

CERTIFIED MANAGER OF COMMUNITY ASSOCIATIONS®

# CMCA®

## HANDBOOK

SETTING THE STANDARD FOR COMMUNITY  
ASSOCIATION MANAGERS NATIONWIDE.

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## NBC-CAM

National Board of Certification  
for Community Association Managers

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CMCA® is a registered trademark  
of NBC-CAM.

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Dear CMCA Candidate:

Welcome to the Certified Manager of Community Associations® (CMCA) certification program.

The National Board of Certification for Community Association Managers (NBC-CAM) was incorporated in 1995 as an independent, affiliated organization by Community Associations Institute (CAI) to develop and administer the national CMCA certification program.

This nationally recognized program is the culmination of a lot of hard work by over 1,000 community managers, homeowners, and other experienced industry practitioners who participated in the development of the CMCA program. In order to ensure the CMCA examination remains a valid measure of a community association manager's proficiency, NBC-CAM has teamed this group's knowledge and experience with the exam development and testing expertise of the Human Resources Research Organization (HumRRO). HumRRO continually analyzes the performance, guides the development, and assists in the administration of the examinations.

This Handbook has been developed to provide you with comprehensive information about the CMCA certification and exam. NBC-CAM recognizes the commitment you are about to make and we want your experience to be a positive and successful one. If, after reading this Handbook, there is anything you do not fully understand, please call NBC-CAM at 703.836.6902, or email us at [info@nbccam.org](mailto:info@nbccam.org).

Thank you for your interest and good luck!

Very truly yours,

A handwritten signature in black ink that reads "DMBauman". The signature is written in a cursive style with a long horizontal line extending to the right.

Dawn M. Bauman, CAE  
Executive Director



# APPLICATION PROCESS AT-A-GLANCE

- Be a community association manager or be active in the community association industry.
- Complete and pass a prerequisite course on community association management.
- If you have at least five years experience as a community association manager, you may qualify for a one-time waiver of the prerequisite course.
- Complete all aspects of the CMCA application form and pay the scheduled fees.
- Pass the CMCA Examination.
- Agree to adhere to the Standards of Professional Conduct established and amended by NBC-CAM.
- Demonstrate, every two years, a commitment to a continuing education program consistent with NBC-CAM requirements through the recertification process.

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Upon successful completion of the above requirements, a candidate will become a Certified Manager of Community Associations. To remain a CMCA certificant in good standing, a candidate must meet NBC-CAM's continuing education requirements and pay the accompanying fees.



## SECTION 1:

# OVERVIEW OF THE CMCA PROGRAM

The National Board of Certification for Community Associations Managers (NBC-CAM) is an independent not-for-profit organization formed to establish and administer a nationwide program for certification for community association managers. The certification program sets standards for measuring the knowledge and proficiency required for community management. A professional Certified Manager of Community Associations (CMCA) certificant has achieved the standards identified and adopted by NBC-CAM. By earning the CMCA, the individual demonstrates to members of the profession, the public, association clients, and government authorities a commitment to and interest in providing a high level of quality community association management. A manager who holds a CMCA certification has demonstrated the knowledge necessary to perform fundamental community association management functions.

NBC-CAM was incorporated by Community Associations Institute (CAI) in October 1995 as an independent, affiliated organization to administer the CMCA certification program. The NBC-CAM Board of Commissioners (the Board) has full authority over all aspects of the certification program, which was created for the benefit of the community association management profession and the communities and homeowners they serve. More than 1,000 managers, homeowners, and industry professionals were involved in the program's development. The Human Resources Research Organization (HumRRO), a professional test development firm established in 1951, was contracted to manage the development process, which involved the identification of eleven main knowledge areas.

## **STANDARDS AND CERTIFICATION: IMPORTANT TO THE INDUSTRY**

Recognized and accepted minimum standards of fundamental knowledge for practice in community association management offer potential value and benefit to a variety of industry constituencies, including homeowners, community associations, community association managers, potential managers, association management companies, and government agencies.

The CMCA credential provides for community association homeowners

and board of directors an assurance that the manager has the basic knowledge necessary to effectively manage a community association. The association can have confidence in the knowledge and the ability of the manager, knowing the manager has taken the initiative to complete the stringent requirements for certification. The CMCA also offers the association a baseline against which to evaluate manager candidates. Board of directors can use the knowledge and skills required for the CMCA as minimum criteria for a manager or management company. The credential can help the associations to “weed out” candidates who don’t have the necessary knowledge or skills to do the job.

To the profession, the association client, the public, and government authorities, the CMCA credential provides evidence that the certificant achieving this certification has demonstrated adequate understanding of the fundamental body of knowledge of a community association manager, is committed to continuing education to maintain and enhance that knowledge, and will maintain the CMCA Standards of Professional Conduct that are part of the certification program.

## MISSION

The mission of the certification program is to advance and help assure the quality of professional community association management. The goals of the program are:

- To enhance the professional practice of community association management
- To identify the body of knowledge necessary in that professional practice
- To recognize those individuals who have demonstrated a satisfactory understanding of that body of knowledge

The certification program is based upon the strong belief that there is a fundamental body of knowledge that should be possessed by an individual who is responsible for the management of one or more community associations.

## EARN YOUR CMCA CMCA QUALIFICATIONS

To qualify to become a CMCA certificant, a

manager must:

- Be a community association manager or be active in the community association industry.
- Complete and pass a prerequisite course on community association management or qualify for a waiver if you have at least five years experience as a community association manager.
- Complete all aspects of the CMCA application form and pay the scheduled fees.
- Pass the CMCA Examination.
- Agree to adhere to the Standards of Professional Conduct established and amended by NBC-CAM.

## APPLICATION PROCESS

Candidates wishing to sit for the CMCA Examination may request an application form or obtain further information from NBC-CAM. Candidate applications must be submitted with the appropriate documentation and fees to NBC-CAM. The next section, Taking the CMCA Examination, provides you with information about the application process, dates for the examination offerings, and application deadlines.

## SECTION 2:

# TAKING THE CMCA EXAMINATION

### EXAMINATION FORMATS

There are two convenient ways to take the CMCA Examination—computer-based or pencil and paper.

#### COMPUTER-BASED EXAMINATION

Once the board determines you are eligible to take the examination and notifies LaserGrade, an Authorization to Test (ATT) will be mailed to you. The ATT includes the dates you will be eligible to take the examination as well as your test authorization number and an expiration date. Your application will have been approved for the next two computer-based testing cycles from the date of your letter. You may take the exam any day and time in the month of the two testing cycles. If you do not take your examination within the two cycles, your testing fee and application will be forfeited.

You must have your ATT before you schedule an appointment to take the examination. If you lose your ATT, contact NBC-CAM at 703.836.6902 or fax a notice to 703.684.1581. Offices are open Monday through Friday, from 9 a.m. to 6:30 p.m. Eastern Standard Time.

The computer-based exam offers more exam dates and locations and gives instant test results to candidates. It is administered by LaserGrade Computer Testing, Inc., an international computer-based testing company with proctored testing centers worldwide.

To take the CMCA Examination via computer, please sign up for the exam by checking CBT on the CMCA application. Minimal computer experience is required. When you are ready to take the exam, test officials will put you at ease with step-by-step instructions.

Immediately after you complete the exam, LaserGrade will score your test and you will be given instant results.

#### SCHEDULING YOUR EXAMINATION FOR COMPUTER BASED TESTING (CBT)

Your ATT will indicate the time frame within which you may schedule your appointment. Once you receive your ATT, you may schedule an appointment to test at any time during your eligible time period in the months of January/February,

April/May, July/August, or October/November. Appointments are made on a first-come, first-serve basis.

You should schedule your appointment as soon as you receive your ATT. Even if you do not want to test immediately, it is better to schedule early. Waiting to schedule your testing appointment may significantly limit the dates the center has available to seat you. If you wait to schedule your appointment until your ATT is close to expiring, an appointment may not be available prior to the expiration date. If this occurs, you will forfeit your testing fee.

You cannot make a testing appointment until you receive your ATT. Make sure you have your ATT available when you make your call. You may schedule an appointment with LaserGrade Centers by calling registrations at 800.211.2754. To find one of the 1,000 locations nearest you, visit [www.lasergrade.com](http://www.lasergrade.com) and enter your zip code.

#### WHAT TO TAKE TO THE TESTING CENTER

- You must have proper identification to be admitted to the test administration room.
- You may not take books, papers, or other reference materials into the test administration room.
- No food or beverages may be taken into the test administration room.
- Listen to the test administrator carefully. Ask all questions before the exam begins.
- Visitors are not allowed in the test administration room.

#### COMPUTER TECHNICAL DIFFICULTIES—LASERGRADE

On very rare occasions, technical difficulties may be encountered at the testing center. If you experience technical difficulties, notify the testing center administration immediately. Every effort will be made to correct the problem as quickly as possible.

In the case of severe technical difficulties or power loss, candidates may be unable to continue their testing session. In such instances, reasonable accommodations will be made, including rescheduling

of the testing appointment. Requests will be evaluated by NBC-CAM on an individual basis.

#### EXAMINATION AND RESULTS

The test center administrator will give you a brief orientation/overview on the workstation. The examination software includes a calculator, a timer, and a question counter. You will also have the ability to skip questions and return at a later time. When you have finished with your examination, the test administrator will release your grade to you. Candidates who successfully complete the examination will receive confirmation and the CMCA certificate within four to six weeks via mail.

#### FEES FOR THE COMPUTER-BASED EXAMINATION

The cost of the computer-based exam is \$300 (standard fee of \$250 plus a \$50 electronic service fee) which covers the application fee, exam, your first year of certification, and issues of *Upward Directions*, the CMCA e-newsletter.

If a candidate does not pass the exam they are given the opportunity to re-take the exam as early as the next exam date. Candidates must complete and submit the Retest Application and submit the examination fee. The fee is \$250 for a LaserGrade computer-based exam retest.\*

#### PENCIL AND PAPER EXAMINATION

You may choose to take the exam via the standard pencil/paper format at one of the pre-determined locations. To take the CMCA Examination via pencil/paper, please sign up for the exam by selecting paper/pencil on the CMCA application. Candidates will receive pencil/paper test results within four to six weeks after taking the exam. Results include a feedback sheet showing the approximate percentage of items answered correctly.

#### FEES FOR PENCIL AND PAPER

Complete and submit the application. The examination fee is \$250 and is nonrefundable. Candidates who need to retake the exam must resubmit a Retest Application and a \$200 retake fee. There is no limit on the number of times a candidate may take the examination.\*

\*Retake application is valid for five years.

## EXAMINATION DATES AND APPLICATION DEADLINES

### [COMPUTER-BASED FORMAT]

The computer-based examination is offered in two-month cycles four times a year—during **January/February, April/May, July/August and October/November**. Please visit [www.lasergrade.com](http://www.lasergrade.com) for specific locations —Sponsoring Organization: National Board of Certification for Community Association Managers.

| EXAM DATE               | APPLICATION DEADLINE |
|-------------------------|----------------------|
| January 1 - February 28 | January 15           |
| April 1 - May 30        | April 15             |
| July 1 - August 31      | July 15              |
| October 1 - November 30 | October 15           |

### [PENCIL AND PAPER FORMAT]

The pencil/paper examination is offered three times a year—once during **March, April and September** in approximately 40 major U.S. cities. Some locations may not be available for all examinations and NBC-CAM reserves the right to cancel a location due to low enrollment.

| EXAM DATE         | APPLICATION DEADLINE                       |
|-------------------|--|
| March 5, 2010     | February 1, 2010                           |
| April 28, 2010    | April 1, 2010 (Held only in Las Vegas, NV) |
| September 5, 2010 | August 1, 2010                             |
| March 4, 2011     | February 1, 2009                           |
| TBD               | April 1, 2009 (TBD)                        |
| September 9, 2011 | August 1, 2009                             |

## PENCIL/PAPER EXAM LOCATIONS

|  |  |  |
|--|--|--|
| <b>ARIZONA</b><br>Phoenix<br>Tucson                            | <b>ILLINOIS</b><br>Roselle<br>Chicago                    | <b>OHIO</b><br>Cincinnati (metro area)<br>Columbus                 |
| <b>CALIFORNIA</b><br>Los Angeles<br>San Diego<br>San Francisco | <b>MARYLAND</b><br>Baltimore                             | <b>OREGON</b><br>Portland  |
| <b>COLORADO</b><br>Denver<br>Colorado Springs                  | <b>MASSACHUSETTS</b><br>Boston (metro area)<br>Wellesley | <b>PENNSYLVANIA</b><br>Blue Bell<br>East Philadelphia (metro area) |
| <b>CONNECTICUT</b><br>Hartford                                 | <b>MICHIGAN</b><br>Ann Arbor<br>Detroit (metro area)     | <b>TENNESSEE</b><br>Nashville                                      |
| <b>DISTRICT OF COLUMBIA</b><br>(metro area)                    | <b>MISSOURI</b><br>St. Louis<br>Kansas City              | <b>TEXAS</b><br>Austin<br>Dallas<br>Houston                        |
| <b>FLORIDA</b><br>Ft. Myers<br>Miami<br>Orlando                | <b>NEVADA</b><br>Las Vegas<br>Reno                       | <b>VIRGINIA</b><br>Falls Church<br>Virginia Beach<br>Glen Allen    |
| <b>GEORGIA</b><br>Atlanta                                      | <b>NEW JERSEY</b><br>Princeton                           | <b>WASHINGTON</b><br>Kirkland                                      |
| <b>HAWAII</b><br>Honolulu                                      | <b>NORTH CAROLINA</b><br>Raleigh<br>Pineville            | <b>WISCONSIN</b><br>Milwaukee                                      |

### CONFIRMATION APPROVAL [PENCIL AND PAPER EXAMINATION]

Once the board determines you are eligible to take the CMCA Examination, a confirmation letter of approval will be mailed to you within four to six weeks of your submitted application. Contact the listed proctor on your confirmation letter to confirm testing location and time.

If you fail to confirm with your proctor the time and location of your examination, and you miss the appointment, your application/testing fees will be forfeited.

### EXAMINATION RESULTS [PENCIL AND PAPER EXAMINATION]

Candidates will receive their examination results within four to six weeks of taking the examination. No examination results are given out over the telephone, emailed, or faxed. Results include a candidate feedback sheet that will show the approximate percentage of items answered correctly. **Numeric test grades are not given out. Only pass/fail information is provided.**

### EXAM SCORING

The CMCA Examinations are criterion-referenced examinations; i.e., the passing score is set beforehand, and candidate performance on the examination is not compared to the performance of others taking the examination. In a criterion-referenced examination, a candidate must obtain a score equal to or higher than the “passing score” to pass the test. The passing scores represent absolute standards and are determined by NBC-CAM content experts using psychometrically accepted standard-setting methodology.

### SCORE REPORTING

The pencil and paper examinations are electronically scored by the Human Resources Research Organization (HumRRO). For this reason, it is important to complete the answer sheet according to the instructions provided by the Test Administrator or Proctor on the day of the exam. Candidates will receive credit only for answers recorded on the scanable answer sheet. Answers marked in the test booklet(s) will NOT be counted toward a candidate’s score. All

candidates will receive a score report of their performance. Examination results are mailed to candidates approximately four to six weeks after the examination administration. In reporting the examination results to candidates, statistical procedures are used to convert raw scores (i.e., the number of test questions answered correctly) to scaled scores which are equivalent for all administrations of the examination(s). The scaled score is not a “number answered correctly” score. Candidate scores cannot be given via telephone, email, or fax.

### HAND SCORE REQUESTS

Candidates who fail the CMCA Examination may appeal their results by sending a written request to have their exam hand-scored within thirty days. The results of the hand-scoring will be sent to the candidate within thirty days of receipt of the request. There is no charge for hand-scoring. Requests should be submitted to NBC-CAM via email, fax, or U.S. mail.

### CONFIDENTIALITY POLICY

NBC-CAM will not release any information regarding a candidate’s examination application and a candidate’s examination administration to any employer, regulatory agency, or any other person or entity unless they inquire in writing to the Commission. The name and certification status of individuals who have successfully completed the CMCA Examination may be published and released upon request to employers and other interested parties. NBC-CAM and HumRRO will discuss score-related matters with the candidate or the candidate’s legal representative only.

### RECORD RETENTION POLICY

NBC-CAM will compile and file records for each CMCA applicant and certificant and will retain the applications as follows:

- New application will be stored permanently in an electronic manner.
- Recertification and reinstatement applications will be stored for four years and will be destroyed after four years.

## **REFUNDS AND WITHDRAWALS**

The exam fees are nonrefundable. There is no limit on the number of times a candidate may take the exam.

Carefully select your testing date and location. If you wish to change your testing date or location or withdraw from the examination within two weeks of the test date, a \$50 administrative penalty fee will be applied. A written notification must be received for any request for refunds, rescheduling, or withdrawals.

LaserGrade: If you need to reschedule your computer based testing (CBT) appointment, you must contact your LaserGrade testing center no later than noon, Eastern Standard Time, of the third business day prior to your scheduled appointment. Leaving a message on an answering machine is not an acceptable method of canceling or rescheduling your appointment.

If you fail to arrive for your appointment or cancel without giving the required notice, you will forfeit your testing fee.

## **IDENTIFICATION REQUIREMENTS**

The identification (ID) requirements to be admitted to your proctor or testing center consist of a primary form of ID that contains both your signature and a recent photograph of you. The printed name on your ID must be the same as the name that appears on your registration form.

Acceptable forms of primary identification are (photo and signature mandatory): valid driver's license with photo and valid state/province ID card with photo. Without proper identification, you will not be admitted to take the examination. There will be no refund of your testing fee.

## **SECURITY MEASURES**

Numerous security measures will be enforced during the test administration to ensure the integrity of the program. Be aware that you will be observed at all

times while taking the examination. This observation may include direct observation by test proctors or testing center staff.

Examinations cannot be viewed, copied, or studied by any individuals. Copying or retaining test questions or transmitting the test questions in any form to other individuals, organizations, or study groups will result in forfeiting your right to have your examination graded and may result in disciplinary action by the board.

## **REQUESTING SPECIAL TESTING ACCOMMODATIONS**

NBC-CAM abides by all applicable federal and state statutes relating to the accommodation of disabled individuals. All requests for special accommodations must be submitted in writing along with the submission of the application. Testing accommodations for candidates with disabilities will be made only with the authorization of the board.

Candidates who have requested special testing accommodations from the board should not schedule an appointment to take the examination until receiving written confirmation of the accommodations.

## **IF THE TEST SITE IS CLOSED**

If you are unsure whether a test site is closed because of inclement weather or some other factor, you should contact the testing center or proctor directly. If the site is open, it is your responsibility to keep the appointment. If the site is closed, you will be given the opportunity to reschedule the appointment at no additional cost.

## **DRESS APPROPRIATELY**

Every effort will be made to ensure that the test administration room is neither too warm nor too cool. However, sometimes problems with heating and cooling do occur. Be prepared.



## SECTION 3:

# CMCA EXAMINATION

## [CONTENT AND STUDY MATERIALS]

### OVERVIEW OF THE PROCESS OF DEVELOPING THE EXAM

The CMCA Exam is a nationally developed standardized examination which has been validated by a recognized professional testing firm, approved by the NBC-CAM Board, and administered by an independent, recognized testing agency (HumRRO).

It is a three-hour multiple choice exam consisting of 120 questions and is offered in paper and pencil format three times a year in major cities around the country and via computer during the months of January/February, April/May, July/August, and October/November at over 1,000 test sites.

Applicants should review the Exam Study Guide to help them develop strategies for exam preparation, identify major content areas, and review sample questions.

NBC-CAM adheres to a process of test development that helps to demonstrate that an examination is “content valid.” Content validity is a critical characteristic that helps to assure the effectiveness of a test, as well as its legal defensibility. It is a process that helps assure that a test measures what it is supposed to measure and excludes material that is irrelevant or trivial.

The contents of the examination are based on a study of related job requirements. In 2006, NBC-CAM completed an update to the 1995 occupational analysis. The occupational analysis study identified 114 relevant tasks organized into seven categories: Association Administration, Community Governance, Financial Management, Risk Management and Insurance, Facilities Management, Human Resource Management, and Communications Management. It also identified 72 knowledges that are required for successful performance of the tasks. These knowledges were organized into eight content areas.

In addition to the 100 scored test items, each CMCA Examination includes 20 items that are included on an experimental basis. These “pilot test” items are new or substantially revised items that we want to test before incorporating them on new versions of the test as operational (i.e., scored) items.

## CONTENT OF THE CMCA EXAMINATION

The CMCA Examination is a three-hour, 120 question multiple-choice exam. The exam is divided in approximately the following manner:

- Meetings (11%)
- Governance and Legal Issues (22%)
- Budgets, Reserves, Investments, and Assessments (15%)
- Financial Controls (12%)
- Risk Management and Insurance (10%)
- Property Maintenance (8%)
- Contracting (14%)
- Human Resources Management (8%)

## STUDY MATERIALS

The main study material should be the manual from the prerequisite course. You should review each chapter carefully, paying close attention to subjects heavily tested on the course exam. In addition, it is suggested that you review CAI's Guide for Association Practitioners (GAP) series (specifically *Drafting Rules, Bids & Contracts, Meetings & Elections, Reserve Funds, Risk Management and Insurance.*)

For information on purchasing CAI's GAP series, please contact CAI Direct at 888.224.4321 or 703.548.8600 or visit [www.caionline.org/bookstore.cfm](http://www.caionline.org/bookstore.cfm).

The following is a detailed breakdown of subjects covered on the exam and the knowledge required for each subject. Also included is a list of tasks that community association managers perform in order to gain knowledge in the particular subject area.

### MEETINGS (11% OF TOTAL QUESTIONS)

Topics Covered:

- Differences in the roles of managers and directors at a board meeting
- Requirements (e.g., agendas, notification, quorum, voting procedures) for different types of meetings
- Requirements for election procedures and the functions of nominating committees

- Basic principles of parliamentary procedure (e.g., Robert's Rules of Order) and governing documents
- Form and content of meeting minutes
- Roles and responsibilities of community association committees
- Procedures for holding an executive session
- State laws regarding association meetings

Tasks associated with this knowledge area:

- Develop and implement an administrative calendar of association meetings, events, and activities
- Serve as a liaison between the association/board of directors and legal counsel
- Provide information and guidance to the board as it sets policies and makes decisions
- Prepare and submit a management report to the board
- Prepare agendas and information packets for board meetings
- Educate and advise the board of its role and responsibilities
- Prepare and distribute meeting notices
- Develop and implement election procedures for membership meetings in accordance with governing documents
- Organize and participate in meetings of the membership and the board
- Maintain minutes and resolutions

### GOVERNANCE AND LEGAL ISSUES (22% OF TOTAL)

Topics Covered:

- Laws and documents that govern a community association
- Roles and responsibilities of the board of directors
- Roles and responsibilities of a community association manager
- Rights and responsibilities of members

- Due process to enforce rules and architectural guidelines
- Criteria for developing a valid and enforceable rule and guideline
- Fiduciary responsibilities
- Hierarchy of authority among governing documents
- Hierarchy of authority among federal, state, and local ordinances
- Laws and governing documents that establish requirements for board of directors meetings
- Need for written policies and procedures for a community association, including operations, emergency, and disaster programs
- Use restrictions in association documents
- Internal and external resources for enforcing rules and architectural guidelines (e.g., fees, suspension of voting rights, police, local government agencies, alternative dispute resolution, litigation)
- Reporting requirements for associations
- Legal requirements for disclosures on sales

Tasks associated with this knowledge area:

- Organize and maintain association files (e.g., contracts, and correspondence)
- Respond to resident/owner inquiries
- Prepare packets for sales, leases, or transfers required by association documents or statutes
- Serve as a liaison between the association/board of directors and legal counsel
- Provide information and guidance to the board as it sets policies and makes decisions
- Educate and advise the board of its role and responsibilities
- Prepare and distribute meeting notices
- Develop and implement election procedures for membership meetings in accordance with governing documents

- Ensure compliance with local ordinances prior to commencement of contracted work
- Advise the board in developing rules and regulations
- Develop due process procedures for board approval
- Process architectural variance or change requests
- Identify and record violations of association restrictions, rules, and regulations
- Implement enforcement policies (e.g., rules and architectural controls) as directed by the board
- Distribute the budget as required by the governing documents and statutes
- Develop and implement effective assessment collection and accounts receivable processes
- Prepare and send assessment notices and late payment notices
- Apply late charge, interest, fines, and legal fees on delinquent accounts as directed by governing documents or board policy
- Communicate delinquency information to legal counsel
- Maintain in force insurance coverages (e.g., casualty, fidelity, liability, and property) in accordance with governing documents, statutes, and board policy
- Serve as liaison between the board and the community association members
- Represent the community association to the outside community (e.g., interface with local government, media, and local public agencies)
- Develop, maintain, and distribute specific community information (e.g., list of service responsibilities)
- Prepare and/or provide courtesy informational packets about the community association providers, physical amenities, operation hours, owner vs. association to prospective buyers, owners, and tenants (e.g., familiarization packets)

## **BUDGETS, RESERVES, INVESTMENTS, AND ASSESSMENTS (15% OF TOTAL)**

Topics Covered:

- How to prepare and use an annual budget
- Laws and governing documents that establish budget requirements

- Fundamental requirements for reporting and disclosure statements as required by law
- Board of directors', officers', committees', and managers' roles and responsibilities in the budget process
- Sources of authority to levy and collect assessments, special assessments, and other amounts due the community association
- Basic legal procedures and alternative remedies available to a community association for collecting delinquent payments from members
- Use of a reserve study when developing a replacement reserve fund budget
- Procedures of an established collection policy
- Types and components of budgeting methods (e.g., zero-based and historical trend)
- Alternative funding methods to supplement assessment income
- Investment practices and alternatives for community associations, including knowledge of the limits on community association manager's investment duties
- AICPA guidelines as it relates to the reporting of reserves

Tasks associated with this knowledge area:

- Educate and advise the board of its role and responsibilities
- Analyze trends when preparing the budget
- Develop and update a multi-year expense and reserve projection, seeking professional assistance as necessary
- Prepare the draft annual budget, including operating expenses, capital improvements, and reserves
- Identify alternative sources of income
- Identify methods of funding for reserve requirements
- Distribute the budget as required by the governing documents and statutes
- Develop and implement effective assessment collection and accounts receivable processes
- Prepare and send assessment notices and late payment notices
- Apply late charge, interest, fines, and legal fees on delinquent accounts as directed by governing documents or board policy
- Communicate delinquency information to legal counsel
- Prepare and provide supporting documentation for outside collection action
- Maintain the community association's financial records in accordance with Generally Accepted Accounting Principles (GAAP)
- Develop and implement internal control procedures
- Develop/establish effective accounts payable procedures
- Prepare regularly scheduled financial statements and reports
- Analyze the financial statements and reports, and report significant variances to the board
- Execute investment policies developed by the board
- Identify independent accounting practitioners for association use
- Provide independent auditor and/or accountant with association's financial records, as needed

## **FINANCIAL CONTROLS (12% OF TOTAL)**

Topics Covered:

- Purpose of financial reports (e.g., general ledger, variance, accounts payable, income statement, and balance sheet)
- Methods for safeguarding association funds
- Methods for determining the financial health of a community association
- Cash flow management
- Differences between cash, accrual, and modified accrual basis accounting methods
- Auditor statements of cash flows, notes to the financial statements, and purpose of the auditor's management letter
- Components of and the difference between audit, review, and compilation

- Federal, state, and local tax filing responsibilities and filing options for community associations
- Fund reporting accounting method
- Basic principles of GAAP
- Types of financial controls

Tasks associated with this knowledge area:

- Analyze trends when preparing the budget
- Develop and update a multi-year expense and reserve projection, seeking professional assistance as necessary
- Identify methods of funding for reserve requirements
- Maintain the community association's financial records in accordance with Generally Accepted Accounting Principles (GAAP)
- Develop and implement internal control procedures
- Develop/establish effective accounts payable procedures
- Disburse association funds in a timely manner, as authorized
- Document all transfers of funds
- Prepare regularly scheduled financial statements and reports
- Analyze the financial statements and reports, and report significant variances to the board
- Execute investment policies developed by the board
- Identify independent accounting practitioners for association use
- Provide independent auditor and/or accountant with association's financial records, as needed

### **RISK MANAGEMENT AND INSURANCE (10% OF TOTAL)**

Topics Covered:

- Various types of standard and supplemental coverages, endorsements, and exclusions (e.g., directors'

and officers' liability, fidelity, wind, flood, earthquake, DIC, umbrella, and workers' compensation)

- Risk management issues and techniques relating to property, liability, monetary, and personnel exposures to loss
- Insurance requirements for contractors and consultants
- Source for community association insurance requirements
- Distinction between community association and owner insurance coverage
- Insurance claims process
- Components of an insurance contract
- Use of co-insurance and deductibles
- Relationship between insurance premiums, claims, and deductibles

Tasks associated with this knowledge area:

- Respond to resident/owner inquiries
- Identify the exposure of potential loss
- Recommend professional risk management and insurance professionals
- Develop and implement risk management techniques
- Develop and implement safety programs
- Develop and implement disaster plans
- Maintain in force insurance coverages (e.g., casualty, fidelity, liability, and property) in accordance with governing documents, statutes, and board policy
- Document, submit, and coordinate insurance claims

### **PROPERTY MAINTENANCE (8% OF TOTAL)**

Topics Covered:

- Maintenance responsibilities between the community association and the owners
- Basic maintenance for the property, physical plant, operations, and systems

- Types of maintenance programs, the steps in establishing one, and the necessary controls of these programs
- Control procedures for protecting physical assets (e.g., key and access control)
- Laws and regulations pertaining to environmental issues (e.g., recycling, pesticides, herbicides, and chemical storage)

Tasks associated with this knowledge area:

- Respond to resident/owner inquiries
- Educate and advise the board of its role and responsibilities
- Negotiate service contracts
- Identify the physical assets the community association must maintain
- Inspect the physical assets to be maintained
- Prepare and submit to the board a physical inspection report
- Provide maintenance recommendations to the board
- Develop, establish, and implement systems and controls to ensure maintenance needs are documented and completed
- Implement maintenance, repair, and replacement programs and directives from the board
- Develop and implement preventive maintenance policies
- Develop and implement an emergency maintenance program
- Receive, clarify, and respond to maintenance requests from owners

**CONTRACTING (14% OF TOTAL)**

Topics covered:

- Steps involved in negotiating contracts and key contract provisions, including knowledge of labor, materials, and performance bonds
- How to prepare a bid request and the steps involved in evaluating bids

- Criteria for deciding whether to contract work out or use association staff
- Methods for resolving contract disputes (e.g., mediation, arbitration, alternative dispute resolution, and litigation)
- Duties, responsibilities, and limitations detailed in the professional management agreement
- Contractor compliance with contract terms related to deposits, progress payments, retention, and final payments
- Types and basic components of contracts

Tasks associated with this knowledge area:

- Prepare and submit an information package concerning competitive bids to the board
- Ensure preparation of bid specifications and requests for proposals
- Identify qualified contractors
- Negotiate service contracts
- Coordinate the negotiation of contract terms by the association's attorney when appropriate
- Review a contract for key elements (e.g., parties, scope of work, and compensation)
- Ensure legal counsel reviews contract prior to signature/award when appropriate
- Ensure compliance with local ordinances prior to commencement of contracted work
- Evaluate performance under a routine contract
- Seek interpretation of and invoke contract warranties as necessary

**HUMAN RESOURCE MANAGEMENT (8% OF TOTAL)**

Topics covered:

- Applicable statutes and regulations pertaining to personnel issues (e.g., compensation and payroll, occupational safety and health statutes, and employees' records)
- Value of written personnel policies and procedures

- Basic process for recruiting, screening, selecting, evaluating, disciplining, and dismissing employees
- Value of having written job descriptions for each member of the community association staff
- Employee orientation, initial job training, ongoing training techniques, and basic principles of supervision

Tasks associated with this knowledge area:

- Develop and implement personnel policies (which are in compliance with federal, state, and local laws)
- Develop and update job descriptions for association staff
- Implement the recruiting, selecting, hiring, and firing processes for association staff
- Supervise the community association's employees
- Establish employee performance objectives, evaluate work performance, and conduct periodic reviews with employees
- Maintain and properly retain individual employee files

## STRATEGIES FOR TAKING MULTIPLE CHOICE EXAMS

Think about the amount of time you have for each question. Pace yourself. You have three hours to complete the 120 questions on the exam. There are 20 trial questions on this exam, and your responses to these questions will not be computed into your score. However, these items are interspersed throughout the exam, so you need to answer every question.

- Read all questions carefully. Skipping over a key word can entirely change the meaning of the question.

- Read all responses thoroughly before choosing an answer. There may be a subtle difference in answers that makes one answer the best choice. If you are having difficulty, compare two answers at a time until you can narrow the answers down to the correct one. There are no trick questions on the exam, but you need to be a careful reader.
- Answer the easy questions first. Don't spend too much time on one question. First answer the questions you know and then go back and try the others.
- When you're not sure, guess. You need to choose an answer for every question. Your score is based on the number of correct answers. Wrong answers are not subtracted from the total.
- Check the number sequence when you turn a page to make sure you did not skip a page.
- Mark your answers on the right spot on the answer sheet. Check carefully to make sure that your answer is in the correct space, particularly if you skipped a question, and that you filled in only one answer to a question.
- Don't worry about a pattern in your responses. The order of test responses was randomly generated, so don't change your answers to form or break up a pattern.
- After you have completed the exam, check your answer sheet to ensure that you have done everything correctly (e.g., chose only one answer per question, answered all questions, erased clearly, and left no stray marks).

## SAMPLE EXAM QUESTIONS

**A. The first resource the manager should consult to determine whether the association is responsible for a particular maintenance obligation is the:**

1. deed.
2. governing documents.
3. agreement of sale.
4. board president.
5. association's attorney.

[Answer: 2]

**B. In which document(s) would one typically find the voting rights of member owners?**

1. federal statutes.
2. board minutes.
3. individual deeds.
4. articles of incorporation.
5. association bylaws.

[Answer: 5]

**C. Fidelity insurance provides coverage to ensure that the:**

1. board will meet its fiduciary obligations.
2. manager will faithfully follow all document provisions.
3. deductible in the association's insurance policies is reimbursed.
4. association will be covered for shortfalls in the reserve accounts.
5. association will recover any funds lost through employee dishonesty.

[Answer: 5]

**D. Which of the following would a condominium unit member's personal insurance policy cover when it is the primary insurance policy?**

1. wind damage to the roof of the member's unit.
2. bodily injury due to a slip and fall in the common area in front of the member's unit.
3. bodily injury due to the association using the member's automobile.
4. bodily injury due to a slip and fall within a member's unit.
5. fire damage to the association's unimproved common walls.

[Answer: 4]

**E. The requirements of federal law regarding safety in the workplace under the Occupational Safety and Health Act include consideration of all of the following except:**

1. determination of the number of employees to do the work.
2. specialized training of employees.
3. safety equipment of the work site.
4. posting of warnings related to work site conditions.
5. reporting of accidents.

[Answer: 1]

## SECTION 4: **RECERTIFICATION**

### [RENEWAL OF YOUR CMCA]

#### **MAINTAINING CERTIFICATION RECERTIFICATION**

Recertification is an ongoing process designed to promote and demonstrate continued competency in the community association management profession. This competency can be demonstrated through participation in continuing education in the field of community association management by participating in at least 16 hours of continuing education coursework every two years.

Recertification also provides the opportunity for you to reaffirm your commitment to the CMCA Standards of Professional Conduct to your community associations, your employers, your peers, and the millions of people living in community associations.

Recertification allows professional managers to distinguish themselves as an accomplished professional committed to development of your skills and knowledge.

In order to recertify, CMCA certificants must demonstrate that they continue to be active in the community association industry and provide evidence of satisfactory completion of continuing education. Recertification occurs every two years, either April 1 or October 1, depending upon the original date of certification.

#### **RATIONALE FOR RECERTIFICATION**

The NBC-CAM Board determined the interval for recertification to be two-years. The rationale for the recertification interval is listed below:

1. Community association management is a dynamic profession with best practices and laws affecting the profession changing regularly. The laws that affect community association management and operations may change each year during state legislative sessions. In our research, we have found that it is reasonable to expect certified professionals to obtain information through continuing education opportunities about the changes in the laws and best practices every two years.
2. The interval has to be long enough to allow the certified professionals to earn the appropriate credits but short enough to keep the certified professionals motivated to engage in education and training.

3. The determination was also based on recommendations to move towards best practice which would require routine annual continued education participation annually in attempts to help certified professionals avoid long periods of education inactivity.

### CONTINUING EDUCATION REQUIREMENTS

Each manager must complete 16 hours of continuing education. Any individual who meets the continuing education requirements to maintain CAI's Association Management Specialist® (AMS®) or Professional Community Association Manager® (PCAM®) designation or the National Association of Housing Cooperatives' (NAHC) Registered Cooperative Manager (RCM®) designation, Florida's Community Association Manager license (CAM), or Nevada's Community Association Manager certificate will satisfy the current NBC-CAM continuing education requirement. However, please be advised that you must still submit a completed recertification application every two years. Your AMS, PCAM, RCM, or CAM active number and copy of your ID card must be included on the application.

### STATE-SPECIFIC REQUIREMENTS

California has developed detailed and unique laws related to community associations. Community association managers who practice in California must be familiar with a broad range of state-specific laws and regulations pertaining to community associations so they can serve their client associations effectively.

To ensure CMCA certificants have the requisite experience and education required to be certified in California, NBC-CAM has listed additional information for California CMCA certificants. Beginning January 1, 2003, all California CMCA certificants must demonstrate that they have completed **30 hours** of course-work related to community association operations which will include the California specific M-100 course offered by CAI and have taken a course in California law that complies with the Manager Certification Act. This course-work may be offered by accredited colleges or universities, or organizations approved by the California Department of Real Estate or NBC-CAM. Subsequently, managers must have taken a course in California law that complies with the California Manager Certification Titling Act revised in 2003.

For a copy of the California Manager Certification Titling Act, please visit [www.nbccam.org/cmca/state.cfm](http://www.nbccam.org/cmca/state.cfm).

California CMCA certificants are requested to submit Part G in addition to the recertification application.

### EARNING CONTINUING EDUCATION CREDITS

Credit hours may be earned only for education that meets either of the following criteria:

- It pertains to community association operations or management.
- It contributes to the professional development of the certificant.

Professional Development refers to skills and knowledge attained for personal development and career advancement. For CMCA recertification purposes, professional development encompasses a variety of facilitated learning opportunities, ranging from college degrees and coursework, conferences, professional coaching, communities workshops, seminars, symposiums, and webinars. Examples of professional development courses are community association management operations, administration, and legal requirements. In addition, courses may include accounting, human resources, and public administration. Continuing education courses must be listed on the documentation worksheet required for recertification and each recertification application and accompanying documentation form will be evaluated to ensure that the course is relevant to the continuing education of a community association manager and that it will enhance the knowledge and/or skills of a community association manager.

### RECOGNIZED COURSE PROVIDERS

Education courses offered by the following course providers are approved:

- Community Associations Institute  
[www.caionline.org](http://www.caionline.org)

- Community Associations Institute Chapters  
www.caionline.org/about/aboutchap.cfm
- National Association of Housing Cooperatives  
www.coophousing.org
- California Association of Community Managers  
www.cacm.org/education.html
- Building Owners & Managers  
Association International  
www.boma.org
- Club Managers Association of America  
www.cmaa.org
- Florida Division of Professions, for continuing  
education credit for the CAM license  
www.myfloridalicense.com
- IREM  
www.irem.org
- CertainTeed  
www.certainteed.com
- Gray Systems, Inc.  
www.graysystems.com

One-half of the continuing education credits may be obtained through in-house training courses. (In-house courses are those given by an employer company or association.) Other ways to earn credits include: local law seminars and local college or university courses pertaining to accounting, business practices, computers, or foreign language. Courses related to buying and selling real estate are not acceptable.

NBC-CAM calculates CMCA credit on an hour-for-hour basis. Thus one hour of class attended equals one hour of CMCA credit. Credit is not earned for courses less than one hour in length.

#### SELF-STUDY CREDITS

Self-study credit must be pre-approved by NBC-CAM. It is limited to no more than four hours every two years. The written request should include a description of the course (including outline, syllabus, or summary) and the estimated length of time. CAI and Institute of Real Estate Management (IREM) home-study courses are not considered self-study.

#### TEACHING CREDITS

Teaching a course that relates to community association management can qualify for continuing education credit. Two credits are earned for each class hour the first time the course is taught. When the same course is re-taught, one hour of credit is earned for each class hour.

#### AUTHORSHIP CREDITS

An article for a regional or national community association publication may qualify for continuing education credit. A copy of the published work along with the total number of words written must be submitted to NBC-CAM. The determination of the number of hours are as follows:

- 500–1,000 word article: 2 hours
- 1,001–1,500 word article: 3 hours
- 1,500+: 4 hours
- Book or journal: up to 10 hours based on individual analysis

Copies of publications must be submitted within ample time for review prior to the recertification due date.

#### VERIFICATION OF EARNED CREDITS

The certificant is responsible for monitoring continuing education status and maintaining the necessary records to substantiate satisfactory compliance with the recertification program.

Each certificant must fill out the recertification application, which must be submitted prior to the recertification date. Proof of attendance must be provided at that time.

NBC-CAM requires certificants to provide **documentation** of continuing education with recertification. This policy went into effect October 2006. The certificant is required to submit a completed recertification application along with proof of the continuing education.

Acceptable forms of documentation are:

- Completed form provided by NBC-CAM noting specifics about the continuing education
- Certificates of attendance/completion

- Agendas
- Transcripts
- Sign-in sheets
- Invitation or acknowledgement for presentation
- Course outlines
- Copies of articles (for those who author articles)

NBC-CAM will provide a form to assist you in tracking your continuing education. Keep a copy of this handy and fill it out throughout the year as you attend or participate in continuing education programs. The form is also available on the NBC-CAM website at [www.nbccam.org](http://www.nbccam.org) and will be provided in the recertification application.

### EXTENSION REQUEST

NBC-CAM allows certificants to petition for extension *no more than once*.

*The certificant must petition in writing prior to their recertification date.* The written request must address the reason for extension and outline a plan for obtaining the continuing education required. The request should be submitted in writing to NBC-CAM via email, fax, or US mail.

*NBC-CAM shall only grant extensions to those who have experienced serious hardship, i.e., illness or injury (person or family member) or any other life-altering event (military service, bankruptcy, birth of a child, divorce, or death).*

Hardship is not:

- A heavy workload
- No courses in area
- Failure to receive notification of recertification or not knowing recertification date
- Inability to travel for classes (unless certificant has experienced “hardship” indicated above)

**Certificants should not view extensions as standard practice.**

*The duration of the extension should be one year (one year from recertification date, e.g., recert date of 10/1/05, one year extension granted until 10/1/06). A certificant who is granted a one year*

*extension will be required to obtain an additional eight hours of continuing education along with the 16 that were already required (total 24 hours) and is still required to pay the current year’s annual service fee. In the certificant’s database record, their recertification date will be updated to reflect the one year extension (see above).*

A confirmation granting the extension will be mailed to certificant indicating the following:

- The recertification deadline date (which is one year after the original recertification date)
- The certification cycle plus one additional year in which the continuing education must be obtained (e.g., recert date is 10/1/05, candidate receives extension, by 10/1/06 they must have 24 hours of continuing education obtained between 10/1/04 and 10/1/06)
- Instruction to pay the current year’s annual service fee
- Instruction to send in a completed recertification application along with proof of the continuing education

Acceptable forms of proof are:

- Certificates of attendance/completion
- Agendas
- Transcripts
- Sign-in sheets (for in-service training)
- Invitation to present/thank-you for presenting letters (on inviting organization’s letterhead)
- Course outlines
- Copies of articles (for those who author articles)

**It is the certificant’s responsibility to meet the time limits of the extension and to submit the proper documents.**

*If at the end of the extension period the certificant has not recertified, their CMCA status will be terminated.*

### ANNUAL SERVICE FEE

NBC-CAM requires certificants to pay an annual fee

in order to retain the CMCA certification. The fee is paid by either April 1 or October 1, depending on the date of initial certification.

### INACTIVE STATUS

In order to maintain your CMCA certification, you must pay the CMCA Annual Service fee of \$105 and recertify by submitting your continuing education every two years. Failure to meet either of the requirements will result in termination of your CMCA certification.

### REINSTATEMENT

If your certification is inactive and you wish to have it re-activated, you must complete the reinstatement process. **In order to re-instate your CMCA, you must complete the reinstatement application and submit it along with the non-refundable \$200 reinstatement application fee.** Your certification status must not have been expired for more than a period of five (5) years. You must have continued to comply with the Standards of Professional Conduct while inactive. Finally, you must verify that you have not represented yourself as a CMCA since the termination of your

certification.

Once the application is approved, you will have a period of one (1) year to complete sixteen (16) hours of continuing education. When the first year of reinstatement has been completed, your recertification will be placed into the normal two year renewal cycle.

If your certification status has been inactive for more than five (5) years, you will be required to reapply for the CMCA certification program.

### CONFIDENTIALITY POLICY

NBC-CAM will not release any information regarding a certificant's certification to any employer, regulatory agency, or any other person or entity unless they inquire in writing to the Commission. The name and certification status of individuals who maintain the CMCA certification may be published and released upon request to employers and other interested parties.

**Exception:** NBC-CAM publishes a list of active CMCAs on the NBC-CAM website to promote the accomplishments of these certified managers.



SECTION 5: **FEE SCHEDULE  
AT-A-GLANCE**

|                                |       |
|--------------------------------|-------|
| Computer Based Exam .....      | \$300 |
| Computer Based Retest.....     | \$250 |
| Paper & Pencil Exam .....      | \$250 |
| Paper & Pencil Retest .....    | \$200 |
| Exam Transfer .....            | \$50  |
| CMCA Annual Service Fee.....   | \$105 |
| Late Recertification Fee ..... | \$25  |
| Reinstatement Fee .....        | \$200 |

Additional details about the exam can be found in other sections of this Handbook.



SECTION 6:

# CMCA STANDARDS OF PROFESSIONAL CONDUCT

[AND CODE CLARIFICATION]

## CMCA STANDARDS OF PROFESSIONAL CONDUCT

A CMCA certificant shall:

- Be knowledgeable, act and encourage clients to act in accordance with any and all federal, state and local laws applicable to community association management and operations.
- Be knowledgeable, comply and encourage clients to comply with applicable governing documents, policies and procedures of the Client Association(s) to the extent permitted by that Client.
- Not knowingly misrepresent material facts, make inaccurate statements or act in any fraudulent manner while representing Client Association(s) or acting as a CMCA.
- Not provide legal advice to Client Association(s) or any of its members, or otherwise engage in the unlicensed practice of law.
- Promptly disclose to Client Association(s) any actual or potential conflicts of interest that may involve the manager.
- Refuse to accept any form of gratuity or other remuneration from individuals or companies that could be viewed as an improper inducement to influence the manager.
- Participate in continuing professional education and satisfy all requirements to maintain the CMCA.

A violation of these Standards of Professional Conduct may be grounds for administrative action and possible revocation of the CMCA certification by NBC-CAM.

For additional information to interpret the Standards of Professional Conduct, please visit the website or contact NBC-CAM office for the CMCA Standards of Professional Conduct Code Clarification document.

These Standards are enforced through a process outlined in the Standards

of Professional Conduct Enforcement Procedures. Visit the website or contact the NBC-CAM office for a copy of the document.

## PROCEDURES FOR ENFORCEMENT OF THE CMCA STANDARDS OF PROFESSIONAL CONDUCT

### I. INTRODUCTION

A. The National Board of Certification for Community Association Managers (NBC-CAM) was established as a certification body for the evaluation of individuals who wish to enter, continue, and/or advance in the community association management profession through the certification process. The Board of Commissioners (the Board) was established as the governing body of NBC-CAM.

B. Those certified (referred to as Certificants) have successfully completed the required certification process, which includes meeting certain educational requirements and passing a certification test verifying professional knowledge. NBC-CAM Certificants subscribe to Standards of Professional Conduct established by the Board.

C. Successful candidates are granted certification by NBC-CAM and may hold themselves forth to the public as such. In order to maintain and enhance the credibility of the NBC-CAM certification program, the Board has adopted these Procedures to allow consumers and others to bring complaints concerning Certificants to the Board. In the event of a violation of the Standards of Professional Conduct, or of other substantive requirements of the certification process by a Certificant, the Board may impose sanctions against the Certificant. The grounds for sanctions under these Procedures are as follows:

1. Conviction of a felony or other crime of moral turpitude under federal or state law in a manner related to the practice of, or qualifications for, professional activity;
2. Gross negligence or willful misconduct

in the performance of professional services, or other unethical or unprofessional conduct based on demonstrable violations of the NBC-CAM Standards of Professional Conduct;

3. Fraud or misrepresentation in the application for or the maintenance of any professional membership, professional accreditation, or other professional recognition or credential; or

4. Loss of a state license required to practice community association management.

D. The Board will make reasonable efforts to ensure that information concerning the availability of the complaint process is available to the public. These Procedures apply to all complaints or inquiries received about a Certificant.

E. It should be emphasized that actions taken under these Procedures do not constitute enforcement of the law, although referral to appropriate federal, state or local government agencies may be made about a Certificant's conduct in appropriate situations. Individuals bringing complaints are not entitled to any relief or damages by virtue of this process, although they will receive notice of the actions taken.

F. The Board reserves the right to waive or vary these procedures in any situation where a state or other governmental entity recognizing the certification has additional or conflicting requirements for enforcement.

G. The Board reserves the right to self-initiate complaints.

### II. LEADERSHIP

#### A. Board of Commissioners

1. The Board is responsible for the development and administration of the certification program and for implementation of these procedures. The Board is composed of nine individuals nominated in accordance with the NBC-CAM By-Laws.

2. The Board elects one of its members to

serve as Chair (Chair of the Board) as prescribed in the By-Laws. The Chair of the Board presides at all board meetings and is responsible for ensuring that these Procedures are implemented and followed.

3. The Chair of the Board appoints members of the Professional Conduct and Enforcement Committee.

#### B. Professional Conduct and Enforcement Committee

1. The Professional Conduct and Enforcement Committee consists of at least three members of the Board, including a Committee Chair as appointed by the Chair of the Board.

2. The Committee is responsible for monitoring the Standards of Professional Conduct and Enforcement Procedures and making recommendations to the Board as appropriate.

#### C. Complaint Review Panel

1. The Complaint Review Panel (Review Panel) consists of at least twelve members appointed by the Chair of the Board and approved by the Board. Members shall serve for two year, staggered terms. Manager members must be CMCA certificants. Non-manager members will have community association operational experience and represent approximately one-third of the composition of the Review Panel.

2. The Professional Conduct and Enforcement Committee Chair will serve as the Review Panel Chair. The Panel Chair will rotate investigative and Hearing Panel assignments among the Review Panel members.

D. All Board members, Review Panel members, Staff, and other individuals engaged in investigations or decisions with respect to any complaints under these Procedures shall be indemnified and defended by NBC-CAM against liability arising from related NBC-CAM activities to the extent

provided by law.

### III. COMPLAINTS

A. A complaint must be in writing and signed by the individual(s) bringing the complaint (Complainant). The complaint is to be addressed to the Executive Director of NBC-CAM and it should indicate specifically what aspects of the Standards of Professional Conduct are in question. In addition, the complaint should include materials that directly support the allegation. The Executive Director and Review Panel Chair will review the complaint letter.

B. Should both the Executive Director and Review Panel Chair conclude, in their sole discretion, that the submission:

1. contains unreliable or insufficient information, or

2. is patently frivolous or inconsequential,

they may determine that the submission does not constitute a valid and actionable complaint that would justify bringing it before the Review Panel for investigation and a determination of whether there has been a violation of the Standards of Professional Conduct or any other substantive requirements of the certification process. In such cases, the submission is disposed of by notice from the Executive Director to the Complainant. All such preliminary dispositions by the Executive Director and Review Panel Chair are reported to the Board, the Complainant, and to the Certificant. The name of the Complaint will be kept confidential, unless the Executive Director and the Review Panel Chair agree to release it.

C. If a submission is deemed by either the Review Panel Chair or the Executive Director to be a valid complaint, the Executive Director shall see that written notice is provided to the Certificant whose conduct has been called into question. The Executive Director shall ensure that the Complainant receives notice that the complaint is being reviewed.

D. If a submission is deemed by either the Review Panel Chair or the Executive Director to

allege violations only of federal, state, or local law, then any investigation of the complaint may be stayed until a court of competent jurisdiction determines whether a violation has occurred. In this circumstance, the Executive Director will inform the Complainant and Certificant of the stay of action and that the investigation may resume once a court decision is released.

E. The Complainant shall be advised in writing whether the complaint will be investigated further (as outlined in IV below) or dismissed (by the criteria outlined in III(B) above) within forty-five (45) business days of the complaint being received by the Executive Director and Review Panel Chair.

F. If further information is needed, the Investigator will request additional information from the Complainant to substantiate the allegation. The Complainant must provide the information requested within fourteen (14) days of the request. If the information is not provided during this time, the Investigator may recommend closing the investigation to the Review Panel Chair. The Chair will make the decision to close the Investigation.

G. All complaints must be kept confidential by the complainant. NBC-CAM will maintain confidentially as outlined in other areas of these procedures.

#### IV. COMPLAINT INVESTIGATION

A. If the complaint has been deemed by either the Review Panel Chair or the Executive Director to be a valid complaint, and then the steps detailed below will be followed.

B. The Review Panel Chair will appoint one or more members (Investigating Member) of the Review Panel to conduct an investigation. The Investigating Member will investigate and make appropriate determinations with respect to the complaint.

1. The Investigating Member is authorized to conduct an investigation into the specific facts and circumstances to whatever extent is necessary to clarify, expand, corroborate, or dispute the information pro-

vided by the Complainant.

2. The Complainant, the Certificant who is the subject of the investigation, his or her employer, and others may be contacted for additional information with respect to the complaint. The Investigating Member may contact such other individuals who may have knowledge of the facts and circumstances surrounding the complaint. The Investigating Member has the discretion to reveal the name of the Complainant, or send the Complaint to the Certificant, if the Investigating Member deems that the investigation will be furthered by so doing.

3. Complainants are required to fulfill requests for additional materials within fourteen (14) business days of request.

4. This investigation may involve requests for additional information, travel, and investigation by telephone or other communications, or whatever steps deemed reasonably appropriate.

5. All investigations will be conducted in confidence, with all written communications sealed and marked "Personal and confidential," as appropriate. The investigations will be conducted objectively, without any indication of prejudice. An investigation may be directed toward any aspect of a complaint that is relevant or potentially relevant.

6. The Review Panel Chair exercises general supervision over all investigations.

7. Participants in the investigation shall be reimbursed for reasonable expenses incurred in connection with their activities.

C. The Investigating Member must prepare a written objective summary of the charges and facts, findings, and a recommendation within forty-five (45) business days of his/her appointment. If additional time is needed for the inves-

tigation, the Investigating Member must provide a written request for an extension of time with justification for the extension to the Review Panel Chair and the Executive Director at least ten (10) business days prior to the recommendation deadline. The recommendation must be one of the following:

1. No further action is required.
  - a. This recommendation is warranted should the complaint be found to be inaccurate or not supported by a preponderance of the evidence to warrant further action by the Review Panel.
  - b. Should the Review Panel Chair and the Executive Director agree with the recommendation, then the Complainant and the Certificant shall be notified in writing. If either disagrees, then Review Panel consideration is required.

2. Review Panel consideration of sanctions

This recommendation is made when a preponderance of the evidence adequately supports the complaint.

## V. HEARING PROCESS

- A. If the recommendation is for consideration of sanction, the Certificant shall receive a copy of the Investigating Member's report. The Executive Director will send a copy of that report and the complaint with an indication that either an in-person or a telephonic hearing will be held. The Certificant has thirty (30) business days to respond in writing to the complaint and report.
- B. The Review Panel Chair shall appoint a minimum of four additional members from the Review Panel to serve as a hearing panel (Hearing Panel) for this complaint. Those members should have no perceived conflict of interest with the Certificant or Complainant. The Hearing Panel will also include, to the extent possible, a non-manager member. The Review Panel Chair will be the Hearing Panel Chair.
- C. In a case when the Review Panel Chair has convened a hearing against the Investigating

Member's recommendation as provided in IV(C) (1) (b), the Review Panel Chair will recuse himself or herself from the Hearing Panel and appoint another Review Panel member to the Hearing Panel. In that case, another Hearing Panel member will be the Hearing Panel Chair.

D. Each member of the Review Panel, the Certificant, and the Complainant shall receive a copy of the complaint, the report of the Investigating Member, and the response from the Certificant.

E. Should the Executive Director determine that the hearing will be telephonic; the Certificant may request a personal appearance before the Hearing Panel within thirty (30) business days of the hearing notice. The Hearing Panel shall first determine whether to grant the request. The Certificant may also waive a hearing, relying on written submissions, a paper hearing, to the Hearing Panel.

F. In most circumstances, a telephonic hearing or paper hearing, rather than a formal, in-person hearing will be held. If the Certificant waives a hearing, the hearing will be conducted only by the Hearing Panel and will specifically exclude the Investigating Member.

G. Should the Review Panel determine that a telephonic or in-person hearing is appropriate; the Executive Director will arrange such a hearing. The parties involved may be represented by legal counsel. The hearing shall be conducted by the Review Panel Chair, with presentations made by both the Investigating Member and the Certificant involved. The Complainant may also be present at the hearing, but may only speak if permitted by the Hearing Panel Chair. The Hearing Panel Chair and the Hearing Panel members may ask questions of the Investigator, the Certificant, or the Complainant during the hearing. The Investigator and the Certificant will be permitted to question each other or the Complainant during the hearing. Deliberations made by the Hearing Panel will be conducted in the absence of the Investigating Member, the Complainant, and the Certificant.

## VI. DETERMINATION OF VIOLATION

A. At the conclusion of the telephonic, paper, or in-person hearing, the Hearing Panel shall reach its conclusion by majority vote. The Hearing Panel's decision will center on whether there has been a violation of the Standards of Professional Conduct or other substantive requirements of the certification process.

B. Should the Hearing Panel determine by a preponderance of the evidence that there has been a violation; the Hearing Panel shall also determine the appropriate sanctions as provided in VII below. In that case, the Hearing Panel's decision will be sent to Review Panel members and Board members for informational purposes only. The Hearing Panel's decision will also be sent to the Complainant and the Certificant and the Certificant's employer (if applicable). If the Hearing Panel determines that no violation has occurred, the Complaint shall be dismissed with notice to the Certificant, the Certificant's employer (if applicable), any person contacted in the course of the investigation, and the Complainant.

## VII. SANCTIONS

A. Any of the following sanctions, or others as deemed appropriate, may be imposed by the Hearing Panel upon a Certificant. The sanction applied must reasonably relate to the nature and severity of the violation, focusing on reformation of the conduct of the member and deterrence of similar conduct by others:

1. public or private written reprimand to the certificant;
2. suspension of the certificant for a designated period; or
3. revocation of the Certificants's certification.

The Hearing Panel reserves the right to impose a combination of sanctions. If the certification is suspended or revoked, a summary of the determination and the sanction with the Certificant's name will be published by the Board in the NBC-CAM newsletter.

B. If certification is revoked, any and all certificates or other materials requested by the Board must be returned promptly to NBC-CAM.

C. Certificants who have had their certification suspended may not reapply for certification for the period of time set by the Hearing Panel. The Hearing Panel reserves the right to impose certain conditions or requirements to be met before reinstatement.

## VIII. APPEAL

A. Within thirty (30) business days from receipt of notice of a determination by the Hearing Panel that a certificant has violated the Standards of Professional Conduct, the Certificant may submit a written request for an appeal to the Chair. No formal hearing is necessary, nor personal appearance required. Upon receipt of a request for appeal, the Chair shall appoint a special Appeals Committee consisting of no less than three nor more than five individuals serving on the Board who were not members of the Hearing Panel. No one with any personal involvement or conflict of interest may participate in the appeals process.

B. Until such time as the appeal has been conducted, the Certificant may not use the CMCA certification mark or make any reference to being certified. However, no revocation, suspension, or publication begins until the appeal is completed.

C. The Appeals Committee may only review whether the determination made by the Hearing Panel of a violation of the Standards of Professional Conduct was inappropriate because of:

1. material errors of fact, or
2. failure of the Hearing Panel to conform to published criteria, policies or procedures.

Only facts and conditions up to and including the time of the determination of the Hearing Panel as represented by facts known to the Hearing Panel are considered during appeal.

D. The Appeals Committee shall conduct and complete the appeal within ninety (90) business days after receipt of the request for appeal. Writ-

ten appellate submissions and any reply submissions may be made by authorized representatives of the Certificant and of the Hearing Panel. Submissions are made according to whatever schedule is reasonably established by the Appeals Committee.

E. If the Appeals Committee concurs with the recommendation of the Hearing Panel, the determination and imposition of a sanction shall be promulgated by written notice to the Certificant, the Certificant's employer (if applicable), and the Complainant. The Appeals Committee's decision shall either affirm or overrule the determination made by the Hearing Panel, but shall not address a sanction imposed by the Hearing Panel if the decision is upheld. The decision of the Appeals Committee is final.

#### IX. REDESIGNATION

A. If a Certificant who is the subject of a complaint voluntarily surrenders his or her National Board Certification at any time during the pendency of a complaint under these procedures, the complaint is dismissed without any further action by the Review Panel or the Board. The entire record is sealed and the individual may not reapply for certification by NBC-CAM. However, the Board may authorize the Chair of the Board to communicate the fact and date of resignation, and the fact and general nature of the complaint that was pending at the time of resignation, to or at the request of a government entity engaged in the administration of law. Similarly, in the event of such resignation, the Certificant's employer and the Complainant(s) shall be notified of the fact and date of resignation and that the Board has dismissed the complaint as a result.

B. If a Certificant who is the subject of a complaint permits the certification to expire during the pendency of the complaint investigation and hearing process, the complaint will be dismissed without further action by the Review Panel or the Board. If, however, the Certificant reapplies for certification, then the investigation shall be reopened and the hearing process continued.

#### X. RECERTIFICATION

The Board is also responsible for review of the recertification process, under requirements for recertification promulgated by the Board. The Chair of the Board shall appoint a Board sub-committee from members of the Board, which shall review all matters concerning recertification. The Committee will recommend appropriate actions in all situations, for final approval by the Board. An individual who is denied recertification may appeal the decision to the Board, but has no right of formal appeal under the appeal procedures above.

#### XI. Timeline as Set Forth in these Procedures

##### DEADLINE

|         |   |
|---------|---|
| Day 1   | Complaint Received  |
| Day 8   | Executive Director notifies Complainant that complaint is being reviewed                                    |
| Day 8   | Executive Director notifies Certificant that a complaint has been filed against them and is being reviewed. |
| Day 46  | Review Panel Chair and Executive Determine if complaint requires an investigation.                          |
| Day 46  | Review Panel Chair appoints Investigating Member(s), if necessary   |
| Day 53  | Executive Director notify Complainant and Certificant if an Investigation will ensue                        |
| Day 81  | Investigating Member(s) must request extension if necessary   |
| Day 91  | Investigating Member(s) written report must be submitted to the Executive Director                          |
| Day 98  | Executive Director notify Complainant and Certificant of the results of the Investigation                   |
| Day 128 | Complainant must provide response to Executive Director regarding Investigation results                     |

## Hearing

Day 7 from Hearing Results

Executive Director must notify Certificant and Complainant of hearing results

Day 30 from Hearing Results

Appeal must be filed by Complainant

## CMCA STANDARDS OF PROFESSIONAL CONDUCT CODE CLARIFICATION

### A. AUTHORITY

The Standards derive authority from the NBC-CAM. NBC-CAM has established these standards of professional conduct for those individuals who hold the CMCA certification.

### B. DEFINITIONS

The Standards shall apply in any manager-client relationship where the manager received some form of compensation for professional services offered or provided to the client.

1. Manager - a singular term which shall apply to all of the following persons providing or offering some form of property or financial or administrative or consulting services to one or more clients:

- a. A single practitioner functioning as a client employee, or
- b. A single practitioner employed by a firm contracted by one or more clients, or
- c. A principal or supervisory staff member for a firm which is contracted by one or more clients.

An individual who agrees to abide by the Standards shall also be responsible to see that any person under his/her supervision shall comply with the Standards.

2. Client - a singular term which shall apply to one or more community association properties (condominium, homeowner association, cooperative, PUDs, PRDs, etc.) and their governing boards. The client may employ the manager directly or be under some form of independent contract with a firm which employs the manager.

### C. AMPLIFICATIONS

The following information and examples are provided by NBC-CAM to further explain some of the seven tenets of the Standards.

1. To act in accordance with state and federal laws which relate to community associations. A manager must be knowledgeable of the laws and govern their actions in accordance with those laws.

2. To comply with the governing documents means to implement policies and procedures in accordance with the documents. An example would be that if the governing documents prohibit fines for owners in violation of the documents, the manager should not recommend fining as a method to the Client's Board.

3. Always be truthful.

4. Any legal advice should be provided to the association by the association attorney. This includes drafting of amendments to the documents, and the interpretation of legal language that affects board action.

5. Disclosure of any possible conflict of interest is key here. An example may be of assistance. A manager (individually or through a company) may have financial interest in a service contractor, supplier or professional firm which is being considered by that manager's client. Disclosure must be in writing and sufficiently in advance of the selection process to allow full consideration of the possible conflict and any alternatives. The fact that the client may still choose the manager's related entity is not a violation of the Standards, provided ample disclosure was given.

6. NBC-CAM recommends managers do not accept gifts and/or service-in-kind from vendors and/or contractors of any substantive value. Gifts worth less than \$50 are not viewed as having influence on a manager.

7. Continuing professional education requirements would be consistent with that manager's professional designations, if any, and the NBC-CAM redesignation requirements.

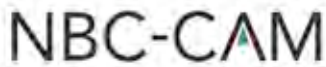
### D. FUTURE

NBC-CAM may expand application of these Stan-

dards, and NBC-CAM reserves the right to update, or amend both the CMCA Standards and this Clarification Document. Any such revision, updating or amendment shall be promptly promulgated to those who achieve a CMCA and, after due notice, will apply to all members subject to the Standards.

#### E. DISCIPLINARY ACTIONS

After an internal investigation and hearing as provided in NBC-CAM's Enforcement Procedures Policy, a manager found to be in violation of the Standards shall face a sanction in accordance with the enforcement policies adopted by NBC-CAM. The extent of such sanction shall be commensurate with the nature, severity and intent of the violation.



National Board of Certification  
for Community Association Managers

## Procedures to File a Complaint Against a CMCA®

### Overview

A CMCA is a voluntary certification earned by community managers. A person holding a CMCA certification has committed to uphold the CMCA Standards of Professional Conduct. If you believe a person holding a current CMCA certification has not upheld one or more of the Standards, you may file a complaint against the CMCA.

### Standards of Professional Conduct

1. Be knowledgeable, act, and encourage clients to act in accordance with any and all federal, state and local laws applicable to community association management and operations.
2. Be knowledgeable, comply, and encourage clients to comply with the applicable governing documents, policies and procedures of the Client Association(s) to the extent permitted by the Client.
3. Not knowingly misrepresent material facts, make inaccurate statements or act in any fraudulent manner while representing Client Association(s) or acting as a CMCA certificant.
4. Not provide legal advice to Client Association(s) or any of its members, or otherwise engage in the unlicensed practice of law.
5. Promptly disclose to Client Association(s) any actual or potential conflicts of interest that may involve the manager.
6. Refuse to accept any form of gratuity or other remuneration from individuals or companies that could be viewed as an improper inducement to influence the manager.
7. Participate in continuing professional education and satisfy all requirements to maintain the CMCA.

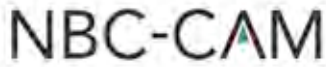
Violations of any of these Standards of Professional Conduct may be grounds for administrative action and possible revocation of the CMCA certification by the National Board of Certification for Community Association Managers.

For further information about the process for complaint review and enforcement procedures for the Standards of Professional Conduct, please visit our web site at [www.nbccam.org](http://www.nbccam.org) or contact our office at 703-836-6902.

*NBC-CAM administers the only national certification program for community association managers. NBC-CAM grants the CMCA credential to individuals who demonstrate fundamental knowledge and expertise in managing homeowner and condominium associations and cooperatives.*

#### **NBC-CAM**

225 Reinekers Lane, Suite 310  
Alexandria, VA 22314  
703-836-6905 \* 1-866-779-CMCA  
703-684-1581 Fax  
[www.nbccam.org](http://www.nbccam.org)



National Board of Certification  
for Community Association Managers

### File a Complaint against a CMCA® - Complaint Form

Please report your complaint in as much detail as possible. NBC-CAM may request additional information if needed and may request a personal interview if it appears necessary. Because one of the functions of the NBC-CAM Board is the evaluation of complaints, please be assured that your complaint will be investigated vigorously and impartially.

**Date Submitted:** \_\_\_\_\_

- 1. Please enter the contact information on the CMCA against who this complaint is being filed: (If there is more than one CMCA, please file separate complaints.)

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

- 2. Please enter your personal information:

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

- 3. Please enter information about your complaint. On a separate sheet, please describe the complaint and the reasons you believe a violation of a specific Standard of Professional Conduct exists. Please indicate which of the [Standards of Professional Conduct](#) has (have) been violated. In addition, please provide official documentation (meeting minutes, correspondence, etc...) to substantiate the complaint. Please highlight the relevant areas in the official documentation.

Have you begun legal action against this individual?

\_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, please provide detail: \_\_\_\_\_

Have you notified any authorities in connection with your complaint? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, please provide details: \_\_\_\_\_

What is your business relationship with this individual?

\_\_\_\_\_ I am a member of the community managed by this person.

\_\_\_\_\_ I am member of the board of directors of the community managed by this person.

\_\_\_\_\_ Other (please specify) \_\_\_\_\_

- 4. Please sign and date the complaint form.

Signature \_\_\_\_\_ Date: \_\_\_\_\_

- 5. Please submit the complaint form to:

**NBC-CAM**  
Attn: Confidential Complaint  
225 Reinekers Lane, Suite 310 \* Alexandria, VA 22314  
703-836-6905 \* 1-866-779-CMCA  
703-684-1581 Fax



## SECTION 7:

# CMCA PROGRAM POLICIES

### USING THE CREDENTIAL

Candidates who successfully complete the education and examination requirements prescribed by NBC-CAM are awarded the credentials of Certified Manager of Community Associations (CMCA). A CMCA certificant in good standing is entitled to:

- Use the CMCA credential after his/her name.
- Use the CMCA title and logo in correspondence, brochures, proposals, business cards, advertisements, and other communications with the public.
- Display the formal certificate issued by NBC-CAM.
- Use any other certification, trademarks, or materials owned by NBC-CAM whose non-exclusive use is licensed.

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### CMCA LOGO USAGE

Managers that have earned the CMCA certification and are currently in good standing with NBC-CAM have the right to use the approved CMCA logo.

There are three approved configurations of the CMCA logo. Each must always be treated as a single entity, should not be altered in any way, and should not be recreated.

Those managers who have earned the CMCA certification should always use the initials “CMCA” following their name (e.g., Jane R. Thomas, CMCA®). This is an ideal way to state the achievement in proposals, letters, business cards, bylines, and other circumstances when space does not permit the use of any of the logo iterations. The registered (®) symbol should be used only with the first instance the CMCA initials and the full title “Certified Manager of Community Associations” appear in any publication. It is not necessary to use the symbol with subsequent appearances within the same publication.

### SIZE

The initials-only version of the logo should not appear smaller than .75" wide. The version that includes “Certified Manager of Community Associations”

(without tagline) should not appear smaller than 1.25" wide. The full-blown logo (with name and tagline) should not appear smaller than 1.5" wide. None of the logo versions should appear larger than 2.75" wide on an 8.5" x 11" page.

#### COLOR

The logo should always appear in one color only. Approved color applications include all black, all PMS 3015, or all white reversed out of a dark background. Do not place the logo within a box.

#### ELECTRONIC FILES

Two file formats are provided for your use on the NBC-CAM website ([www.nbccam.org](http://www.nbccam.org)). Select a file format according to the application program you are using.

- **EPS file:** Use this file when sending your document to a commercial printer or importing into a page layout application such as QuarkXPress or PageMaker. The logo may look fuzzy in preview, but it will print at a high quality resolution when sent to a commercial printer or printed to a postscript office printer.

- **TIF file:** Use this file when placing into a word processing application such as Microsoft Word or Excel. Do not enlarge more than 125% or reduce less than 50% for best quality of resolution.

#### USING THE LOGO ON YOUR WEBSITE

Make it easy for your website visitors to access an abundance of information about the CMCA certification and the National Board of Certification for Community Association Managers by including a logo link to NBC-CAM's website on your own website. For web-ready logos and detailed instructions on how to include the links on your website, visit [www.nbccam.org](http://www.nbccam.org).

#### QUESTIONS?

For certification status or authority to use the CMCA logo, contact NBC-CAM at 703.836.6902.

The CMCA logo is the property of NBC-CAM and has copyright protection through the U.S. Patent and Trademark Office. Any infringement of the instructions contained herein regarding the use of the logo, print specifications, size, etc., may result in legal action and/or suspension of the CMCA certification.

### LOGO CONFIGURATIONS

The logos should not appear any smaller than shown here.

MIN. WIDTH .75"



LOGO WITH INITIALS ONLY

MIN. WIDTH 1.25"



LOGO WITH NAME

MIN. WIDTH 1.5"



LOGO WITH NAME AND TAGLINE

Awarded by the National Board of Certification  
for Community Association Managers

### CHANGE OF ADDRESS

NBC-CAM uses home addresses to correspond with its candidates and certificants. If you change your address you must notify NBC-CAM as soon as possible. Failure to do so may cause you to miss important updates on the CMCA program that could affect your certification. Changes of address should be sent to NBC-CAM. They must be in writing, but can be sent via letter, fax, or email.

If a CMCA certificant moves to or begins practicing in a state that has additional requirements not previously met, those requirements must be met prior to any use of the certification in that state.

### WEBSITE

Information regarding NBC-CAM and the certification program can be found on our website at [www.nbccam.org](http://www.nbccam.org). The exam application, study guide, handbook, retake application, and recertification application are all documents that can be downloaded and printed from the site. The site includes a "For CMCA's Only" section which contains recertification information, as well as a program overview, a directory, and FAQ's.

## APPLICATION APPEAL

If an application is denied, an applicant may submit an appeal in writing to the NBC-CAM Board of Commissioners. The appeal will be reviewed by the NBC-CAM Board of Commissioners at their next regularly scheduled meeting.

## CONFIDENTIALITY POLICY

NBC-CAM will not release any information regarding a candidate's examination application and a candidate's examination administration to any employer, regulatory agency, or any other person or entity unless they inquire in writing to the Commission. The name and certification status of individuals who have successfully completed the CMCA Examination may be published and released upon request to employers and other interested parties. NBC-CAM and HumRRO will discuss score-related matters with the candidate or the candidate's legal representative only.

## MEMBERSHIP POLICY

There are no membership requirements to participating in the CMCA certification program.

## NON-DISCRIMINATION POLICY

NBC-CAM does not discriminate against any persons on the basis of race, color, ethnicity, national origin, religion, creed, age, gender, sexual orientation, marital status, medical condition, or physical disability.

## PROFESSIONAL PRACTICE POLICY

A certificant is required to attest that they continue to be active in the community association industry.

## RECERTIFICATION PURPOSE AND POLICY

Recertification is an ongoing process designed to promote and demonstrate continued competency in the community association management profession. This competency can be demonstrated through participation in continuing education in the field of community association management by participating in at least 16 hours of continuing education coursework every two

years.

Recertification also provides the opportunity for you to reaffirm your commitment to the CMCA Standards of Professional Conduct to your community associations, your employers, your peers, and the millions of people living in community associations.

Recertification allows professional managers to distinguish themselves as an accomplished professional committed to development of your skills and knowledge.

**To recertify and retain the CMCA certification, a certificant must:**

1. Continue to be active in the community association industry.
2. Satisfy continuing education requirements outlined below.
3. Pay the annual service fee.
4. Complete and submit the Recertification Application.
5. Adhere to the CMCA Standards of Professional Conduct.

## RECORD RETENTION POLICY

NBC-CAM will compile and file records for each CMCA applicant and certificant and will retain the applications as follows:

- New application will be stored permanently in an electronic manner.
- Recertification and reinstatement applications will be stored for four years and will be destroyed after four years.

## REFUND AND WITHDRAWAL POLICY

The exam fees are nonrefundable. There is no limit on the number of times a candidate may take the exam.

Carefully select your testing date and location. If you wish to change your testing date or location or withdraw from the examination within two weeks of the test date, a \$50 administrative penalty fee will be applied. A written notification must be received for any request for refunds, rescheduling, or withdrawals.

LaserGrade: If you need to reschedule your com-

puter based testing (CBT) appointment, you must contact your LaserGrade testing center no later than noon, Eastern Standard Time, of the third business day prior to your scheduled appointment. Leaving a message on an answering machine is not an acceptable method of canceling or rescheduling your appointment.

If you fail to arrive for your appointment or cancel without giving the required notice, you will forfeit your testing fee.

### **REINSTATEMENT POLICY**

Individuals wishing to reinstate their CMCA after termination, must comply with the following requirements:

- Applicant's certification status must not have been expired for more than a period of five (5) years.
- Applicant must submit a non-refundable \$200 reinstatement application fee.
- Applicant must have continued to comply with the CMCA Standards of Professional Conduct.

- Applicant will have a period of one year to complete 16 hours of continuing education.
- Applicant will be required to confirm that applicant has not represented him/herself as a CMCA since the termination of certification.

### **SPECIAL ACCOMMODATIONS POLICY**

NBC-CAM abides by all applicable federal and state statutes relating to the accommodation of disabled individuals. All requests for special accommodations must be submitted in writing along with the submission of the application. Testing accommodations for candidates with disabilities will be made only with the authorization of the board.

Candidates who have requested special testing accommodations from the board should not schedule an appointment to take the examination until receiving written confirmation of the accommodations.

SECTION 8: **APPLICATIONS  
AND FORMS**





1. Name  Mr.  Mrs.  Ms. First \_\_\_\_\_ Middle \_\_\_\_\_  
Last \_\_\_\_\_  
Title \_\_\_\_\_  
Designations (if any) \_\_\_\_\_  
Are you a veteran of the United States Armed Forces?  Yes  No

2. Residence Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Home phone \_\_\_\_\_ Cell phone \_\_\_\_\_  
Email address \_\_\_\_\_

3. Firm Name \_\_\_\_\_  
Business Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Office phone \_\_\_\_\_ Fax number \_\_\_\_\_  
Email address \_\_\_\_\_

4. List the state(s) in which you are currently practicing or will soon be practicing community association management: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Have you been convicted of a felony or misdemeanor in the last 10 years?  
 Yes  No *If "yes," submit statement of explanation and relevant information including court document(s).*

6. Have you ever had a license, certification, registration or permit to practice any regulated profession revoked, suspended, relinquished or withdrawn?  
 Yes  No *If "yes," submit statement of explanation and relevant information including court document(s).*

7. **Experience Requirement.** If a professional has at least five (5) years experience as a community association manager, they may receive a one-time waiver of the prerequisite course. The experience must be as a community association manager – not as an assistant manager. Please list the experience on page 10 of this application. If the candidate does not successfully pass the examination the first time, they will be required to take a prerequisite course prior to retaking the examination.

8. **Educational Requirement.** Satisfactory completion of a prerequisite course. Please complete the information below and attach the certificate of completion to the application:  
 I took Community Association Institute's (CAI) M-100 as a course conducted:  
date: \_\_\_\_\_  
location: \_\_\_\_\_  
 Classroom  Online  Home Study

M-100: The Essentials of Community Association Management offered by CAI. For course dates, locations, fees, and registration information, visit [www.caionline.org](http://www.caionline.org)

Please initial each page before submitting completed application \_\_\_\_\_

- I took Weissman, Nowack Curry & Wilco, PC's course  
date: \_\_\_\_\_  
location: \_\_\_\_\_

Weissman, Nowack Curry & Wilco, PC's - 2010 Community Association Management Course administered through the Georgia Institute of Real Estate. For course dates, locations, fees, and registration information, visit [www.learningrealestate.com/cam.htm](http://www.learningrealestate.com/cam.htm)

9. **Applicants with Special Needs.** Candidates who need modifications in the CMCA Examination administration because of special needs should telephone 866.779.CMCA or 703.836.6902 or submit requests in writing with this application, at least 60 days before you wish to take the examination.
10. **Agreement and Compliance.** The applicant has the responsibility to read, understand, and comply with all aspects of the certification program as outlined in the Certified Manager of Community Associations (CMCA) Handbook.

I hereby apply to obtain the Certified Manager of Community Associations (CMCA) certification. I understand this certification depends on the successful completion of specific requirements and that the following policies apply:

- I have read and understand the information contained in the CMCA Handbook.
- To the best of my knowledge, the information in this application is correct and complete.
- I acknowledge that NBC-CAM reserves the right to verify information on this application.
- I agree to abide by the CMCA Standards of Professional Conduct and understand that alleged violations of the Standards, including incorrect, fraudulent, or misleading information on this application, may prompt a review under NBC-CAM administrative procedures.
- I acknowledge that the information accrued in the certification process may be used for statistical or other purposes by NBC-CAM. The information in my records will be treated confidentially, except as otherwise provided by law.
- I recognize that the CMCA examination is developed to test my knowledge in the profession of community association management. The examination answer sheets are the property of NBC-CAM and will not be returned to me.
- I will be informed only whether I have passed or failed the examination. If I fail, I may ask for a review of the accuracy of my answers and there is no other appeal of the results. NBC-CAM reserves the right to withhold or cancel my scores or revoke certification if there is any evidence of cheating, improper conduct, or other irregularities.

Signature of Applicant \_\_\_\_\_

Print Name *(As it should appear on certificate)* \_\_\_\_\_

Date \_\_\_\_\_

(Please be certain to include your signature on page 4 as well.)

Please initial each page before submitting completed application \_\_\_\_\_

**REQUIREMENTS AND POLICIES**

**Requirements:**

*Applicants with Special Needs.* Candidates who need modifications in the CMCA examination administration because of special needs should telephone 703.836.6902 or 866.779.CMCA to submit requests in writing with this application, at least 60 days before you wish to take the examination.

*Agreement and Compliance.* The applicant has the responsibility to read, understand and comply with all aspects of the certification program as outlined in the CMCA Handbook.

**Policies:**

I hereby apply to the CMCA certification. I understand this certification depends on the successful completion of specific requirements and that the following policies apply:

I have read and understand the information contained in the CMCA Handbook.

To the best of my knowledge, the information in this application is correct and complete.

I acknowledge that NBC-CAM reserves the right to verify information on this application.

I agree to abide by the CMCA Standards of Professional Conduct and understand that alleged violations of the Standards, including incorrect, fraudulent, or misleading information on this application, may prompt a review under NBC-CAM administrative procedures.

I acknowledge that the information accrued in the certification process may be used for statistical or other purposes by NBC-CAM. The information in my records will be treated confidentially, except as otherwise provided by law.

I recognize that the CMCA Examination is developed to test my knowledge in the profession of community association management. The examination answer sheets are the property of NBC-CAM and will not be returned to me.

I will be informed only whether I have passed or failed the examination. If I fail, I may ask for a review of the accuracy of my answers and there is no other appeal of the results. NBC-CAM reserves the right to withhold or cancel my scores or revoke certification if there is any evidence of cheating, improper conduct or other irregularities.

\_\_\_\_\_  
Signature of Applicant Date

\_\_\_\_\_  
Print Name (As it should appear on certificate)

Please initial each page before submitting completed application \_\_\_\_\_

## CMCA STANDARDS OF PROFESSIONAL CONDUCT

A CMCA certificant shall:

- Be knowledgeable, act and encourage clients to act in accordance with any and all federal, state and local laws applicable to community association management and operations.
- Be knowledgeable, comply and encourage clients to comply with the applicable governing documents, policies and procedures of Client Association(s) to the extent permitted by that Client.
- Not knowingly misrepresent material facts, make inaccurate statements or act in any fraudulent manner while representing Client Association(s) or acting as a CMCA.
- Not provide legal advice to Client Association(s) or any of its members, or otherwise engage in the unlicensed practice of law.
- Promptly disclose to Client Association(s) any actual or potential conflicts of interest that may involve the manager.
- Refuse to accept any form of gratuity or other remuneration from individuals or companies that could be viewed as an improper inducement to influence the manager.
- Participate in continuing professional education and satisfy all requirements to maintain the CMCA.

A violation of any of these CMCA Standards of Professional Conduct may be grounds for administrative action and possible revocation of the CMCA certification by the NBC-CAM.

For additional information to interpret the CMCA Standards of Professional Conduct, please visit the website ([www.nbccam.org/program/standards.cfm](http://www.nbccam.org/program/standards.cfm)) or contact the NBC-CAM office for the CMCA Standards of Professional Conduct Code Clarification document.

These Standards are enforced through a process outlined in the CMCA Standards of Professional Conduct Enforcement Procedures. Visit the website ([www.nbccam.org/program/standards.cfm](http://www.nbccam.org/program/standards.cfm)) or contact NBC-CAM office for a copy of the document.

## STATE SPECIFIC REQUIREMENTS

Eight states have taken steps to regulate the community association management profession. You will find additional information about the specific regulations for these states on our website:

[www.nbccam.org/cmca/state.cfm](http://www.nbccam.org/cmca/state.cfm)

|         |            |             |                      |
|---------|------------|-------------|----------------------|
| Alaska  | California | Connecticut | District of Columbia |
| Florida | Georgia    | Nevada      | Virginia             |

## INFORMATION FOR CALIFORNIA MANAGERS ONLY

California has developed detailed and unique laws relating to community associations. Community association managers who practice in California must be familiar with a broad range of state-specific laws and regulations pertaining to community associations so they can serve their client associations effectively.

To ensure CMCA certificants have the requisite experience and education required in California, NBC-CAM has created additional qualification requirements for California CMCA certificants. All California CMCA certificants must demonstrate they have completed **30 hours** of course-work relating to community association operations which will include the California specific M-100 course offered by CAI and have taken a course in California law that complies with the Manager Certification Act.

For a copy of the California Manager Certification Titling Act, visit [www.nbccam.org/cmca/state.cfm](http://www.nbccam.org/cmca/state.cfm).

California CMCA certificants must submit Part G in addition to the recertification application. CMCA certificants should retain all course information, since some CMCA certificants will be audited.

**COMPUTER-BASED FORMAT**

We've made it easier for busy professionals like you to earn their certification! Simply sign up for the computer-based exam and you can choose from **more exam dates and more locations**, and you'll receive **instant test results**.

**Step-By-Step Instructions:** When you are ready to take the exam, our test officials will put you at ease with step-by-step instructions. It's easy—you'll have your own computer screen and you can answer the exam questions with a simple keystroke or click of the mouse.

**More Exam Dates:** You can take the computer-based CMCA Exam on any day in one of following exam cycles: January/February, April/May, July/August, or October/November.

**More Exam Locations:** The computer-based CMCA examination is offered at more than 800 locations in the U.S. To find the nearest location, go to [www.lasergrade.com](http://www.lasergrade.com) and enter your zip code to see a list of examination sites.

**Instant Test Results:** Immediately after you complete the examination, your test will be scored by LaserGrade Computer Testing, Inc., and you'll be given the results. Established in 1995, LaserGrade is an international, computer-based testing company with proctored testing centers worldwide.

**Cost:** The cost of the computer-based examination is \$300 (standard fee of \$250 plus a \$50 electronic service fee) and covers the application fee, examination, your first year of certification, and quarterly issues of *Upward Directions*, the CMCA e-newsletter.

**PENCIL/PAPER FORMAT**

The pencil/paper format is still available at a variety of exam dates and locations. Simply select your exam date and location from the list attached.

**Exam Dates:** The pencil/paper format exam is normally offered three times per year—in March and September, and on the Wednesday of CAI's National Conference.

**Exam Locations:** The pencil/paper format exam is offered in 40 major U.S. cities (including CAI conferences). Refer to this application for specific locations.

**Test Results:** You will receive your exam results within four to six weeks of taking the exam. Results include a candidate feedback sheet that shows the percentage of items answered correctly. Only pass/fail information is provided.

**Cost:** The cost of the pencil/paper format examination is \$250 and covers the application fee, examination, your first year of certification, and quarterly issues of *Upward Directions*, the CMCA e-newsletter.

Please initial each page before submitting completed application \_\_\_\_\_

## CMCA EXAMINATION DATES AND DEADLINES

### Computer-based format:

- YES! I want to take the CMCA examination in the computer based format in the following examination cycle (choose only one):

| Examination Cycle                                | Application Deadline |
|--|----------------------|
| <input type="checkbox"/> January 1 - February 28 | January 15           |
| <input type="checkbox"/> April 1 - May 30        | April 15             |
| <input type="checkbox"/> July 1 - August 31      | July 15              |
| <input type="checkbox"/> October 1 - November 30 | October 15           |

- I have special needs that require modification of the CMCA Examination (please attach specific details and requirements).

Please visit [www.lasergrade.com](http://www.lasergrade.com) for specific locations for computer-based testing.

Sponsoring organization: National Board of Certification for Community Association Managers

### Pencil/paper format:

- YES! I want to take the CMCA Examination in the pencil/paper format. I've indicated my site preference below:

#### LOCATION:

I want to take the CMCA examination at the following location. Please select 1st and 2nd choice.

- \_\_\_\_\_
- \_\_\_\_\_

#### DATE:

I want to take the CMCA examination on the following dates. Please select 1st and 2nd choice.

- \_\_\_\_\_
- \_\_\_\_\_

- I have special needs that require modification of the CMCA Examination (please attach specific details and requirements).

If travel to location is a hardship, we will try to locate an alternate site.

To qualify for attendance at the CMCA examination, you must submit and receive approval of your CMCA application.

The CMCA Examination (paper/pencil format) will be given on the following dates. Please indicate your preference at left. Please refer to your CMCA Handbook for examination re-scheduling and cancellation policies.

| EXAM DATE                      | APPLICATION DEADLINE |
|--------------------------------|----------------------|
| <b>2010</b> March 5            | February 1           |
| April 28* (Las Vegas, NV only) | April 1              |
| September 10                   | August 1             |
| <b>2011</b> March 4            | February 1           |
| TBD * (TBD)                    | April 1              |
| September 9                    | August 1             |

\*Exam available only at CAI conference location on these dates.

Please be advised there is a possibility that some listed locations may not be available for all of the paper/pencil examinations. NBC-CAM reserves the right to cancel any locations that have two or fewer registered candidates.

#### LOCATIONS

|                                   |                 |                       |
|-----------------------------------|-----------------|-----------------------|
| Phoenix, AZ                       | Chicago, IL     | Columbus, OH          |
| Tucson, AZ                        | Roselle, IL     | Portland, OR          |
| Los Angeles, CA                   | Boston, MA      | Bluebell, PA          |
| San Diego, CA                     | Wellesley, MA   | East Philadelphia, PA |
| San Francisco, CA                 | Baltimore, MD   | Nashville, TN         |
| Denver, CO                        | Ann Arbor, MI   | Austin, TX            |
| Colorado Springs, CO              | Detroit, MI     | Dallas, TX            |
| Hartford, CT                      | St. Louis, MO   | Houston, TX           |
| District of Columbia (metro area) | Kansas City, MO | Falls Church, VA      |
| Ft. Myers, FL                     | Pineville, NC   | Glen Allen, VA        |
| Miami, FL                         | Raleigh, NC     | Virginia Beach, VA    |
| Orlando, FL                       | Princeton, NJ   | Kirkland, WA          |
| Atlanta, GA                       | Las Vegas, NV   | Milwaukee, WI         |
| Honolulu, HI                      | Reno, NV        |                       |
|                                   | Cincinnati, OH  |                       |

Please initial each page before submitting completed application \_\_\_\_\_

**PAYMENT METHOD**

- Computer-Based Format: \$300
- Paper/Pencil Format: \$250
  
- Check enclosed made payable to NBC-CAM
- Visa    Master Card    American Express    Discover

Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Name on Card: \_\_\_\_\_

Signature: \_\_\_\_\_

Before sending in this application, please be sure you have included the following information.

Did You:

- Complete question seven or eight on page two?
- Sign pages three and four?
- Include a copy of your prerequisite course certificate or experience requirement?
- Include your payment?

Receipt of your application will be acknowledged within three weeks.

**NBC-CAM**

National Board of Certification  
for Community Association Managers

Please initial each page before submitting completed application \_\_\_\_\_

## EXPERIENCE REQUIREMENT

To qualify for the one-time education requirement waiver, a professional must have at least five years experience as a community association manager. The experience must be as a community association manager (or similar title). The experience pathway is a one-time waiver. If you do not pass the CMCA examination, you must take a prerequisite education course prior to retaking the examination. Please list the relevant experience below (use additional pages as needed):

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|                                       |                  |
|---------------------------------------|------------------|
| Community Association or Organization | City, State, Zip |
|---------------------------------------|------------------|

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|           |                     |
|-----------|---------------------|
| Job Title | Dates of Employment |
|-----------|---------------------|

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Description of Responsibilities

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|                    |                              |
|--------------------|------------------------------|
| Name of Supervisor | E-mail Address of Supervisor |
|--------------------|------------------------------|

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|                                       |                  |
|---------------------------------------|------------------|
| Community Association or Organization | City, State, Zip |
|---------------------------------------|------------------|

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|           |                     |
|-----------|---------------------|
| Job Title | Dates of Employment |
|-----------|---------------------|

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Description of Responsibilities

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|                    |                              |
|--------------------|------------------------------|
| Name of Supervisor | E-mail Address of Supervisor |
|--------------------|------------------------------|

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|                                       |                  |
|---------------------------------------|------------------|
| Community Association or Organization | City, State, Zip |
|---------------------------------------|------------------|

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|           |                     |
|-----------|---------------------|
| Job Title | Dates of Employment |
|-----------|---------------------|

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Description of Responsibilities

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|                    |                              |
|--------------------|------------------------------|
| Name of Supervisor | E-mail Address of Supervisor |
|--------------------|------------------------------|

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|                                       |                  |
|---------------------------------------|------------------|
| Community Association or Organization | City, State, Zip |
|---------------------------------------|------------------|

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|           |                     |
|-----------|---------------------|
| Job Title | Dates of Employment |
|-----------|---------------------|

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Description of Responsibilities

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|                    |                              |
|--------------------|------------------------------|
| Name of Supervisor | E-mail Address of Supervisor |
|--------------------|------------------------------|

Please initial each page before submitting completed application \_\_\_\_\_

# NBC-CAM

National Board of Certification  
for Community Association Managers

## Change of Address

NBC-CAM uses home addresses to correspond with its candidates and certificants. If you change your address you must notify NBC-CAM as soon as possible. Failure to do so may cause you to miss important updates on the CMCA program that could affect your certification. Changes of address should be sent to NBC-CAM. They must be in writing, but can be sent via letter, fax or e-mail.

If a CMCA certificant moves to or begins practicing in a state that has additional requirements not previously met, those requirements must be met prior to any use of the certification in that state.

Date Submitted: \_\_\_\_\_

Name: \_\_\_\_\_

### 1. Please enter the old information:

Home Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_ Web \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_ Web \_\_\_\_\_

### 2. Please enter the new information:

Name \_\_\_\_\_

Home Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_ Web \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail \_\_\_\_\_ Web \_\_\_\_\_

## Change of Address – Page 2

3. Please indicate when this change should be effective.

Temporary      From: \_\_\_\_\_ To: \_\_\_\_\_ (Effective Dates)

Permanent      Effective Date: \_\_\_\_\_

4. Signature \_\_\_\_\_ Date: \_\_\_\_\_

5. Please mail/fax or email the form to:      **NBC-CAM**

Attn: CMCA Address Change  
225 Reinekers Lane, Ste 310  
Alexandria, VA 22314  
Fax: 703-684-1581

# NBC-CAM

National Board of Certification  
for Community Association Manage

225 Reinekers Lane ■ Suite 310 ■ Alexandria, VA 22314 ■ Phone: 703.836.6902 ■ Fax: 703.684.1581 ■ [www.nbccam.org](http://www.nbccam.org)