

**COMMON INTEREST COMMUNITY BOARD  
TRAINING PROGRAM REVIEW COMMITTEE MEETING**

**MINUTES OF MEETING**

The Training Program Review Committee of the Common Interest Community Board met on Wednesday, June 2, 2010, at the Department of Professional and Occupational Regulation (DPOR), 9960 Mayland Drive, 2<sup>nd</sup> Floor, Board Room 4, Richmond, Virginia 23233.

The following members were present:

Douglas Kleine, Chair  
Scott Sterling  
Pamela Coerse  
F. James Ahlberg  
Lucia Anna Trigiani (Ex-Officio)

Committee member Ronda S. DeSplinter was not in attendance.

DPOR staff present for all or part of the meeting included:

Gordon Dixon, Director  
Trisha L. Henshaw, Executive Director  
Thomas K. Perry, Property Registration Administrator  
Jesstina Adelman, Program Analyst  
Betty C. Jones, Administrative Assistant

Steven Jack from the Office of the Attorney General was not present.

Mr. Kleine, Chair, called the meeting to order at 1:09 p.m.

**Call to Order**

Ms. Coerse moved to approve the agenda. Mr. Ahlberg seconded the motion which was unanimously approved by: Kleine, Sterling, Coerse, and Ahlberg.

**Approval of Agenda**

Mr. Kleine opened the floor for public comment. No members of the public present requested to speak.

**Public Comment  
Period**

Mr. Perry provided the Committee members with a brief overview of the training program review process. He proceeded to give a brief overview of the three applications submitted for approval. Mr. Perry reminded the Committee that this Committee and the Board will be establishing precedence in reviewing future applications, and in recommending approval or denial of training program applications to the Board.

**Staff Overview of  
Approval Process**

Ms. Trigiani arrived at 2:00 p.m. Since she is an instructor for Community Associations Institute, she recused herself during the review of both CAI's applications.

**Ms. Trigiani**  
**Recused**

Mr. Kleine indicated he serves as an exam proctor for Community Associations Institute, but felt he could be fair and provide impartial judgment in reviewing Community Associations Institute's applications as he is not involved in grading or reviewing any exam content.

The Committee reviewed the application from Community Associations Institute (CAI), M-100: The Essentials of Community Association Management, for approval as an Introductory Training Program.

**Review of**  
**Introductory**  
**Training Program**  
**CAI: M-100**

Jacob Gold and Dave Jennings were present as representatives of CAI to address concerns and answer any questions from the Committee. They informed the Committee that all "manager" instructors have completed and passed the examination for the M-100 training program. Their instructors are required to have teaching experience and have a wide diversity of practical experience. In answering questions regarding the examination, Mr. Gold indicated that multiple versions of the examination were utilized.

The Committee requested that Mr. Gold and Mr. Jennings provide statistics regarding the number of individuals who have completed the M-100 program, but have not obtained the Certified Manager of Community Associations designation.

Upon thorough review of the application, Ms. Coerse moved that the Committee recommend Board approval of the M-100 as an Introductory Training Program as submitted with a retroactive approval date of January 1, 2003. Mr. Ahlberg seconded the motion which was unanimously approved by: Kleine, Sterling, Coerse, and Ahlberg. Ms. Trigiani was not present during the discussion.

The Committee reviewed the application from the Institute of Real Estate Management (IREM), Common Interest Developments: Managing Condominium Association Properties (CID 201), for approval as an Introductory Training Program.

**Review of**  
**Introductory**  
**Training Program**  
**IREM: CID 201**

Vera McPherson was present as a representative of IREM to address concerns and answer any questions from the Committee. She informed the Committee that IREM attempts to utilize local instructors, and that all instructors are required to complete and pass the examination of any

course they are teaching.

Upon thorough review of the application, Mr. Sterling moved that the Committee recommend Board approval of the CID 201 as an Introductory Training Program as submitted with a retroactive approval date of January 1, 2007. Ms. Coerse seconded the motion which was unanimously approved by: Kleine, Sterling, Coerse, and Ahlberg.

The Committee reviewed the application from Community Associations Institute, PCAM Coursework, for approval as a Comprehensive Training Program.

**Review of  
Comprehensive  
Training Program  
CAI: PCAM  
Coursework**

The Committee requested that Mr. Gold and Mr. Jennings provide statistics regarding the number of individuals who have completed the PCAM coursework, but have not obtained the PCAM designation.

Upon thorough review of the application, Ms. Coerse moved that the Committee recommend Board approval of the PCAM Coursework as a Comprehensive Training Program as submitted with a retroactive approval date of January 1, 2000. Mr. Sterling seconded the motion which was unanimously approved by: Kleine, Sterling, Coerse, and Ahlberg. Ms. Trigiani was not present during the discussion.

As a result of reviewing these three applications, the Committee recommends that the Board consider regulatory changes which:

**Concerns and  
Recommendations**

- Incorporate time allocations for each subject area.
- Include environmental issues as an additional subject area.
- Require instructors to be familiar with Virginia laws and regulations related to common interest community management.
- Require a state-specific training component as an entry requirement for certification that would cover Virginia statutes related to common interest communities as well as the Board's regulations.

Mr. Kleine thanked the Committee members for their work in reviewing these three applications.

**June 3, 2010 Board  
Meeting**

Ms. Henshaw said that the Committee's recommendations will be presented at the June 3, 2010 Board meeting. The next Committee meeting will be held on Monday, September 27 at 1:00 p.m. if any further applications are received.

The Committee members were reminded to complete their conflict of

**Conflict of Interest**

interest forms and travel vouchers.

**and Travel Voucher  
Forms**

There being no further business, the meeting was adjourned at 3:07 p.m. **Adjourn**

  
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Lucia Anna Trigiani, Chair

  
\_\_\_\_\_  
Gordon Dixon, Secretary

**STATE AND LOCAL GOVERNMENT  
CONFLICT OF INTERESTS ACT**

**TRANSACTIONAL DISCLOSURE STATEMENT  
for Officers and Employees of State Government**

1. Name: F. James Ahlberg
2. Title: Board Member
3. Agency: Common Interest Community Board
4. Meeting/IFF Date: Training Program Review Committee Meeting  
June 2, 2010

5. I have a personal interest in the following transaction:

\_\_\_\_\_

\_\_\_\_\_

Nature of Personal Interest Affected by Transaction:

\_\_\_\_\_

\_\_\_\_\_

I declare that I am a member of the following business, profession, occupation  
or group, the members of which are affected by the transaction:

\_\_\_\_\_

I am able to participate in this transaction fairly, objectively, and in the  
public interest.

or

I did not participate in the transaction.

6.  I do not have a personal interest in any transactions taken at this meeting.

F. J. Ahlberg  
Signature

6/2/2010  
Date

**STATE AND LOCAL GOVERNMENT  
CONFLICT OF INTERESTS ACT**

**TRANSACTIONAL DISCLOSURE STATEMENT  
for Officers and Employees of State Government**

1. Name: Pamela Coerse  
2. Title: Board Member  
3. Agency: Common Interest Community Board  
4. Meeting/IFF Date: Training Program Review Committee Meeting  
June 2, 2010

5. I have a personal interest in the following transaction:

N/A

Nature of Personal Interest Affected by Transaction:

N/A

I declare that I am a member of the following business, profession, occupation or group, the members of which are affected by the transaction:

I am able to participate in this transaction fairly, objectively, and in the public interest.

or

I did not participate in the transaction.

6.  I do not have a personal interest in any transactions taken at this meeting.

Pamela S. Coerse  
Signature

6/2/10  
Date

**STATE AND LOCAL GOVERNMENT  
CONFLICT OF INTERESTS ACT**

**TRANSACTIONAL DISCLOSURE STATEMENT  
for Officers and Employees of State Government**

1. Name: Douglas M. Kleine  
2. Title: Board Member  
3. Agency: Common Interest Community Board  
4. Meeting/IFF Date: Training Program Review Committee Meeting  
June 2, 2010

5. I have a personal interest in the following transaction: *CAS course - m-100*
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**Nature of Personal Interest Affected by Transaction:**

*As a volunteer, I administer the M-100 exam upon request from a student. This function has no role other than proctoring.*

I declare that I am a member of the following business, profession, occupation or group, the members of which are affected by the transaction:

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I am able to participate in this transaction fairly, objectively, and in the public interest.

or

I did not participate in the transaction.

6.  I do not have a personal interest in any transactions taken at this meeting.

  
Signature

*6/2/2010*  
Date

**STATE AND LOCAL GOVERNMENT  
CONFLICT OF INTERESTS ACT**

**TRANSACTIONAL DISCLOSURE STATEMENT  
for Officers and Employees of State Government**

1. Name: Scott E. Sterling
2. Title: Board Member
3. Agency: Common Interest Community Board
4. Meeting/IFF Date: Training Program Review Committee Meeting  
June 2, 2010

5. I have a personal interest in the following transaction:

\_\_\_\_\_

\_\_\_\_\_

Nature of Personal Interest Affected by Transaction:

\_\_\_\_\_

\_\_\_\_\_

I declare that I am a member of the following business, profession, occupation or group, the members of which are affected by the transaction:

\_\_\_\_\_

I am able to participate in this transaction fairly, objectively, and in the public interest.

or

I did not participate in the transaction.

6.  I do not have a personal interest in any transactions taken at this meeting.

Scott E. Sterling.  
Signature

2 June 2010.  
Date



**STATE AND LOCAL GOVERNMENT  
CONFLICT OF INTERESTS ACT**

**TRANSACTIONAL DISCLOSURE STATEMENT  
for Officers and Employees of State Government**

1. Name: Lucia Anna Trigiani  
2. Title: Board Member  
3. Agency: Common Interest Community Board  
4. Meeting/IFF Date: Training Program Review Committee Meeting  
June 2, 2010

5. I have a personal interest in the following transaction:

IV. a) and IV b

Nature of Personal Interest Affected by Transaction:

I serve as a faculty member of the M-204 course  
offered by Community Association Institute.

I declare that I am a member of the following business, profession, occupation  
or group, the members of which are affected by the transaction:

I am able to participate in this transaction fairly, objectively, and in the  
public interest.

or

I did not participate in the transaction.

6.  I do not have a personal interest in any transactions taken at this meeting.

Lucia Anna Trigiani  
Signature

June 2, 2010  
Date