

Experience and Reputation of Community Manager Worksheet
Community Association Directors & Officers Liability Policy Underwriting

The following items indicate qualifications, education, experience, training and certifications for community managers. Managers with demonstrated experience, education and training help to minimize the likelihood of claims against a board, an association and the managers.

1. If the association is in a state with manager licensing requirements are all managers working for the association currently licensed and in good standing? Yes No
2. Does the association have a written agreement with the management company? Yes No
3. Has the management company completed background and criminal checks on all employees working for the association? Yes No
4. Does the written management agreement have a mutual indemnification provision? Yes No
5. Does the independent management company have professional liability Insurance? Yes No
6. Does the individual manager have more than five year's of management experience? Yes No
7. Is the manager a member of the CAI? Yes No
8. Does the manager attend CAI or other community management educational events or seminars? Yes No
9. Does the individual professional manager(s) retained by the association have any of the following certifications conferred by the Community Association Institute ("CAI"):
 - a. Association Management Specialist (AMS) Yes No
 - b. Professional Community Association Manager (PCAM)? Yes No
 - c. Large Scale Manager (LCM) Yes No
10. If the association has an independent management company, does the management company have the Accredited Association Management Company (AAMC) certification conferred by the Community Association Institute? Yes No
11. Does the individual professional manager(s) retained by the association have any certifications or designations conferred by any other community manager professional organizations such as the California Association of Community Managers or the Arizona Association of Community Managers:
 - a. Organization: _____ Designation _____
 - b. Organization: _____ Designation _____
12. If the association has an independent management company, does the management Company have have any certifications or designations conferred by any other community manager professional organizations such as the California Association of Community Managers or the Arizona Association of Community Managers:
 - a. Organization: _____ Designation _____

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