most recent list of accomplishments and the new 2021 AMA goals that were determined at the Annual Board Retreat.

Organization Chart – Courtney LeVinus referred to the organization chart noting some slight restructuring and new team members.

President Miscellaneous Update

Courtney LeVinus announced that AMA would be sending out electronic versions of the Conflict of Interest and Board Member Agreement forms for Board Members' signature. She ended by welcoming new Board Members and thanking the Executive Officers, current Board Members and the AMA Staff.

New Business/Old Business

Natalie Evans of CoStar gave an update of current market conditions. Reports will be made available on the AMA Board webpage.

No old business to report.

Kim Pacheco adjourned the meeting at 3:36 pm.

2021 Tribute Awards

Scott Hines, Chair

Friday, August 13, 2021

The AMA received 750 nominations from 33 member companies. Judging runs March 9 through April 9.

Tribute Award Enhancements 2021

- Two New Categories Added
 - Best Community Team – Student Housing
 - Best Community Team – 300+ Units
- Dates of judging for each category were supplied at the time nominations opened, allowing nominees and nominators to save the date.
- All nominees received an email with the date of each category and a “Helpful Tips” document and “What to expect” video to prepare them for the process.
- Initial interview information was emailed to all nominees well in advance of their scheduled date and time.
- Congratulation letters reiterating interview information were also printed and mailed.

We are hopeful that this event can be held in person, and we are researching venue options.

NAA Report Scott Hines

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2021 NAA Delegates and Alternates for Arizona

Delegates:

Kim Pacheco, Scotia Group
Reid Butler, Butler Housing
Scott Hines, PEM
Linda Coburn, NexMetro
Sue Campbell, Redi Carpet
Tina Schreiber, Greystar Residential
Lesley Brice, MC Companies

Alternates:

Chris Evans, HSL
Mike Clow, Greystar
Courtney LeVinus, Arizona Multihousing Association
Crystal DeHoag – Bella Investments
Mark Zinman – Zona Law
Chris Walker – Law Offices of Scott Clark
Adam Greco- Burns Pest Elimination

2021 NAA Events

- March 8 – **NAA Advocate, Virtual** – Registration is open.
- August 31-September 2 – **NAA Apartmentalize, Chicago, IL** – Early discounted registration is now open (NOTE DATE CHANGE)
- November 2-4 – **Assembly of Delegates (AOD), Cincinnati, OH**

Events Committee (Phoenix)

Linda Coburn, Chair

Adam Greco, Vice-Chair

2021 Upcoming Events

Phoenix Golf Tournament

- March 26, 2021 – Stonecreek Golf Club

Lawn Games Tournament

- May 14, 2021 – Shalimar Golf Course

Reverse Trade Show

- June 11, 2021 – Phoenix Convention Center

Maintenance Mania

- June 11, 2021 – Phoenix Convention Center

Annual Tribute Awards

- August 13, 2021 – Location TBD

Phoenix Education Conference & Trade Show

- September 16, 2021 – Phoenix Convention Center
 - Perspectives & Projections will be included in this event

Foot Golf Tournament

- October 29, 2021 – Shalimar Golf Course

Leadership Development Committee

Kim Pacheco, Chair

2020 Lyceum Class hosted a blanket drive for their community service project. Blankets were collected both in Phoenix and Tucson supporting UMOM New Day Centers and Tucson Homeless Connect. A total of 586 blankets were donated. The approved 2021 Lyceum class includes the members below.

The 2021 Lyceum Class

Regular Members			
Ruben	Chavez	Nicolosi & Fitch, Inc	valleyview@nicolosifitch.com
Jessica	Esquivel	Pardi Properties LLC	jessesquivel11@gmail.com
Angelica	Felix	Mark-Taylor Residential	angelica.felix@mark-taylor.com
Bianca	Flores	Fairfield Residential	bflores@ffres.com
Monica	Gatlin	P.B. Bell	mgatlin@pbbell.com
Brianna	Gerber	Scotia Group Management, LLC	opmanager@scotiagroup.com
Melissa	Guzman	Mark-Taylor Residential	mguzman@mark-taylor.com
Jamie	Hinz	Greystar Real Estate Partners	jamie.hinz@greystar.com
Ashley	Hunter	IDM Companies	ashley.hunter@liveidm.com
Sarah	Kawaguchi	Greystar Real Estate Partners	skawaguchi@greystar.com
Jennifer	McKone	Greystar Real Estate Partners	jennifer.mckone@greystar.com
Julie	Patrick	Greystar Real Estate Partners	jpatrick@greystar.com
Cari	Rascon	Nicolosi & Fitch, Inc	crascon@nicolosifitch.com
Bertha	Soto	Shelton Residential	bertha.soto@assetliving.com
Heather	Stroh	CWS	hstroh@cwsapartments.com
Kristen	Taylor	Mark-Taylor Residential	Kristen.taylor@mark-taylor.com
Colleen	Yonker	Asset Living	colleen.yonker@assetliving.com
Associate Members			
Nick	Andrella	Redi Carpet	nick.andrella@redicarpet.com
Terry	Bridges	Rose Paving	tbridges@rosepaving.com
Andrea	Cabon	Cox Communications	Andrea.Cabon@cox.com
Donna	Close	American Roofing & Waterproofing LLC	donnac@americanroofingnow.com
Noelia	Coria	Kowalski Construction, Inc.	noeliac@kowalski.com
Adam	Greco	Burns Pest Elimination	adamg@burnspestelimination.com
Dustin	Kerby	Smart Pest Solutions	Dustin@smartpestaz.com
Brandi	Reynolds	RENCO Roofing	brandir@rencoroofing.com

2021 Lyceum Class Schedule:

February 26, 2021

May 21, 2021

October 15, 2021

December 2, 2021

Finance Report Courtney LeVinus

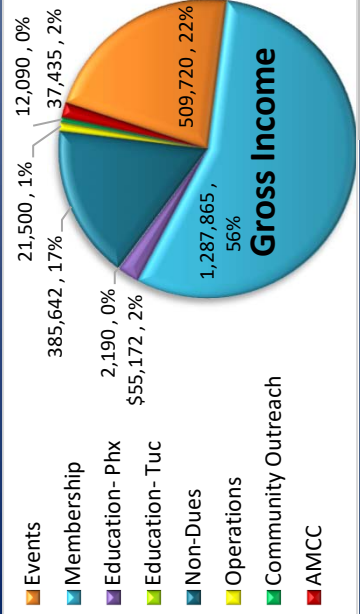
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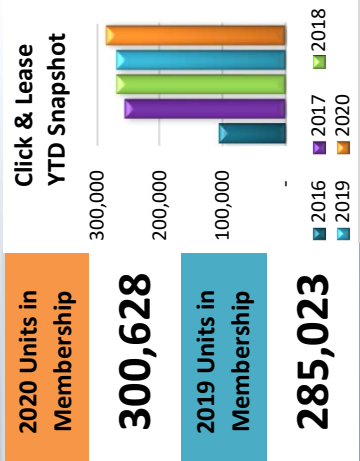
Financial Dashboard

Gross Revenue	EOY Net Loss	AMA & AMCC Cash	General Investments
\$ 2,311,614	\$ (68,597)	\$ 1,175,381	\$ 1,219,376

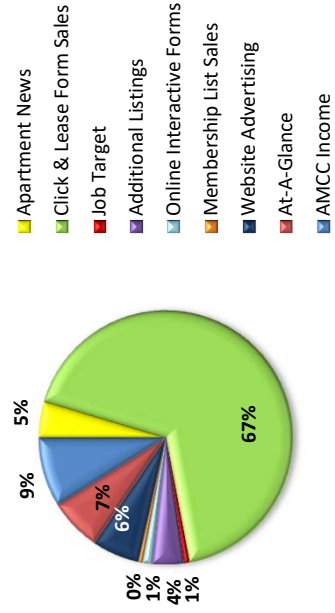
BGF Investments	BGF Cash	Total BGF Balance	Net Increase to BGF	AMAPAC Cash	AMCF Cash	Total Membership	2020 Unit Growth
\$ 1,009,476	\$ 48,086	\$ 1,158,472	\$ 364,934	\$ 15,561	\$ 101,239	2,296	15,605



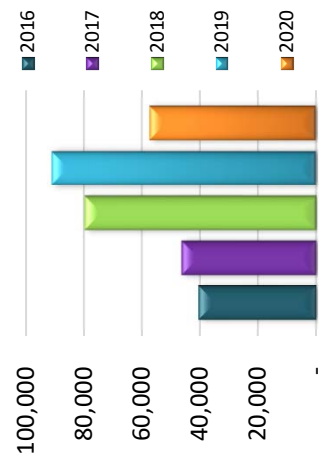
Membership Renewals YTD		
	Actual %	Budget %
Regular Members	94.7%	90.9%
Associate Members	73.4%	75.0%
Membership New Dues YTD		
	Actual	Budget
Regular Members	\$55,138	\$106,577
Associate Members	\$21,477	\$53,130



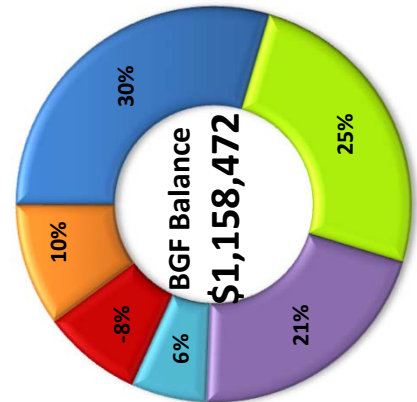
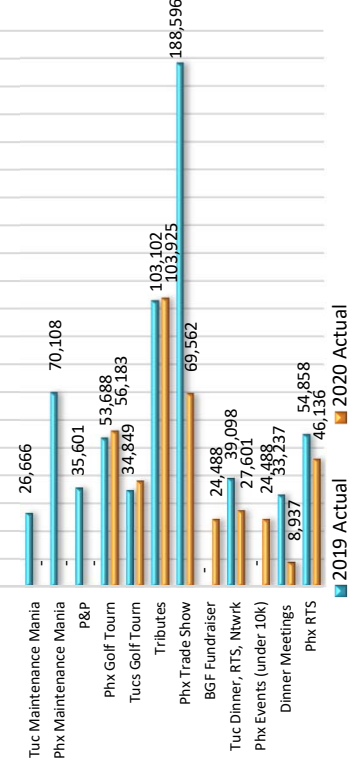
Non-Dues & AMCC Revenue



Education Revenue 2016 - 2020 YTD

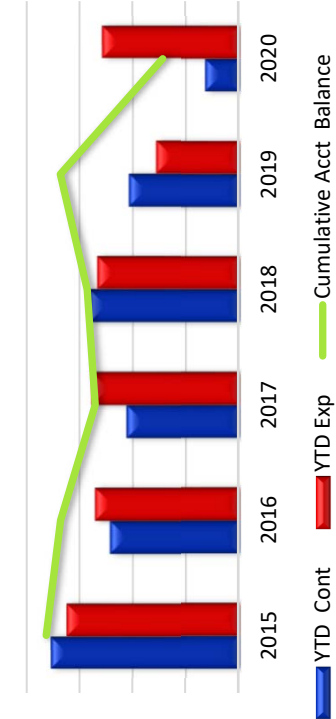


Event Revenue (Less Direct Expenses) \$375,004



* Figures are based off of amount billed and will change slightly as some members opt out of the voluntary \$100 or drop out of membership. EOY reserve of \$5400 established to offset anticipated

AMAPAC Snapshot thru December 31, 2020



AMCF Snapshot
Scholarship Fund
\$ 101,674
Phx Net Fundraising
\$ 24,764
Tuc Net Fundraising
\$ 18,788



AMA & AMCC Summary Financial Report Period Ended December 31, 2020

The Arizona Multihousing Association and its Subsidiary have a yearend unrestricted net deficit of \$68,597 which is \$76,894 better than the worst-case scenario presented in October. The yearend unrestricted deficit does not include the \$149,103 PPP loan. The Association has submitted all required documentation and is pending loan forgiveness. With regard to temporarily restricted funds, the Better Government Fund had a yearend net surplus of \$364,934. The yearend results will be outlined in the following pages as they relate to each department with comparisons to 2019 where applicable.

- **Membership revenue** yearend results were favorable to budget by \$44,333 which was \$216 more than forecasted in October, and \$54,624 or 4.4% better than December 2019. While overall membership is favorable, new member income is significantly down and can be attributed to a few factors. In prior years, members who dropped out of membership and rejoined were classified as new members. Beginning in 2020, members who drop out of membership and rejoin within a year are now recorded as renewals. Additionally, prior to 2020 membership deferred revenue was adjusted annually, whereas now new dues are deferred based on the month in which membership begins.
 - **Regular Dues** year end budget surplus was \$55,112 and \$68,803 better than 2019 results. This comparison includes removing the BGF million-dollar initiative line item that relates to the 2020 dues BGF surcharge for a more accurate historical comparison. New dues revenue is unfavorable to budget by \$51,439 and is net of \$44,738 related to 2021 income presently deferred on the balance sheet. Approximately \$86,826 of the 2020 dues billed is related to the .50¢ BGF dues increase and has been redirected to the BGF temporarily restricted income.
 - **Associate Dues** are unfavorable to budget by \$7,474 which is \$14,359 or 6.7% less than December 2019. New dues revenue is unfavorable by \$31,653 which is net of \$11,801 related to 2021 revenue deferred on the balance sheet.
- **Membership expenses** at year end were favorable to budget by \$21,590 and primarily attributable to reduced travel, printing, and allocated compensation expenses.
- **Membership Non-Dues revenue** ended the year better than budget by \$29,453 and better than 2019 by \$10,732 or 2.9%. The variance primarily relates to better than budgeted Click & Lease revenue totaling \$44,780 which is \$16,231 higher than 2019. Website advertising and additional listing income fell short by \$15,130 and \$2,230 respectively.
- **Membership Non-Dues expenses** yearend results are better than budget by \$19,024 and is the result of decreased print and production, credit card processing fees and allocated compensation.
- **Phoenix Education revenue** ended the year unfavorably by \$30,273 and is \$26,375 or 32.3% less than December 2019 and is a direct result of approximately 50% reduced designation course attendance, class cancellations, and offering free webinars in the second quarter.
- **Phoenix Education expenses** at year end were favorable to budget by \$8,430, primarily due to decreased participation in designation courses which decreased the course material costs and decreased travel expenses. Compared to 2019, expenses were down by \$10,283 or 26.9%,



AMA & AMCC Summary Financial Report Period Ended December 31, 2020

- **Tucson Education revenue** ended the year unfavorable to budget by \$4,240 due to less than anticipated participation, class cancellations and free webinars offered in the second quarter and revenue is \$7,290 less than December 2019. Expenses were favorable by \$2,412 due to unused location expenses.
- **Events** that were held through yearend had a net unfavorable variance to budget of \$344,447 and is \$329,265 or 46.8% less than compared to December 2019.
 - **Tucson Golf Tournament (September)** net income was \$38,172 and was originally scheduled to occur in March. Net revenue from this event per the original budget was redirected to the BGF as donor restricted income and will not be used toward the Association's general operating expenses. Budgeted revenue expectations were exceeded by \$5,037 and was the first AMA in person event since March. Revenues were also favorable compared to 2019 by \$3,323.
 - **AptUnite Virtual Education Conference (October)** was cultivated with 3 different learning tracks to appeal a broader range of members' education needs and provided virtual networking opportunities. The net income was \$69,562 and the net unfavorable impact of cancelling both the Phoenix and Tucson Trade Shows and Perspectives & Projections was \$203,131.
 - **Phoenix Golf Tournament (October)** net income was \$56,183, which was \$3,093 better than budget and \$2,495 better than 2019 results. Net revenue from this event per the original budget was redirected to the BGF as board designated restricted income and will not be used toward the Association's general operating expenses.
 - **Phoenix & Tucson Maintenance Mania (November)** events were cancelled, and the net impact to the 2020 budget was \$80,566.
 - **BGF & PAC Phoenix and Tucson Golf Fundraisers:** net income was \$24,488 and is donor restricted income.
- **Operations expenses** are favorable to budget by \$68,583 and \$12,338 more than compared to December 2019. Details outlining the variances are below:
 - **Compensation & Benefits** are favorable to budget by \$93,492 and are \$68,176 higher than December 2019. The budget variance is primarily due to the timing of the Deputy Director position and hiring from within the organization vs hiring an additional staff member, staffing changes and reduced taxes and benefits. If the PPP loan is forgiven, the PPP loan will reduce compensation by approximately \$104,000.
 - **Other Employee related expenses** are favorable to budget by \$14,206 and is related to staff participation at NAA events and employee training.
 - **Occupancy & Related expenses** are unfavorable by \$7,578 primarily due to increased business insurance costs \$2,367 and decreased internal reallocated expenses due to decreased overall expenses. If forgiven, the remaining 30% of the PPP loan will reduce expenses related to rent and utilities.



AMA & AMCC Summary Financial Report Period Ended December 31, 2020

- **Board expenses & sponsorships** yearend net favorable variance is \$51,826; \$82,326 related to reduced board meeting and delegate travel expenses, and decreased board sponsorship revenue of \$30,500 due to virtual attendance.
- **Administrative expenses** excluding the board line items are favorable due to significantly reduced credit card processing fees due to significantly less revenue. No bad debt reserve was necessary in 2020, as AR collection rates exceeded the need to add to the reserve. The AMCF administration fee is also included in this group of expenses. Due to significantly reduced fundraising dollars raised, management has proposed to waive the administration fee for the year to maximize contributions to local charities.
- **Government Affairs** had a yearend favorable variance of \$26,099 primarily due to the reduction in sponsored events paid to other organizations, travel expenses and staffing changes. Expenses compared to last year end were \$55,347 higher and primarily related to increased compensation allocations and contracts including the PR firm. 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** at year end had an unfavorable variance of \$4,030 and is the result of decreased Project S.A.F.E registrations. Compared to 2019, revenue is down by \$99,183 due to the non-renewal of the Smoke-Free Grant. Expenses were favorable to budget by \$13,832 and is attributable to unused travel and allocated compensation.
- **AMCC** yearend net variance was favorable to budget by \$11,850 and is \$14,723 better than 2019. The favorable variance is primarily related to higher than anticipated revenue from our insurance partner, Crest.

The Association will continue to make every effort to keep events on the 2021 calendar if we are able to comply with the mandated regulations. We continue to work hard to identify other events that can replace some indoor events with outdoor events if more restrictions are implemented and are forced to cancel more indoor events.

AMA & Subsidiary deficit at December 31, 2020
(68,597)
Board Approved Budget
717
Surplus Detail:
Revenue increase (decrease)

Regular Dues	55,112
Associate Dues	(7,474)
Click & Lease revenue	44,780
Additional Listings	(2,230)
Website	(15,130)
Phx & Tuc Education Net	(23,851)
Events	(344,447)
Crest Affinity Programs	8,435
Project S.A.F.E	(4,030)

Expense (increase) decrease

Membership Printing & Bank Fees	6,343
Operations Comp & Benefits	93,492
NAA Travel	31,414
Occupancy & Related (CAM & Utilities and Office Supplies)	10,327
Board Sponsorships & Expenses	51,826
Admin Exp (Bank & CC fees, training, & Misc)	20,137
Audit	(1,147)
Legal	1,727
GA Sponsorships	9,037
Variances under \$2,000	(8,178)

Budget deficit
(69,314)
Year Ended December 31, 2020 Unrestricted Deficit
(68,597)
**Year Ended December 31, 2020 Temporarily
 Restricted & Board Restricted BGF Surplus**
364,934

ASSETS:

LIABILITIES & EQUITY:

ARIZONA MULTITHOUSING ASSOCIATION & SUBSIDIARY
STATEMENT OF ACTIVITIES / REVENUES AND EXPENSES
Year Ended December 31, 2020 and 2019

	2020 Actual	Board Approved Budget	Favorable (Unfavorable)	Percentage	Prior Year - Actual	Favorable (Unfavorable)	Percentage
Income							
Membership (pg 4)	\$ 1,287,865	\$ 1,243,532	\$ 44,333	3.57 %	\$ 1,233,241	\$ 54,624	4.43 %
Membership Non-Dues (pg 6)	385,642	356,189	29,453	8.27	374,910	10,732	2.86
Education - Net of Direct Expenses (pg 7-8)	29,008	52,859	(23,851)	(45.12)	52,182	(23,174)	(44.41)
Events - Net of Direct Expenses (pg 9-15)	375,004	719,451	(344,447)	(47.88)	704,269	(329,265)	(46.75)
	<u>2,077,519</u>	<u>2,372,032</u>	<u>(294,513)</u>	<u>(12.42)</u>	<u>2,364,602</u>	<u>(287,083)</u>	<u>(12.10)</u>
			0.00			-	
Expenses							
Membership (pg 5)	355,987	377,577	21,590	5.72	351,415	(4,572)	(1.30)
Membership Non-Dues (pg 6)	134,719	153,743	19,024	12.37	119,182	(15,537)	(13.04)
Education Compensation (pg 7-8)	106,523	108,923	2,400	2.20	103,119	(3,404)	(3.30)
Events (pg 15) - net	480,702	546,552	65,850	12.05	430,019	(50,683)	(11.79)
Operations (pg 16-17)	357,945	426,528	68,583	16.08	345,607	(12,338)	(3.57)
Government Affairs (pg 18)	555,015	581,114	26,099	4.49	499,668	(55,347)	(11.08)
Community Outreach (pg 19)	81,972	91,774	9,802	10.68	58,043	(23,929)	(41.23)
	<u>2,072,863</u>	<u>2,286,212</u>	<u>213,349</u>	<u>9.33</u>	<u>1,907,053</u>	<u>(165,810)</u>	<u>(8.69)</u>
			0.00			-	
Other Income (Expense):	4,656	85,820	(81,164)	(94.57)	457,549	(452,893)	(98.98)
AMCC - Surplus (Deficit) (pg 20)	(73,253)	(85,103)	11,850	N/A 13.92	(87,976)	14,723	16.74
	<u>(73,253)</u>	<u>(85,103)</u>	<u>11,850</u>	<u>13.92</u>	<u>(87,976)</u>	<u>14,723</u>	<u>(16.74)</u>
Total Other Income (Expense)			0.00			-	
			11,850			14,723	
	<u>\$ (68,597)</u>	<u>\$ 717</u>	<u>\$ (69,314)</u>	<u>%</u>	<u>\$ 369,573</u>	<u>\$ (438,170)</u>	<u>(118.56) %</u>
			0.00			-	

ARIZONA MULTITHOUSING ASSOCIATION & SUBSIDIARY
STATEMENT OF CASH FLOWS
Year Ended December 31, 2020 and 2019

RECONCILIATION OF WORKING CAPITAL ITEMS

	2020	2019		2020	2019
<u>CASH FLOWS FROM OPERATING ACTIVITIES:</u>			NET (INCREASE) DECREASE IN ASSETS:		
Net Income (Loss)	\$ (68,597.00)	\$ 369,573.00	Receivables -		
Adjustments to reconcile Net Income to Net Cash					
Depreciation & Amortization	23,700.00	22,308.00			
Net Change in Operating Assets	5,374.00	278,993.00			
Net Change in Operating Liabilities	861,002.00	(41,482.00)	Net Receivables	730.00	237,946.00
NET CASH PROVIDED BY (USED IN) OPERATING ACTIVITIES	821,479.00	629,392.00	Prepays:		
			Events	24,078.00	(6,520.00)
			Other	(19,434.00)	47,567.00
			Other Assets	-	-
			Net Change in Operating Assets	\$ 5,374.00	\$ 278,993.00
<u>CASH FLOWS FROM INVESTING ACTIVITIES:</u>			NET INCREASE (DECREASE) IN LIABILITIES:		
Investments	(816,772.00)	(602,794.00)	Accounts Payable & Credit cards	\$ 102,960.00	\$ 1,534.00
Investment Income - Directly to Equity	51,772.00	(7,206.00)	Accrued Expenses:		
Property & Equipment	(15,502.00)	(39,090.00)	Payroll	(1,257.00)	504.00
(Increase) Restricted Cash	47,643.00	69,281.00	Payroll Liabilities	(1,657.00)	2,368.00
NET CASH PROVIDED BY (USED IN) INVESTING ACTIVITIES	(732,859.00)	(579,809.00)	Expenses	(704.00)	(2,062.00)
<u>CASH FLOWS FROM FINANCING ACTIVITIES:</u>			Vacation & Other Compensation	8,825.00	12,666.00
Change in Intercompany Balance - net	(4,717.00)	(6,013.00)	Deferred Rent	567.00	3,966.00
			Other	(1,645.00)	4,420.00
NET CASH PROVIDED BY (USED IN) FINANCING ACTIVITIES	(4,717.00)	(6,013.00)	Deferred Revenue:		
			Membership	93,990.00	(280,701.00)
			Events	63,896.00	(9,061.00)
			Other	31,093.00	(57,746.00)
<u>NET INCREASE (DECREASE) IN CASH</u>	83,903.00	43,570.00	Long term Liabilities:	-	-
CASH BALANCE:			Restricted Funds	564,934.00	282,630.00
BEGINNING BALANCE	1,091,479.00	1,047,909.00	Net Change in Operating Liabilities	\$ 861,002.00	\$ (41,482.00)
ENDING BALANCE	\$ 1,175,382.00	\$ 1,091,479.00	Net Change in Working Capital	\$ 866,376.00	\$ 237,511.00

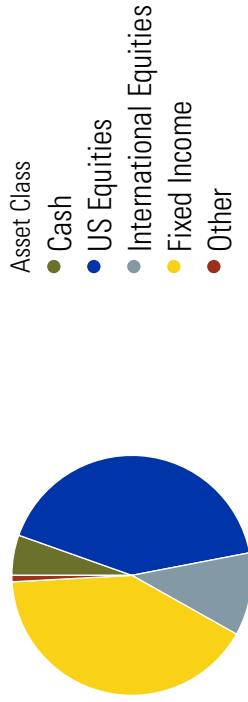
Portfolio Performance Summary

As of December 31, 2020

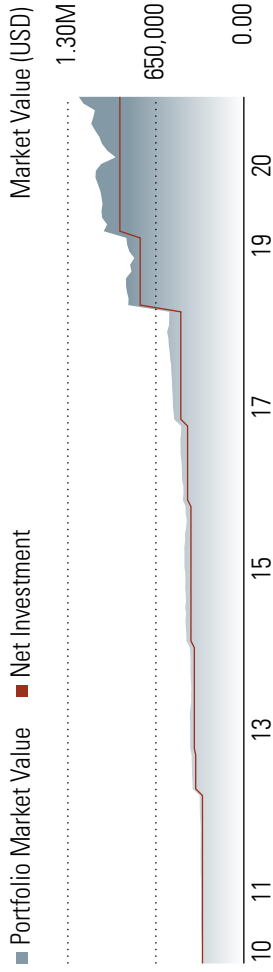
Primary Benchmark
S&P 500 TR USD

Return Type
Time-Weighted Rate of
Return (TWR)

Asset Allocation



Portfolio Growth



values are as of month end*

Portfolio Return (%)

	QTD 10/1/2020 - 12/31/2020	YTD 1/1/2020 - 12/31/2020	1-Yr 1/1/2020 - 12/31/2020	3-Yr 1/1/2018 - 12/31/2020	5-Yr 1/1/2016 - 12/31/2020	10-Yr 1/1/2011 - 12/31/2020	Since Perf Start 4/1/2010 - 12/31/2020
S&P 500 TR USD (%)	9.70	11.23	11.23	6.63	6.25	3.86	3.84
BBgBarc US Agg Bond TR USD (%)	12.15	18.40	18.40	14.18	15.21	13.88	13.78
MSCI ACWI Ex USA NR USD (%)	0.67	7.51	7.51	5.34	4.43	3.84	4.01
	17.01	10.65	10.65	4.88	8.92	4.92	5.44

Portfolio Changes

Beginning Value (USD)	1,111,564.43	1,096,235.26	1,096,235.26	557,017.62	450,307.10	314,162.14	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	500,000.00	610,000.12	610,176.90
Cash In (USD)	0.00	0.00	0.00	450,000.00	500,000.00	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)	107,811.85	123,141.02	123,141.02	212,358.66	269,069.17	295,214.02	303,640.59
Ending Value (USD)	1,219,376.28	1,219,376.28	1,219,376.28	1,219,376.28	1,219,376.28	1,219,376.28	1,219,376.28
Ending Accrued Interest (USD)	0.00	0.00	0.00	0.00	0.00	0.00	0.00

As of December 31, 2020 you have Funds Available of \$15,692.98.

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 December 31, 2020

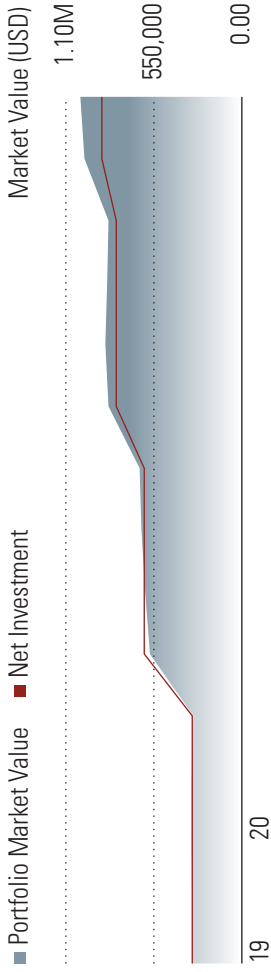
Primary Benchmark
S&P 500 TR USD

Return Type
Time-Weighted Rate of
Return (TWR)

Asset Allocation



Portfolio Growth



values are as of month end*

Portfolio Return (%)

	QTD 10/1/2020 - 12/31/2020	YTD 1/1/2020 - 12/31/2020	1-Yr 1/1/2020 - 12/31/2020	3-Yr 1/1/2018 - 12/31/2020	5-Yr 1/1/2016 - 12/31/2020	10-Yr 1/1/2011 - 12/31/2020	Since Perf Start 11/20/2019 - 12/31/2020
S&P 500 TR USD (%)	8.78	8.83	8.83	—	—	—	9.69
BBgBarc US Agg Bond TR USD (%)	12.15	18.40	18.40	14.18	15.21	13.88	20.25
MSCI ACWI Ex USA NR USD (%)	0.67	7.51	7.51	5.34	4.43	3.84	6.83
	17.01	10.65	10.65	4.88	8.92	4.92	13.06

Portfolio Changes

Beginning Value (USD)	841,830.92	315,844.58	315,844.58	—	—	—	310,000.00
Beginning Accrued Interest (USD)	0.00	0.00	0.00	—	—	—	0.00
Net Cash Flow (USD)	90,000.00	565,000.00	565,000.00	—	—	—	565,000.00
Cash In (USD)	90,000.00	565,000.00	565,000.00	—	—	—	565,000.00
Cash Out (USD)	0.00	0.00	0.00	—	—	—	0.00
Investment G/L plus Income (USD)	77,644.76	128,631.10	128,631.10	—	—	—	134,475.68
Ending Value (USD)	1,009,475.68	1,009,475.68	1,009,475.68	—	—	—	1,009,475.68
Ending Accrued Interest (USD)	0.00	0.00	0.00	—	—	—	0.00

As of December 31, 2020 you have Funds Available of \$19,855.08.

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

Group: AMA (BGF)

AMAPAC

Reid Butler, Chairman

AMAPAC Campaign Finance Report

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

- Current Secretary of State Balance: \$16,065.86 as of January 15, 2021
- PAC Alliance Bank Balance: \$15,561 as of December 31, 2020
- Variance between Alliance Bank and Secretary of State balances due to contributions made to candidates after the last Secretary of State reporting cycle.

Balances as of December 31, 2020 are as follows:

- BGF RBC Investment Account balance: \$1,009,476
- BGF Cash in Alliance Bank: \$48,086
- BGF voluntary contributions and Board contributions through 12/31 are approximately \$301,867; Tucson Golf net income \$37,918, Phx Golf Tournament net income \$56,183 and .50¢ dues increase through 12/31- \$97,224 (includes collected, outstanding and cancelled (dropped) invoice balances).
- Approximately \$100,910 is pending transfer and \$17,540 relates to the voluntary contributions, and both Phx & Tucson Golf tournaments. As a side note, since last report, outstanding AR has decreased by \$35,135.
- Total BGF: \$1,158,472 (BGF Inv + Alliance Cash + Pending TRX)

Snapshot of 2021 BGF portion of membership dues and voluntary contributions YTD:

- Approximately \$133,618 of voluntary BGF contributions have been collected and \$32,850 remains outstanding.
- Approximately \$123,683 has been collected that relates to the .50 cent BGF dues surcharge and approximately \$17,000 is still outstanding.
- For a total of an additional \$257,301 pending transfer to BGF.
- **2021 YTD BGF Balance approximately \$1,397,520.**

State of Arizona



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

2021 Q4 Report

Election Cycle: 2020
Date Filed: January 15, 2021
Reporting Period: October 18, 2020-December 31, 2020

Summary of Finances

Cash Balance at Beginning of Reporting Period:	\$15,077.73
Total Cash Receipts this Reporting Period:	\$1,105.00
Total Cash Disbursements this Reporting Period:	\$116.87
Cash Balance at End of Reporting Period:	\$16,065.86

Report ID: 217462

Associate Member Council Advisory Board (Phoenix)

Michelle Howland, Chair

The AMC meeting on February 18 was held as scheduled; the virtual host was P.B. Bell and 68 members registered to attend. The next AMC meeting is scheduled for April 15 with Shelton Residential/Asset Living as our virtual host. 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 32 member-properties. If you have an interest in hosting a meeting in 2021, please contact Michelle Howland.

AMCAB helped AMA staff revise and create new vendor directory categories for the online vendor directory. The group started with 332 categories and pared down to 125 categories. The new vendor directory was rolled out at the beginning of February with marketing to all associates to select their new categories. Each associate member now receives three free categories with membership.

For 2021, AMCAB will complete another project to include reviewing and revising the Patron Member program benefits. The group has begun discussion on what benefits are important, what

benefits can go away, and what new benefits should be added. The goal is to continue to make the program relevant and worthwhile for our top spending Associates and to continue to give them the recognition they deserve.

Associate Member Council (Tucson)

Sue Campbell, Chair

The Tucson Associate Member Council has postponed their meetings due to COVID.

Save the Date – 2021 AMC Tucson Schedule (tentative):

- March 25, 2021
- September 9, 2021

AMCF Big Hearts

Michelle Sinclair & Tina Greco, Phoenix Co-Chairs



Phoenix

- Total net funds raised in 2020 was \$24,763.93
- AMCF Phoenix closed out 2020 with virtual “First Friday” events including trivia and a virtual scavenger hunt, for a combined gross profit of \$1,355. These events replaced the usual “First Friday” parking lot sales that were put on hold due to the COVID-19 Pandemic.
- The annual raffle for a car giveaway donated by Kwik Tow for 2020 concluded in January 2021 with the drawing airing live on the AMA Facebook page. Nearly \$8,000 was raised from this event alone.
- In light of AMCF fundraising efforts being lower in 2020 than expected due to COVID-19, the AMCF Board has elected to hold off on replenishing scholarship reserves in 2021 as there is a current reserve of approximately \$102,000 – well above the \$50,000 suggested minimum. This will allow for the AMCF to award more to other beneficiaries, especially those impacted by COVID-19.
- AMCF Phoenix will kick off their 2021 campaign with a golf ball drop at the AMA Golf Tournament on March 23. Balls may be purchased before the tournament and during registration for \$10 each, \$20 for three or \$50 for ten. Purchased balls will then be numbered and placed in a bucket to be dropped over a hole from a helicopter at the end of the day. The ball that lands closest or in the hole will win \$1,000 sponsored by Kwik Tow. The ball furthest from the hole will win \$500 sponsored by American Roofing.
- Other new events for 2021 will include a “Charity Week” member competition in Q2 and a goods drive for UOMOM New Day Centers in July.
- AMCF hopes to be able to return to the annual Bowl-a-thon in November, but is exploring options for a virtual and/or rooftop wine tasting and silent auction should COVID-19 still be a concern.

- Kwik Tow has graciously agreed to donate yet another car to be raffled off in support of AMCF charities in 2021. The car will be determined later this year and announced at Tributes in August. A winner will be drawn at the AMA Holiday Party in December.
- AMA staff are actively monitoring the status of the First Friday Art Walks to determine if/when to bring back parking lot sales.
- The AMA “Text-to-Donate” campaign will be continued in 2021. Text “BIGHEARTSPHOENIX” TO 44-321.
- The Committee elected to continue raising funds for UMOM and SARRC in 2021 and have also added the Resident Relief Foundation as a beneficiary.

Save the Date – 2021 Remaining Activities

- March 23 – Golf Ball Drop
- Q2 – Charity Week
- July – UMOM Goods Drive
- August 13 – Annual Car Raffle Kick-off at Tributes
- November – Bowl-a-thon
- December – Drawing for Car Raffle at AMA Holiday Party

AMCF/Big Hearts (Tucson)

Linda Morales, Chair

Natalie Evans, Vice Chair

Total Net Funds Raised in 2020 were \$18,788.17. AMCF Big Hearts Tucson beneficiaries for 2021 have yet to be determined, but will be selected in keeping with the mission of Homelessness Intervention.

- The AMCF Tucson beneficiary being awarded this year with funds raised in 2020 is Our Family Services.
- The Annual Fun Run was held virtually from January 20 to February 20. At the time of the report there were 74 participants and 10 sponsors with fundraising anticipated to be at approximately \$3,000.
- 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.
- The El Tour de Tucson event will no longer be on April 10 and is now scheduled for November 20, 2021.
- Big Hearts Tucson will participate in the Jim Click Millions for Tucson Raffle in 2021.
- The committee is looking into finding restaurants to participate in Dine For Charity in 2021.

Save the Date - 2021 Fundraising Activities

- September 24, 2021 – Tucson Bowl-A-Thon/Silent Auction
- November 20, 2021 – El Tour de Tucson

Communications Committee

Conor McManus, Chair

2021 Upcoming Communications & Technology Committee Meetings:

- March 8, 2021
- July 12, 2021
- May 10, 2021
- September 13, 2021

Action Items from the January 11 Communications Committee Meeting:

- Positive Stories: Strategically contact members to get positive stories:
 - Co-Star monitors member reviews
 - Utilizing different social media platforms – enhance how we communicate with different channels available, repurpose positive stories from LinkedIn.
- Editorial piece – let the industry know we work together. Publish within the next 30 to 60 days. Distribute to channel mediums. Topics to submit to channel mediums and which ones they would be interested in:
 - Ideas
 - GateWay Community College – what we are doing with maintenance technician programs
 - Industry Leaders – send out email to committee members for interview questions and send to PR contact
 - Evictions/Rent - how we worked with residents to help them out
- Committee Poll
 - Vote on new name for upcoming philanthropic hub
- Get feedback and content ideas for webpages “Why Rent” and “AZ Rental Housing”

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.

Upcoming 2021 Publication Schedule

- March/April *Apartment News* will include editorial piece from industry leaders panel interview conducted by Communications Committee.

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)

Rachael Kish and Bry Carter, Co-Chairs

The focus this year is new, relevant classes for a broader group of members. We will still offer core classes including Fair Housing, Landlord Tenant and a variety of maintenance focused classes. We will also be offering classes covering financials, mastering delegation, diversity, HR topics and classes focused on Assistant Managers and Regional Managers. We will also be offering a “Train the Trainer” class to help members learn the skills to conduct their own classes.

At this time all classes are being held via Zoom, but we hope to get back to in-person classes soon!

Beginning with January classes, AMA has recorded the classes and is offering them for sale on the “OnDemand Education” page of the website.

The Education Committee meets monthly to discuss topics, class descriptions and titles and to help staff find and secure instructors for classes. See 2021 schedule below.



Class	Time	Date	Where	Cost	Instructor	Budget	Attended
Fair Housing	9am – 12pm	1/14/21	Zoom	\$30	Denise Holliday	20	28
HR: Interviewing, Onboarding and Coaching	9am - 12pm	1/21/21	Zoom	\$30	Rachael Kish & Bry Carter	20	22
Lunch & Learn: Economic Forecast	12 - 12:30 pm	1/22/21	Zoom	Free	Mark Dewane	20	30
Prop 207: Part 2	9am - 12pm	1/27/21	Zoom	\$30	Mark Zinman, Chris Walker	20	39
HVAC Training	9am- 12pm	1/28/21	Zoom	\$30	Rainforest	20	21
Move in Ready for Office Staff	9am - 12pm	2/9/21	Zoom	\$30		20	Replaced
Financials 101	10am -12pm	2/9/21	Zoom	\$30	Rachael Kish, Jackie Salinas	Added	29
Mastering Delegation and Empowering Your Team	9am - 12pm	2/10/21	Zoom	\$30	John Phelps	20	26
Latte with a Lawyer	10am - 11am	2/12/21	Zoom	Free	Blythe Edmondson & Chris Walker	20	30
CAM	9am - 4pm	2/15-19/21	Zoom	\$895	Kris Wegener	15	23
CPO	9am - 4pm	2/23-24/21	Zoom	\$250	Kyle Kik	10	Rescheduled
Lyceum Day 1	9am – 4pm	2/26/21	Zoom	\$375		20	25
EPA Section 608	9am – 4pm	3/17-17/21	Zoom	\$150	Rainforest	20	
ADA & Assistance Animals	9am – 12pm	3/18/21	Zoom	\$30	Mark Zinman	20	
Lunch & Learn: Utility Billing	12-12:30 pm	3/19/21	Zoom	Free	Kelly Gettys	20	
Legislative, Local & Courts update	10am -11am	3/30/21	Zoom	Free		Added	
Emergency Rental Assistance	2pm – 3pm	3/30/21	Zoom	Free		Added	
Latte with a Lawyer	10am – 11am	4/9/21	Zoom	Free	Denise Holliday	20	
Asst Manager - Best Practices	9am – 12pm	4/13/21	Zoom	\$30	Tracy Mendoza	20	
One Property, One Team: Maintenance & Office Staff	10am -12 pm	4/14/21	Zoom	\$30	Greystar Team	20	



Diversity: A Starting Place	9am -12pm	4/21/21	Zoom	\$30	Jess Pettitt (outside speaker)	20	
Budgeting & Reforecasting	9am -12pm	4/27/21	Zoom	\$30	Rachael Kish & Jackie Salinas	20	
Landlord Tenant	9am -12 pm	5/11/21	Zoom	\$30	Chris Walker	20	
Plumbing Maintenance & Repair	9am -12pm	5/12/21	Zoom	\$30	Home Depot	20	
Learn to Reach Super Stardom in Asset Management	9am -12pm	5/13/21	Zoom	\$30	Michelle Sinclair, Rob Hart, Sandra Giambanco	20	
Lyceum Day 2		5/21/21					
Lunch & Learn: Train the Trainer	12-12:30 pm	5/21/21	Zoom	Free	Tracey Carboun	20	
Leading in Diversity & Inclusion	9am -12pm	5/26/21	Zoom	\$30		20	
Appliance Repair	9am -12pm	6/3/21	Zoom	\$30	Home Depot	20	
HR: Creating a Culture in Your Company	9am -12pm	6/15/21	Zoom	\$30		20	
Welcome to Leasing	9am -12pm	6/22/21		\$30		20	
Fair Housing	9am -12pm	7/8/21		\$30	Mark Zinman	20	
Maintenance Customer Service Skills	9am -12pm	7/13/21		\$30		20	
Lunch & Learn: Outlook Tips & Tricks	12-12:30 pm	7/16/21		Free	Sarah Fluke	20	
Develop Your Leadership Skills	9am -12pm	7/21/21		\$30		20	
Conflict Resolution Strategies	9am -12pm	7/28/21		\$30		20	
Latte with a Lawyer	10am – 11am	8/6/21		Free	Chris Walker	20	
Human Trafficking Awareness	9am -12pm	8/17/21		\$30		20	
Electrical Troubleshooting	9am -12pm	8/26/21		\$30	Home Depot	20	
Fair Housing/Sexual Harassment for Maintenance	9am -12pm	9/9/21		\$30	Chris Walker	20	
Active Shooter De- Escalating Techniques	9am -12pm	9/22/21		\$30		20	
Leveled Up Leasing	9am -12pm	9/23/21		\$30		20	

Lunch & Learn	12-12:30 pm	9/24/21		Free		20	
CALP	9am-4pm	10/4-8/21		\$375	Kris Wegener	18	
Latte with a Lawyer	10am -11am	10/8/21		Free	Mark Zinman	20	
Domestic Violence Awareness	9am -12pm	10/12/21		\$30	Denise Holliday	20	
CPR & First Aid	9am -12 pm	10/19/21		\$70		20	
Fair Housing	9am -12 pm	11/9/21		\$30	Chris Walker	20	
Maintenance Course	9am -12pm	11/16/21		\$30	Home Depot		
Lunch & Learn	12-12:30 pm	11/16		Free		20	
Landlord Tenant	9am -12pm	12/8		\$30	Denise Holliday	20	
Make Ready Maintenance	9am -12pm	12/15		\$30	Rod Wilson	20	

Education (Tucson)

Due to COVID 19 restrictions preventing in-person classes at this time, all Tucson educational offerings are being done virtually with Phoenix Education. Please see the Phoenix Education agenda for details.

Education Conference & Trade Show (Phoenix – 2021) (Incorporated into Events Committee)

The 2021 Phoenix Education Conference & Trade Show is scheduled for Thursday, September 16, 2021 at the Phoenix Convention Center.

At the February Events Committee meeting, we began discussing the theme. This will be finalized at the March 4 meeting.

The Education Committee will begin to discuss ideas for the education sessions in March.

Education Conference & Trade Show (Tucson – 2021)

Kimberly Barrow, Chair
Matt Taylor, Vice Chair

The 2021 Tucson Education Conference & Trade Show presented by Zona Law Group is scheduled for Wednesday November 10, 2020 at the Tucson Convention Center. The committee will begin meeting in March.



Save the Date – 2021 Tucson Trade Show

- November 10, 2021 – Tucson Convention Center

Ethics Committee

Debbie Willis, Chair

No active ethics complaints at this time.

Membership

Michelle Jenson and Chris Worrell, Co-Chairs

The Membership Committee has been focusing their efforts on member retention by reaching out to new members at their six-month anniversary to answer questions and encourage them to join a committee or attend a virtual event.

The Committee continues to host virtual new member orientations through Zoom utilizing the breakout room feature to connect new members with mentors from the committee. A new member orientation is scheduled every other month starting in January 2021.

AMA membership is holding strong despite COVID-19. As of February 21, the AMA has a total of 305,120 units in membership. Associate membership has decreased from 527 to 473; however, AMA staff anticipated this decrease due to lack of in-person events and opportunities to network with regular members. A short survey will be sent to Associates who dropped in 2020 to get more detail as to why they dropped and if they plan to rejoin once live in-person events start again. The membership goal for 2021 is 315,000 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% rebate to all members who spend over \$25k annually and who have a Pro Extra account. The AMA will receive .5% of total spending for members who have a Pro Extra account. AMA is expected to receive \$12,900 in revenue from 2020 member spending. The AMA currently ranks third in the Metro 31 affiliate group for total spending in 2020.

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.

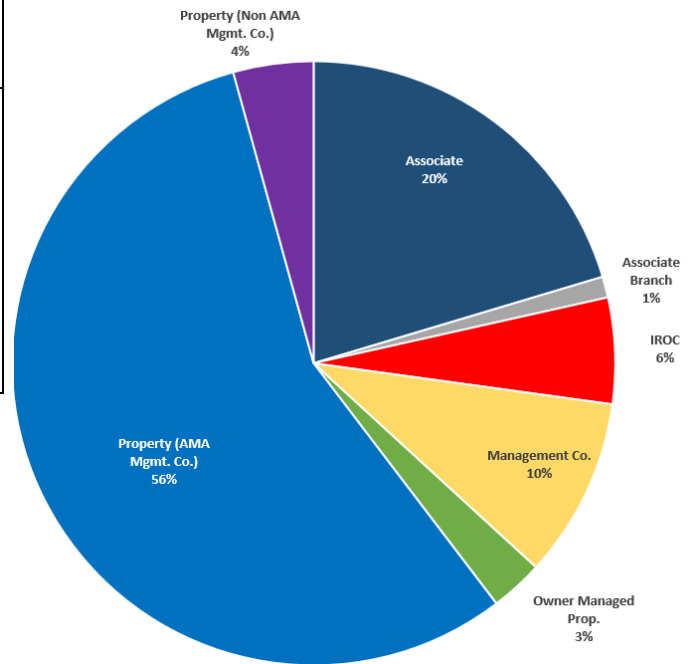
Patron Program

There are a total of 42 patrons for 2021 with two new Silver Patrons. AMA staff continues to work with interested Associates on selling the program.

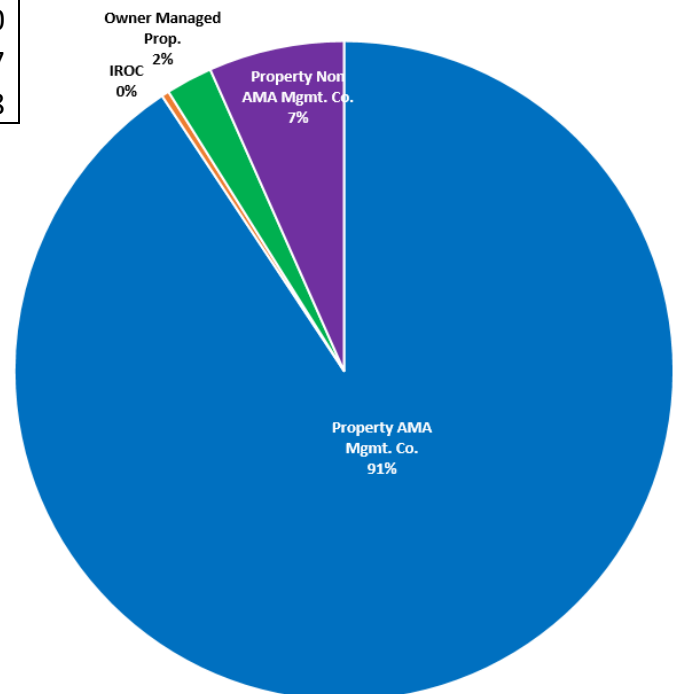
Sponsorships are available for our 2021 events and sponsorships for Phoenix and Tucson Maintenance Mania are now available. We are working with all companies to develop sponsor programs to fit any budget. Please contact Sarah Fluke or Lauren Romero for more information.

Membership as of 2/21/2021

Total AMA Members	2,326
Associate	448
Associate Branch	25
IROC	127
Management Co.	220
Owner Managed Prop.	64
Property (AMA Mgmt. Co.)	1,323
Property (Non AMA Mgmt. Co.)	96



Total Units In Membership	305,120
Property AMA Mgmt. Co.	277,955
IROC	1,150
Owner Managed Prop.	6,657
Property Non AMA Mgmt. Co.	19,358



Networking Committee (Tucson)

Elizabeth Beaulieu, Chair

Tammy Minot, Vice Chair

The first networking event of the year is a free Coffee & Comradery virtual networking event geared toward new members on February 19.

- A Spring Networking Event is still tentative, but the committee is hoping to put together a small (under 50 people) event in March for those members who would like to attend an event at this time.
- The committee is considering hosting another networking event in June that more people will be able to attend.

Save the Date – 2021 Networking

- March 11 - Small Networking Event TBD
- May 13 – Spring Dinner Meeting
- October 14 - Fall Dinner Meeting
- October 28 - Chili Cook Off

Social Responsibility Committee (Phoenix)

Christi Moutray & Daniel Vollmer, Co-Chairs

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

- The Project SAFE season for 2020 wrapped up on January 21 with a virtual awards ceremony that aired live on the AMA Facebook page.
- The 2020 season saw 106 registrations, with the following “Best of” winners:
 - Red Mountain Springs, Dunlap & MaGee – Best Community Theme
 - Park Lee Apartments, Dunlap & Magee – Best Flyer
 - San Palmas, Mark Taylor – Best Community Participation
 - Golden Sands, Dunlap & MaGee – Best Community Turnout
 - Aeroterra I, II & III, Dunlap & MaGee – Shirley Arthur Committee’s Choice
- Winners received an award and lunch provided by Associate Social Responsibility committee members.
- All who completed and submitted a project received a completion certificate. There were 35 completed projects between Dunlap & Magee, Greystar, Mark-Taylor, MEB Management and Weidner.
- Project SAFE 2021 will launch in March and run through August 31. The committee will hold a virtual orientation/workshop in March for new participants or those who are in need of a refresher.
- Phoenix & Tucson AMA staff are working on streamlining and converting all registration and submission forms to electronic going into the 2021 season.

Additional Social Responsibility Initiatives

- The committee plans to revive AMA’s “Community Coalitions” and “Crime-free Multi-housing” programming in 2021. Planning will begin in Q2 with re-launch slated for beginning of Q4.

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. Workshop is scheduled virtually for February 23. Attendees will receive an overview of Project S.A.F.E., the benefits for their communities and how to make the program successful, as well as information on holding a virtual or hybrid event. Following the overview, attendees will break into groups in Zoom breakout rooms to brainstorm with committee members regarding their events and discuss best-practice tips. The goal for 2021 is 100 participating properties. In keeping with AMA branding, the “Manager Survey” and “Best Of” contest submission forms will all be online, along with the event registration.