

PENNSYLVANIA AND
DELAWARE VALLEY CHAPTER



Address: 3000 Valley Forge Circle, Suite G-14
King of Prussia, PA 19406
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Gold Star Community® Recognition - Pre-Transition Community Application

SUBMISSION CRITERIA

- DEADLINES: There are two application periods each year. January 1-March 1; August 1-October 1. Applications submitted outside of these periods may be held for review until the next period.
- CAI membership is not a requirement.
- All applications must be submitted on the forms provided with required attachments.
- Applicants may be asked to supply additional supporting documentation.
- The Gold Star Community® rating is renewable every three (3) years.
- The application and attachments must be submitted to:
Pennsylvania and Delaware Valley Chapter, CAI
3000 W. Valley Forge Circle, Suite G-14
King of Prussia, PA 19406

An independent review panel, comprised of an attorney, insurance agent, an elected association officer, a certified public accountant and a contractor, will review applications. If an applying association does not qualify upon first submission, the association will be advised as to what area(s) need improvement. Associations may respond within 90 days at no additional charge. If no response is received within 90 days, the applicant may resubmit a new application with appropriate fee.

Communities who are awarded the Gold Star rating will receive an outdoor sign, a certificate suitable for framing and Gold Star Community stickers for use on their association letterhead. Each association approved as a Gold Star Community will be recognized for their achievement by the CAI.

DISCLAIMER

The Gold Star Community® Program indicates to professionals, vendors, and existing and prospective homebuyers that the community follows basic and open policies and procedures. Associations participating in this or any other program sponsored by the chapter remains responsible for their own liability and the liability of their volunteers, officers, and employees. In determining that a community qualifies for the Gold Star rating, the chapter evaluates procedures and practices of the association for general conformance with industry standards based upon answers in a questionnaire developed by the chapter and certain supporting documentation. The chapter does not have the resources to investigate the accuracy of information supplied by the association and does not do so. No one is entitled to rely on the Gold Star Community program as an indicator of the fiscal soundness or proper operation of the association or for any other purpose.

Gold Star Application

Complete name of association: _____

Township and County: _____

Street address: _____

City: _____

State: _____

Zip Code: _____

Contact Person: _____

Street Address: _____

City: _____

State: _____

Zip Code: _____

Phone: _____

Fax: _____

Email address: _____

Type of Community: Condo: PUD: Residential: Commercial:
(Check all that apply)

Managed by: Volunteers Assoc. Staff Mgmt Firm Developer

Pennsylvania and Delaware Valley Chapter, Community Associations Institute
Gold Star Community[®] Program Application

Gold Star Application

Your Community	Single Family Detached		Townhouses # of Units		2-5 Stories # of Units		Over 5 stories # of Units		Total
Number of homes:									
Existing:		+		+		+		=	
Maximum:		+		+		+		=	
							Total Units:		

Application Fees

Each application and Gold Star rating is valid for a period of three years and must be renewed every three years. Please send in the appropriate fee according to the chart below, and make checks payable to PADVC, CAI.

Community Size	CAI Member Fee	Non-Member Fee	Package Price*
Small (1-149 units)	\$75.00	\$100	\$135
Medium (150-499 units)	\$100.00	\$125	\$150
Large (500+ units)	\$125.00	\$150	\$170

*Includes one individual membership for the president or main contact for your community association. This is a discount of at least 25% on membership plus gold star application fee.

Please include with this application - one copy of each of the following (application will not be accepted without the following documents):

- Insurance requirement from the association's governing documents
- Capital budget
- Operating budget
- D&O Insurance Certificate
- Component/Funding Schedules from most recent reserve study
- Most recently audited/reviewed financial statements

Qualifying Section

General Characteristics

1. Minutes are kept for Owners meetings. Yes No
2. Minutes are kept for Board/Trustee meetings. Yes No
3. The association prepares an annual budget in accordance with governing documents. Yes No
4. The association has annual membership meetings in accordance with governing documents. Yes No
5. There is an opportunity for owner input before or during meetings. Yes No
6. The association will hold an annual election of officers after transition as required by the documents. Yes No
7. Before each board meeting, board members receive an agenda, minutes of the previous meeting, financials and other appropriate reports. Yes No
8. Board meetings may be attended by owners, except when the Board meets in executive session. Yes No
9. The association has \$ _____ of General Liability Insurance. Yes No
(Please attach copy of insurance certificate)
10. This amount meets or exceeds the minimum amount stated in documents. Yes No
11. The association has \$ _____ of D & O Liability Insurance. Yes No
12. This amount meets or exceeds the minimum amount stated in documents. Yes No

Qualifying Section, Cont.

General Characteristics

13. The association maintains a Book of Resolutions and is current. Yes No
14. Resolutions are incorporated within meeting minutes. Yes No
15. The association provides information kits to new owners as required by law. Yes No
16. The board provides information kits to new board members. Yes No
17. Contracts are competitively bid as a general procedure. Yes No
18. Contractors are required to present a current copy of their certificate of insurance before commencement of work. Yes No
19. The association has active committees that provide reports to the board. Yes No
20. The community association has adopted CAI's Rights and Responsibilities. Yes No
(A "no" answer on this question will not cause the community to fail to achieve Gold Star status.)

Financial

1. The association has adopted an annual budget and, at least 30 days prior to implementation, has provided a written copy to all owners. Yes No
2. **A.** Has the association received any of the following documents from an Auditor: 1) SAS 112 Letter; 2) Management Recommendation Letter; 3) Clients Advisory Comments Letter. (Please provide copies) Yes No
- B.** If yes, has your community taken any steps to address any internal control weaknesses as noted by the auditor? Note: Any internal control weakness may cause the community to fail this application. Yes No
3. The association has a fidelity bond for persons handling association funds. Yes No
4. The association has performed or updated a Reserve Study in the past three years. Yes No
5. The association is funding reserves as detailed in the Reserve Study. Yes No
6. The total amount currently in the association's reserves is \$_____.
7. The association has had a non-weather related special assessment in the past three years. (If yes, please list amount of assessment \$_____.) Yes No
8. If yes, please note the age of the community and reason for assessment.
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9. The association contracts for audit or accounting services in accordance with the governing documents. Yes No

Please check which services are required by the governing documents:

Audit Review Compilation Other. Please specify: _____ (Please provide copies)

10. As of _____ there are _____ more than sixty days overdue with assessments.
(date) (# of owners)
Total overdue assessments from above is \$_____.
11. How many signatures are required on association checks? _____

Qualifying Section, Cont.

Rules Enforcement, Architectural Control, and Communication

1. The association has written rules other than those contained in the Declaration and By-laws. Yes No N/A
2. The association has written architectural control guidelines. Yes No N/A
3. The association has written policies for handling rules enforcement. Yes No N/A
4. The association affords alleged violators an opportunity for due process. Yes No N/A
5. The association informs owners of rules and rule revisions by the following methods:
 Resale Packages Welcome Packets Meetings Meeting Minutes Newsletters Website Auto phone/text message system Other
6. The association informs non-owner occupants of rules and rule revisions by the following methods:
 Resale Packages Welcome Packets Meetings Meeting Minutes Newsletters Website Auto phone/text message system Other

Questions 7 and 8 attempt to identify special programs or services which the association offers to improve the quality of life in the association, and/or make your community stand apart and worthy of the Gold Star award. *If not applicable, please explain. Responses are required for Questions 7 and 8.*

7. Please describe what special educational, environmental, recreational, social, and/or special events/programs the association sponsors. Attach additional pages if necessary.

8. Please describe what special community services such as transportation, town watch, in-unit repairs, security, etc., the association provides. Attach additional pages if necessary.

Verification

The information submitted on this application has been reviewed and verified by an elected officer of the association, whose signature appears below:

Name Signature

Elected office held Date of Application

This application was prepared by:

Name

Title Phone