

**Application for CMCA®**

**Prerequisite Course Status**

# Introduction

The Certified Manager of Community Associations® (CMCA®) is the only international certification program designed exclusively for community association managers. Since 1996, the Community Association Managers International Certification Board (CAMICB), formerly NBC‐CAM, has certified more than 20,000 community managers.

CAMICB designed the CMCA certification to recognize professionals who have demonstrated the fundamental knowledge and expertise to manage community associations effectively. In addition to establishing acceptable standards of knowledge and skills for the community management industry, the CMCA provides association homeowners with confidence regarding a certified manager’s capabilities and raises the professional status of community association management.

Applicants for the CMCA credential may establish their eligibility by completing a CAMICB‐approved prerequisite course that offers a comprehensive overview of the foundational principles of community association management.

Organizations that seek CMCA prerequisite status for their course must complete this application to demonstrate compliance with CAMICB’s ten requirements for CMCA prerequisite course status.

Approved CMCA prerequisite courses benefit from increased visibility and credibility in the community association management industry. This recognition attracts a broad audience of potential learners and signifies a commitment to high-quality education aligned with industry standards.

## Requirements for Approval

CAMICB’s requirements outline the essential standards that course providers must meet to be approved as a prerequisite for the CMCA. These standards ensure that approved educational programs meet the highest level of quality and align with the professional development needs of CMCA candidates:

1. The Course Provider: Clear, mission-aligned systems for managing educational courses.
2. Administration: Effective procedures for maintaining and enhancing course quality.
3. Transparency in Course Delivery and Marketing: Maintenance of educational focus.
4. Maintenance of Learner Records: Robust systems for verifying and protecting learner records.
5. Learning Outcomes: Clear, measurable learning outcomes reflecting course goals.
6. Developers and Instructors: Qualified instructors committed to high-quality education.
7. Learning Environment and Support: Inclusive and conducive learning environments.
8. Requirements for Completion: Criteria for satisfactory course completion and assessments.
9. Course Evaluation: Regular course evaluations and incorporation of feedback.
10. Course Content Alignment: Subject matter that is aligned with the CMCA content outline.

These requirements are designed to be comprehensive and practical, allowing providers to meet them effectively while maintaining the flexibility to innovate. The application process is an integral part of ensuring that providers not only comply with these standards but also create educational experiences that are engaging, effective, and beneficial for learners who are early in their community association management career.

By adhering to these guidelines and completing the application process, course providers join CAMICB in our commitment to excellence and continuous improvement in supporting the community association management industry.

# Application Process

A course provider seeking CMCA prerequisite status must complete this application to demonstrate compliance with CAMICB’s requirements.

For each of the ten requirements outlined above, the course provider must demonstrate compliance by providing written responses or submitting exhibits where necessary. All exhibits should be clearly named. CAMICB staff will provide the applicant with access to a secure file share. All submitted materials will be treated securely and confidentially and used only to determine eligibility for the prerequisite course status.

Upon receipt, the CAMICB staff will conduct a preliminary review to verify adherence to required practices and the submission of required documentation. If necessary, staff will request additional information and/or documentation from the provider, designating a timeframe for submission. The provider must respond within the designated timeframe to avoid delay or withdrawal of the application.

Following the initial review, CAMICB’s Prerequisite Education Committee, composed of subject matter experts from the community association management field, will use the submitted documentation to evaluate the course’s alignment with the CMCA content outline. The Committee will assess the degree to which the course addresses the topics covered on the CMCA exam, ensuring approved courses sufficiently prepare candidates for the CMCA examination. The assessment uses the Rubric for CMCA Course Alignment, included as an appendix at the end of this application. Refer to the Rubric for further details on the alignment specifications and review process. If misalignments are identified, the provider will be given detailed feedback and clear timelines for making necessary adjustments and seeking reevaluation.

Upon meeting all approval criteria, CAMICB will grant an Approval Certificate to the course provider. The certificate outlines the course’s compliance, the provider’s details, and the approval validity period. With this approval, the provider is granted the privilege to use the CAMICB and CMCA symbols, signifying their course’s compliance with the high standards set forth by CAMICB.

# Withdrawal or Suspension of Approval

The course provider may voluntarily withdraw their course approval at any time. Additionally, CAMICB reserves the right to withdraw or suspend a course’s approval under certain circumstances, including insolvency, evidence of noncompliance with CAMICB standards, or fraudulent behavior.

Providers will receive written notification and have 30 days to respond with evidence or request a hearing. A review committee will investigate and decide, which will be communicated in writing. Providers can appeal the decision within 30 days to an independent appeal committee, which will review and issue a final decision within 60 days. All steps and communications will be documented to ensure transparency and fairness.

Upon suspension or withdrawal, the provider must cease using the CMCA symbol and referencing their course as a CAMICB-approved prerequisite. The provider must return any approval documents to CAMICB as requested.

# Reapproval Process

To ensure ongoing relevance and compliance, approved courses must undergo scheduled reevaluation following the completion of the CMCA job analysis, which CAMICB performs approximately every five years. CAMICB will notify providers well in advance of the scheduled reevaluation period. Providers will be notified if delays in the job analysis cycle result in postponement or extension of the reevaluation period. CAMICB may also initiate an ad hoc reevaluation of the course outside of the usual five-year cycle in the event of non-compliance or significant changes in the organizational structure or purpose of the course provider.

# Application Details

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| Organization Information | | | | | | |
| Name of Organization: | | | | | Click or tap here to enter text. | |
| Entity Type (e.g., nonprofit, for-profit, educational institution, etc.): | | | | | | Click or tap here to enter text. |
| Street Address: | | | Click or tap here to enter text. | | | |
| City: | Click or tap here to enter text. | | | | | |
| Country: | | Click or tap here to enter text. | | | | |
| Zip/Postal Code: | | | | Click or tap here to enter text. | | |

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| Application Contact Information | | | |
| Contact Name: | | Click or tap here to enter text. | |
| Contact Email: | Click or tap here to enter text. | | |
| Contract Phone: | | | Click or tap here to enter text. |

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| Course Information | | | |
| Course Name: | Click or tap here to enter text. | | |
| Primary Delivery Methods (e.g., in-person, online, hybrid): | | Click or tap here to enter text. | |
| Assessment Method (e.g., written exam, oral exam, written report): | | | Click or tap here to enter text. |

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| Additional Information | |
| Does your organization have affiliations or partnerships that influence the course content or delivery? If yes, please describe. | Click or tap here to enter text. |
| Is there any other information you believe is relevant to this application? | Click or tap here to enter text. |

# Requirement 1: The Course Provider

The course provider must have a transparent system or structure for managing their educational courses. This system should align with and support the provider’s overall mission.

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| 1.1 | The provider must demonstrate a clear system for managing educational programs through a designated unit or an integrated approach within its broader organizational framework. |
| 1.2 | Educational activities must support and be consistent with the organization’s mission and objectives. |

*Describe your organizational structure or system for managing and delivering educational programs. You may include relevant supporting documents such as the organization’s mission statement, organizational charts, process flow diagrams, or integrated approach descriptions.*

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| 1.3 | The provider must demonstrate a stable and enduring presence committed to providing educational services. |
| 1.4 | The provider must ensure that adequate resources are available for delivering high-quality educational programs, regardless of the size of the dedicated educational team. |
| 1.5 | The provider and its staff must uphold high standards of professionalism and ethics in all educational endeavors. |

*Describe your organization’s history and commitment to providing educational services.*Click or tap here to enter text.

*How does your organization uphold high standards of professionalism and ethics in all educational endeavors? You may include examples such as your code of conduct, training programs on ethical practices, and grievance and dispute resolution policies.*

Click or tap here to enter text.

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| 1.6 | The provider must have transparent policies regarding fee refunds and complaint resolution, which should be readily accessible to learners. |
| 1.7 | The provider must have established policies to appropriately manage and respect intellectual property rights in educational content and delivery. |

*Describe your organization’s policies regarding fee refunds, complaint resolution, and intellectual property rights management. How are these policies communicated to learners?*

Click or tap here to enter text.

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| 1.8 | In collaborative course offerings, the primary provider applying for CAMICB approval must ensure adherence to CAMICB standards and actively participate in all facets of the course. |

*Is this course offered in collaboration with another provider? If yes, how does the primary provider ensure adherence to CAMICB standards and active participation in all facets of the course?*Click or tap here to enter text.

# Requirement 2: Administration

The provider must have established quality assurance procedures that ensure compliance with CAMICB’s standards. These procedures are crucial for maintaining high-quality courses and facilitating continuous improvement.

The provider must appoint qualified professionals to manage and coordinate the course schedule effectively. The provider should designate a primary contact between the provider organization and CAMICB. This individual is tasked with ensuring that all CAMICB-required practices are met consistently.

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| 2.1 | The provider must have internal policies establishing a quality assurance process for the administration of educational programs. An individual or team with adequate knowledge of educational quality assurance should oversee this process. |
| 2.2 | The individual or team responsible for quality assurance should have relevant expertise in educational administration, community association management, or a related field. If specific expertise in community association management is lacking, the provider should involve a consultant or expert in community association management to participate in course planning, implementation, and evaluation. |

*Who is responsible for overseeing the quality assurance process? Provide details about their qualifications, particularly concerning educational administration, community association management, or related fields. If your organization lacks specific expertise in community association management, explain how you involve a consultant or expert in this area in course planning, implementation, and evaluation.*Click or tap here to enter text.

# Requirement 3: Transparency in Course Delivery and Marketing

The course’s primary focus must be professional education in community association management. The course must not be a platform for promoting specific products or services. Providers must establish and maintain a transparent process for disclosing and managing conflicts of interest, including handling and disclosing financial or in-kind resources. This process is vital for preserving the integrity of the course content and presentation.

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| 3.1 | The course must focus on professional practice and not promote specific products or services. |
| 3.2 | The provider must manage promotions and advertisements to ensure they are appropriate and maintain the educational focus. |

*Does the course promote specific products or services? If so, please explain how you manage and differentiate any promotional or advertising content to maintain the educational integrity of the course.*

Click or tap here to enter text.

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| 3.3 | The provider must have a process to identify, manage, and disclose conflicts of interest. |

*What is the process for identifying, managing, and disclosing any conflicts of interest related to your course?*Click or tap here to enter text.

# Requirement 4: Maintenance of Learner Records

The provider must implement a comprehensive system that identifies and reports on learners who have satisfactorily completed the course. This system should encompass the tracking and monitoring of attendance. Learner records must be preserved for a minimum of seven years, with adequate provisions for backup to ensure accessibility in case of any damage or inaccuracies in the original documentation. The integrity and privacy of these records are of paramount importance.

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| 4.1 | The provider must have a systematic process for verifying attendance, identifying individuals who complete a course, and tracking these records. This includes maintaining learner records for at least seven years following course completion. |

*Describe your system for verifying attendance and identifying individuals who complete a course. How do you track and monitor these records? You may use examples or excerpts from your record-keeping system.*

Click or tap here to enter text.

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| 4.2 | The provider must ensure the privacy and security of learners’ records, with systems in place to protect sensitive information. |

*Describe the measures and technologies used to protect learner records.*

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| 4.3 | The provider must implement a system that allows CAMICB to verify learners’ course completion efficiently. |

*Explain the system your organization has in place that allows CAMICB to verify learners’ course completion efficiently.*Click or tap here to enter text.

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| Additional Effective PracticesWhile not required, providers are encouraged to adopt these practices beyond CAMICB’s standards to enhance program quality. |
| * + - Retain additional learner details, such as a current address, telephone number, and assessment scores, as part of the provider’s records. |

# Requirement 5: Learning Outcomes

The provider is required to develop clear learning outcomes that are directly informed by the needs of the community association management profession. These outcomes should define the specific knowledge, skills, or abilities learners are expected to acquire through the course.

These learning outcomes must be communicated effectively to learners. The aim is to ensure that learners are fully aware of what they should expect to learn and how it will contribute to their professional development in community association management.

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| 5.1 | The provider must establish learning outcomes that are clear, concise, measurable, focused on the learner’s performance, and based on identified needs. |

*Describe the process to establish clear, concise, and measurable learning outcomes for your course.*

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| 5.2 | The provider should ensure the number of learning outcomes is reasonable and aligns with the course’s scope. |

*How many learning outcomes have you established for your course? Please explain how you determined the number to be reasonable.*

Click or tap here to enter text.

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| 5.3 | Criteria for successful completion must be compatible with the learning outcomes. |
| 5.4 | The outcomes should be clearly communicated to learners. |

*What are the criteria for successful completion of the course?*Click or tap here to enter text.

*How does your organization communicate its learning outcomes to learners? You may provide the course description and samples of course materials that highlight and discuss these outcomes.*  
Click or tap here to enter text.

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| Additional Effective PracticesWhile not required, providers are encouraged to adopt practices beyond CAMICB’s standards to enhance program quality. |
| * + - The provider uses learning outcomes as an outline for curriculum development, providing a structured approach to course design. |

# Requirement 6: Developers and Instructors

The provider must ensure qualified individuals are selected to determine the course’s purpose, develop intended learning outcomes, and conduct each course.

The quality of a course and its value to the learner rests on the developers’ and instructors’ competence in community association management, understanding of the learning outcomes, knowledge of instructional methodologies, and ability to facilitate learning. The developers and instructors are responsible for ensuring that the learning experience results in the intended learning outcomes.

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| 6.1 | The provider must employ qualified course developers and instructors. Developers should have expertise in instructional methodologies and learning processes, while instructors should be able to communicate with learners effectively. |

*Describe the qualifications and experience of your course developers and instructors.*

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| 6.2 | Developers and instructors must demonstrate high standards of professional conduct and adhere to non-discrimination policies, ensuring equal treatment of all participants regardless of gender, age, socioeconomic or ethnic background, sexual orientation, or disability. |

*How does your organization ensure high standards of professional conduct and adherence to non-discrimination by your developers and instructors? This may include a list of policies and practices you have in place.*

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| 6.3 | Instructors should consistently meet learning outcomes and receive regular feedback on their performance. |

*What system do you have in place for providing regular feedback to instructors on their performance?*   
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| Additional Effective PracticesWhile not required, providers are encouraged to adopt these practices beyond CAMICB’s standards to enhance program quality. |
| * + - The provider offers educational process training to instructors.     - The provider ensures a balance between program content and educational methodologies.     - The provider involves a team in course development, including program development experts and content experts. |

# Requirement 7: Learning Environment and Support

The provider must ensure that the learning environment is consistent with the course’s objectives and conducive to achieving the intended learning outcomes. This commitment extends to all aspects of the learning experience, including the physical or virtual course setting and the resources used.

All reference materials, resources, and instructional aids must be carefully selected to align with the course’s purpose. In designing and utilizing physical facilities, attention should be paid to elements such as lighting, sound, seating arrangements, and visual aids to eliminate any barriers to learning.

The provider should actively seek innovative ways to support learners. This includes ensuring accessibility and engagement, regardless of the learning environment.

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| 7.1 | The learning environment and resources, including facilities and materials, must be appropriate to the content and method of course delivery and enhance learning consistent with the organization’s mission and the course’s learning outcomes. |

*Describe your learning environment and resources, including facilities and materials.*

Click or tap here to enter text.

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| 7.2 | Facilities, learning experiences, and resource materials must be accessible to all individuals, including those with disabilities. |

*What measures are in place to ensure that your educational facilities, learning experiences, and resource materials are accessible to all individuals, including those with disabilities?*  
Click or tap here to enter text.

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| Additional Effective PracticesWhile not required, providers are encouraged to adopt these practices beyond CAMICB’s standards to enhance program quality. |
| * + - The learning environment accommodates varied instructional techniques like small-group discussion, experiential learning, and interactive learning.     - The learning environment enhances learning by replicating workplace conditions for applying new knowledge and skills.     - Learners can access resources like job aids, software, and subject matter experts. |

# Requirement 8: Requirements for Completion

The provider is responsible for establishing clear and comprehensive requirements for satisfactory course completion, including some form of learning assessment aligned with the intended learning outcomes. The assessment may take various forms, such as a written or oral examination, question-and-answer session, written report, or completion of a project. Learners must be informed of these completion requirements and assessment methods at the beginning of the course. This ensures transparency, prepares learners for what will be required to pass the course, and establishes CMCA eligibility.

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| 8.1 | The provider must establish clear requirements for satisfactory completion, including some form of learning assessment, and communicate these to learners before the course begins. |

*How are the requirements for satisfactory course completion, including learning assessment procedures, communicated to learners? Provide examples of the materials or methods used to inform learners about these requirements.*

Click or tap here to enter text.

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| 8.2 | Learning assessments must measure the learner’s achievement of the intended learning outcomes. |

*What types of assessment are used to measure the learner’s progress (e.g., quizzes, assignments, exams) and what scoring guides are used in grading the assessments?*

Click or tap here to enter text.

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| 8.3 | The provider must notify learners whether they have met the requirements for satisfactory completion. |

*How are learners notified of their completion status? Provide sample notices of successful completion and unsuccessful completion.*

Click or tap here to enter text.

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| Additional Effective PracticesWhile not required, providers are encouraged to adopt these practices beyond CAMICB’s standards to enhance program quality. |
| * + - Providers are encouraged to use varied learning assessment methods and provide detailed results reporting to enhance learner engagement and understanding. Methods of verifying satisfactory completion should be well-defined and executed effectively. |

# Requirement 9: Course Evaluation

The provider must have a process for evaluating all course planning and delivery aspects. This process is a critical tool for continuous improvement. The evaluation should cover logistical and instructional planning, instructor selection and preparation, course implementation, and achievement of intended learning outcomes.

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| 9.1 | The provider must have a process for evaluating the course. Evaluation procedures should review course planning and delivery processes, logistical and instructional planning, instructor selection and preparation, course implementation, and achievement of intended learning outcomes. |

*Describe your established course evaluation procedures.*

Click or tap here to enter text.

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| 9.2 | Course evaluation results should be continuously incorporated into program improvements. |

*How do you incorporate the results of course evaluations into program improvements?*Click or tap here to enter text.

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| Additional Effective PracticesWhile not required, providers are encouraged to adopt these practices beyond CAMICB’s standards to enhance program quality. |
| * + - The provider uses a tracking system incorporating past evaluations to monitor program improvements.     - A substantial commitment to the process of evaluation is evident. The provider uses varied evaluation techniques. |

# Requirement 10: Course Content Alignment

The course curriculum must be designed to provide a comprehensive overview of the essential knowledge and skills required for professional community association managers. The curriculum must align with the knowledge domains of the CMCA exam: Contracting, Financial Management, Governance and Compliance, Meetings and Events, Property Maintenance, and Risk Management. This alignment ensures that the course content remains relevant and effectively prepares candidates for the CMCA examination. Providers must provide a copy of the participant course materials, a course outline, and a complete description of how the course effectively covers the exam’s knowledge domains.

This requirement is assessed using the Rubric for CMCA Course Alignment, which is included as an appendix at the end of this application. The Rubric provides further details on the alignment specifications and review process.

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| 10.1 | The course content must align with the CMCA content outline. |

*Please submit course materials as exhibits. Copies of the participant course materials, outline, and description of how the course effectively covers the knowledge domains must be submitted. Participant course materials include handbooks, worksheets, and presentation slides. Providers are encouraged to submit additional materials demonstrating the course’s content (e.g., assessment form, reading materials, resource lists, etc.).*

Appendix: Rubric for CMCA Course Alignment

A course approved for CMCA prerequisite status must align with the CMCA content outline.

The content outline reflects the fundamental knowledge that early-career community association managers need to possess and the tasks they are expected to execute proficiently. It serves as a roadmap for the subjects that must be covered in a CAMICB-approved prerequisite course.

The content outline includes six knowledge domains that represent the primary aspects of a community association manager's role: Governance & Compliance, Financial Management, Meetings & Events, Risk Management, Property Maintenance, and Contracting. The full content outline is included for review at the end of this document.

The content outline is updated approximately every five years based on the findings of a job analysis study. Courses submitted for prerequisite status will be evaluated against the 2024 content outline. Learn more about the job analysis and the 2024 updates to the content outline [here](https://www.camicb.org/for-cmcas/job-analysis).

# Course Assessment Criteria

The course provider must demonstrate that the course aligns with the CMCA content outline. *Alignment* means that there is enough agreement between the course and exam content that a student who completes the course will be adequately prepared to demonstrate proficiency in the subject matter assessed by the CMCA exam.

Course alignment is evaluated by CAMICB’s Prerequisite Education Committee, a panel of 3-5 volunteer subject matter experts from the community association management field. Assessors review the submitted course materials and assign scores. The course is assessed based on two criteria.

* **The Domain-Level Score** assesses how well the course covers each individual knowledge domain. Assessors assign each domain a score of 0-4, with 0 indicating that none of the domain content is covered in the course and 4 indicating that the content is covered extensively.
  + The course must score at least a 1 in each domain, meaning that each domain receives at least minimal coverage. This ensures that candidates receive exposure to all basic concepts, allowing them to build upon this foundation through independent study.
* **The Overall Course Score** is a comprehensive measure of the alignment between the course and the CMCA content outline, calculated by averaging the scores assigned to the six domains.
  + The overall minimum requirement is an average score of 2. By averaging the scores of individual domains to determine the overall course score, variations in coverage across different domains are accounted for. While some domains may have higher coverage than others, achieving an overall average score of 2 indicates that the course provides a breadth of content that serves as a baseline level of preparation for the exam.

Assessors may also provide optional written feedback to recommend improvements or suggest areas where greater alignment would be beneficial. The written feedback is for the provider’s benefit and is not used to make an eligibility decision about the course.

Prerequisite courses are not required to cover every detail of the CMCA content outline. Candidates are expected to supplement their exam preparation with additional resources outside of the prerequisite course. As such, the prerequisite course is only required to provide a baseline level of knowledge that the candidate can build upon independently.

Course providers are encouraged to structure and present their content as they see fit, so long as they adequately cover the topics that CAMICB has determined to be fundamental to the success of early-career managers.

# Assessment Rubric for Course Alignment

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| **Score** | **Description** | **Implication** |
| **0** | *No Coverage:* The content of this domain is not covered in the course at all. There is no mention or reference to any topics or concepts within the domain. No course materials are related to this domain. | Significant gap in coverage for the domain. Learners will lack fundamental knowledge in this area. |
| **1** | *Minimal Coverage:* The content of this domain is covered minimally in the course. Select topics within the domain are limitedly mentioned or covered. Course resources or materials offer limited coverage related to this domain. | Partial understanding of the domain. Learners may struggle with related questions on the exam without further independent preparation. |
| **2** | *Basic Coverage:* The course covers basic aspects of this domain. It includes basic explanations or introductions to key topics within the domain. Some relevant resources or materials are provided. | Adequate understanding of fundamental concepts within the domain, though additional study or resources may be required for a deeper understanding. |
| **3** | *Moderate Coverage:* The course provides moderate content domain coverage, adequately covering most key topics. It provides adequate explanations and discussions of key topics within the domain. Relevant and varied resources or materials are provided. | Good understanding of most concepts within the domain. Learners should be adequately prepared for related questions on the exam. |
| **4** | *Extensive Coverage:* The course extensively covers this content domain, providing thorough and comprehensive coverage. It provides detailed explanations and analyses of all key topics within the domain. Abundant and diverse resources or materials cover various aspects of the domain. | Excellent understanding of all concepts within the domain. Learners are well-prepared to answer questions on the exam and apply their knowledge effectively. |

# CMCA Exam Content Outline

The full content outline is included below for reference. It comprises six knowledge domains. Each domain includes a written summary, as well as knowledge statements and task statements. Knowledge statements represent the fundamental concepts that CMCA candidates should understand. Task statements outline the duties a candidate should be able to perform, representing the practical application of the knowledge statements. Tasks are further categorized into sub-domains, providing a detailed breakdown of specific job functions within each broader domain.

When assigning a Domain-Level Score, assessors consider alignment with all aspects of the domain, including the summary, knowledge statements, and task statements.

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| **GOVERNANCE AND COMPLIANCE (23%)** |
| An association manager must demonstrate competence in the administration of organizational accountability, decision transparency, and legal accountability, including policy development, rule enforcement, communication, and delineation of roles and responsibilities, to (a) ensure the association is in compliance with all governing documents and legal requirements, (b) ensure rules and policies are applied in a fair and consistent manner, (c) cultivate and promote a positive and peaceful community environment, and (d) ensure the board, association members, and other parties have a clear understanding of the governing documents, relevant laws, and when to seek legal clarification or interpretation. |
| **KNOWLEDGE STATEMENTS** |
| Knowledge of the procedures for managing unrecoverable debts |
| Knowledge of the purposes and components of disclosure statements |
| Knowledge of the principles of assessment/debt collection |
| Knowledge of the principles and components of collection policies |
| Knowledge of the types and purposes of community association governing documents |
| Knowledge of due process principles and procedures |
| Knowledge of the principles and procedures for establishing association rules and architectural and/or aesthetic guidelines |
| Knowledge of the principles of legislation and policy development |
| Knowledge of the types and purposes of restrictions |
| Knowledge of the types and purposes of board resolutions |
| Knowledge of governance issues that require legal review |
| Knowledge of the procedures for transitioning governance of the association from developers to owners |
| Knowledge of the types and purposes of committees established by the board |
| Knowledge of the roles, rights, and responsibilities of board members and officers |
| Knowledge of the roles, rights, and responsibilities of community association managers |
| Knowledge of the roles, rights, and responsibilities of members of the community association |
| Knowledge of the types of community associations |
| Knowledge of conflict resolution strategies and techniques |
| **TASK STATEMENTS** |
| ***Enforce association rules and regulations.*** |
| Review association governing documents. |
| Assess association operations to determine if they are in compliance with the association’s governing documents. |
| Prepare and/or update procedures for promoting compliance with association rules, policies, and guidelines. |
| Enforce association rules, policies, and guidelines. |
| Document violations of association governing documents, rules, policies, and/or guidelines. |
| Implement the collection policy adopted by the board (e.g., preparing and/or issuing notices for assessment payments, imposing late fees, suspending privileges and/or voting rights). |
| ***Provide information and/or guidance on association rules, policies, and procedures.*** |
| Provide information and/or guidance to the board on the development and enforcement of association rules, policies, and/or procedures. |
| Coordinate with qualified parties (e.g., attorney, legal representative) to provide information and/or guidance to the board on laws, statutes, ordinances, and other legal requirements that impact the association. |
| Compile and distribute information pertaining to the governance of the association (e.g., legal updates, decisions and actions taken at board meetings). |
| Provide information and/or guidance to the board on the roles and responsibilities of association members and stakeholders (e.g., directors, officers, committee members, owners, association managers). |
| Provide information and/or guidance to the board on the association’s responsibilities for the maintenance of association assets. |
| ***Resolve complaints, disputes, grievances, and conflicts among individuals and/or groups.*** |
| Document complaints, disputes, grievances, and/or conflicts submitted by association members, residents, employees, service providers, and/or board members. |
| Coordinate with qualified parties (e.g., the board, legal representative, specialists) to investigate and resolve complaints, disputes, grievances, and/or conflicts submitted by association members, residents, employees, service providers, and/or board members. |
| ***Process, store, and maintain business and administrative information, data, and records.*** |
| Maintain directories of community information (e.g., preferred service providers, physical amenities, hours of operation, owner and association responsibilities). |
| Organize, store, and maintain association documents, files, and records (e.g., membership lists, contracts, owner files, meeting minutes, board nominations, corporate register, invoices, insurance policies, enforcement notices, information required by law). |
| Review and/or process the association’s corporate registration. |
| Process owners’ requests for architectural and/or aesthetic improvements, changes, or variances. |
| **FINANCIAL MANAGEMENT (20%)** |
| An association manager must demonstrate competence in the administration and stewardship of association finances, including assessment collection, budgeting, investments, and reserve/sinking funds, to (a) ensure budgets and other financial documents are prepared accurately, (b) promote the financial well-being and stability of the association, (c) help the board and association understand the financial condition of the association, (d) build positive relationships that foster trust and confidence with the board and association members, (e) maintain awareness of financial trends that might impact the association, and (f) ensure funds are adequately protected and secured in accordance with board policy and insurance requirements. |
| **KNOWLEDGE STATEMENTS** |
| Knowledge of metrics for evaluating the financial positions of community associations |
| Knowledge of the principles of accounting |
| Knowledge of accounting standards |
| Knowledge of the types and purposes of accounting methods |
| Knowledge of the causes and impact of unrecoverable debts |
| Knowledge of reporting requirements for association fund types |
| Knowledge of the types, contents, and purposes of financial reports and records |
| Knowledge of tax filing responsibilities and filing options for community associations |
| Knowledge of the principles of budget formulation |
| Knowledge of the types of threats to budget estimation |
| Knowledge of the types and purposes of association budgets |
| Knowledge of methods for conducting replacement reserve studies/long-term fund analysis/sinking fund studies |
| Knowledge of the types of financial assets and liabilities |
| Knowledge of the types of investment opportunities available to associations |
| Knowledge of investment principles and terminology |
| Knowledge of the types of income sources for community associations |
| Knowledge of methods for raising and collecting money for the association |
| Knowledge of the purposes and characteristics of audits, reviews, and compilations |
| **TASK STATEMENTS** |
| ***Coordinate and/or monitor the implementation of board-approved financial plans, policies, and procedures.*** |
| Coordinate with authorized parties (e.g., the board, specialists) to conduct and/or update reserve studies. |
| Provide information and/or guidance to the board on best practices related to reserve fund planning. |
| Provide information and/or guidance to the board on the implementation of the physical recommendations from the reserve study (e.g., identifying major capital improvements needed in the community). |
| Provide information and/or guidance to the board on the implementation of the financial recommendations from the reserve study (e.g., identifying and implementing funding sources, reallocating funds, identifying reserve expenditures required to preserve the community). |
| Monitor the implementation of the investment policies and/or procedures adopted by the board. |
| ***Collect and analyze financial data and information.*** |
| Coordinate with qualified parties (e.g., accountants, controllers, bookkeepers) to prepare and/or review financial statements and reports (e.g., balance sheets, statements of revenue and expenses, accounts payable aging report, general ledger detail, bank reconciliations). |
| Analyze financial data (e.g., revenue, expenditures). |
| Prepare estimates of projected revenue and expenses. |
| Investigate and document accounting errors, discrepancies, and variances. |
| Prepare variance reports for the board (e.g., actual versus budgeted). |
| ***Monitor and control the use of financial resources.*** |
| Prepare association budgets. |
| Submit association invoices and/or bills to the board for authorization of payment. |
| Review and approve payment of invoices and/or bills (e.g., ensuring contract amount matches amount billed). |
| Process reimbursement for association expenses (e.g., committee expenses, supplies for board meetings). |
| Provide information and/or guidance to the board on best practices for reviewing/utilizing financial statements and reports (e.g., balance sheets, statements of revenue and expenses, accounts payable aging report, general ledger detail, bank reconciliations). |
| Coordinate with professional accountants to process the association’s audit/review and tax filing documentation. |
| **MEETINGS AND EVENTS (18%)** |
| An association manager must demonstrate competence in the preparation, facilitation, and documentation of meetings and events, including board meetings, membership meetings, and elections, to (a) ensure the board maintains awareness of current issues that impact the community, (b) ensure meetings are organized, efficient, and effective, (c) build trust and confidence with the board, (d) promote timely decision-making on issues that impact the community, and (e) provide the board with information and guidance to render informed decisions on behalf of the association. |
| **KNOWLEDGE STATEMENTS** |
| Knowledge of the principles of group dynamics |
| Knowledge of the procedures for recalling/removing board members and officers of the board |
| Knowledge of the procedures for nominating board member candidates |
| Knowledge of the procedures for conducting board member elections |
| Knowledge of the types of election materials and tools |
| Knowledge of the principles and procedures for recording minutes at board meetings |
| Knowledge of the types, contents, and purposes of supporting documentation for association meetings |
| Knowledge of the contents and purposes of management reports |
| Knowledge of the procedures for calling association meetings |
| Knowledge of the principles and procedures for conducting association meetings |
| Knowledge of the principles and procedures for conducting executive/closed session meetings of the board |
| Knowledge of meeting facilitation techniques |
| Knowledge of the types and purposes of association meetings |
| Knowledge of the types of community events offered by community associations |
| Knowledge of presentation techniques |
| **TASK STATEMENTS** |
| ***Prepare for association elections.*** |
| Verify association members’ eligibility to participate in elections. |
| Assign/Appoint registrars, inspectors of election, or ballot counters for association elections. |
| Collect and process election ballots. |
| ***Prepare for association meetings and/or community events.*** |
| Prepare and/or update calendars for meetings and/or events (e.g., board meetings, membership meetings, parties, fundraisers, networking events). |
| Reserve and/or confirm venues and spaces for community events (e.g., contacting venue staff, confirming attendee registration). |
| Prepare and distribute meeting notices, agendas, and/or schedules. |
| Prepare and distribute packets for board meetings (e.g., agenda, management report, prior meeting minutes, financial report, memos, correspondence, action item lists). |
| Coordinate the attendance of qualified parties (e.g., reserve specialists, lawyers, insurance agent, auditors, vendors) at board and/or membership meetings. |
| Prepare venues and spaces for meetings and/or events (e.g., purchasing materials, arranging furniture, setting up audio and/or video equipment). |
| Prepare registration materials for meetings, elections, and/or events (e.g., rosters, sign-in sheets, signature cards). |
| Calculate and/or confirm quorums for board and/or membership meetings. |
| Conduct/Facilitate orientation programs for new board members. |
| ***Facilitate or conduct board and/or membership meetings.*** |
| Direct or conduct board and/or membership meetings (e.g., obtaining and assigning the floor, facilitating homeowner forum, calling for motions). |
| Assist the board in directing and/or conducting board and/or membership meetings (e.g., providing information about past decisions, monitoring time spent on each topic, adhering to meeting rules, responding to disruptions). |
| Document meeting minutes. |
| Prepare and/or update lists of action items based on decisions made by the board. |
| Deliver presentations at board and/or membership meetings on topics that impact the association. |
| Provide information and/or guidance to the board and/or association membership on meetings, elections, and/or events (e.g., requirements, procedures). |
| **RISK MANAGEMENT (15%)** |
| An association manager must demonstrate competence in the coordination and/or implementation of internal controls, including risk assessment and analysis, auditing, reporting, emergency response, and insurance, to (a) promote the financial well-being and stability of the association, (b) mitigate the association’s risk exposure and liability, (c) protect assets, people, and property, and (d) identify when to rely on external experts and specialists (e.g., insurance agents, risk specialists). |
| **KNOWLEDGE STATEMENTS** |
| Knowledge of the principles of insurance |
| Knowledge of the types and purposes of insurance coverages, endorsements, exclusions, and clauses |
| Knowledge of insurance requirements for community associations |
| Knowledge of procedures for filing insurance applications and claims |
| Knowledge of risk management principles and practices |
| Knowledge of the types and purposes of financial and accounting controls |
| Knowledge of the types and purposes of internal controls for protecting physical assets |
| Knowledge of the principles and procedures for maintaining the security and confidentiality of sensitive information |
| Knowledge of the purposes and components of disaster management plans |
| Knowledge of the types of environmental issues that impact community associations |
| Knowledge of the types of exposure to loss that impact community associations |
| **TASK STATEMENTS** |
| ***Coordinate risk management activities, projects, or services.*** |
| Coordinate with authorized parties (e.g., the board, insurance companies, adjusters, other agents of the association) to submit and/or settle insurance claims. |
| Coordinate with authorized parties (e.g., the board, consultants/specialists) to conduct security/safety assessments (e.g., evaluating camera placement/operation, identifying security system need, identifying access control weaknesses, verifying that lighting is operational and adequate). |
| Coordinate with authorized parties (e.g., the board, consultants/specialists) to implement and/or monitor safeguards/internal controls for mitigating risks and/or threats to the association (e.g., theft, embezzlement, vandalism). |
| Procure and/or stock emergency supplies and equipment (e.g., first aid kits, fire extinguishers, radios, defibrillators, wheelchairs). |
| ***Coordinate the development, updating, and implementation of risk management policies and procedures.*** |
| Coordinate with authorized parties (e.g., the board, consultants/specialists) to prepare and/or update risk management policies and procedures. |
| Coordinate with authorized parties (e.g., the board, consultants/specialists) to prepare and/or update emergency/disaster management plans. |
| Coordinate with authorized parties (e.g., the board, consultants/specialists) to prepare and/or update information security policies and procedures (e.g., data privacy, file retention and destruction, surveillance data). |
| Coordinate with authorized parties (e.g., the board, consultants/specialists) to prepare and/or update facility security policies and procedures. |
| ***Coordinate risk assessments to identify risks, threats, weaknesses, and other hazards.*** |
| Coordinate with qualified parties (e.g., specialists, service providers) to conduct and document risk and/or threat assessments. |
| Coordinate with insurance providers to conduct insurance appraisals. |
| Review insurance policies to ensure they provide coverage that meets requirements set forth in the governing documents. |
| ***Provide information and/or guidance on risk management principles, practices, and issues.*** |
| Distribute information about insurance policies and limitations of coverage to the board and/or association members. |
| Provide information to association members on their responsibilities for obtaining and maintaining insurance coverage (e.g., liability, property, content, improvements). |
| Coordinate with qualified parties (e.g., specialists, service providers) to respond to emergency incidents (e.g., contacting first responders, photographing evidence, contacting restoration services). |
| **PROPERTY MAINTENANCE (14%)** |
| An association manager must demonstrate competence in the administration of programs and activities that preserve the operational and physical condition of association property, including site inspections, preventative maintenance, oversight, and timely reporting, to (a) ensure parties entrusted with the care and operation of association assets are held accountable, (b) ensure the board maintains awareness of current issues that impact association assets, (c) promote, protect, and increase property values, (d) mitigate risks from physical hazards, and (e) prevent losses due to deferred maintenance. |
| **KNOWLEDGE STATEMENTS** |
| Knowledge of the types of materials and equipment used for constructing and repairing residential facilities |
| Knowledge of the types, contents, and purposes of property maintenance reports |
| Knowledge of the purposes and components of property maintenance plans |
| Knowledge of the types of hazardous and non-hazardous goods used by community associations |
| Knowledge of the principles of facility energy management |
| Knowledge of the principles of environmental sustainability |
| Knowledge of the types and purposes of maintenance programs |
| Knowledge of the types and purposes of maintenance management systems and tools |
| Knowledge of the types of property maintenance activities |

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| **TASK STATEMENTS** |
| ***Conduct and/or coordinate site visits or property inspections.*** |
| Conduct site visits and/or surveys to identify and list the association’s physical assets (e.g., recreation/fitness facilities, swimming pools, maintenance equipment and tools, boilers, parking areas, perimeter walls). |
| Conduct site visits and/or property inspections to identify violations of association governing documents (e.g., landscaping alterations, deviations from community standards, unapproved exterior modifications). |
| Conduct site visits and/or property inspections to identify property maintenance needs (e.g., cracked sidewalks, peeling paint, wood rot, broken fences, malfunctioning elevators, rust, cracks in the foundation, leaks, standing water). |
| Coordinate site visits and/or property inspections with qualified parties (e.g., service providers, the board, committees). |
| Conduct site visits to evaluate the progress and/or completion of maintenance activities/projects. |
| ***Direct and/or coordinate property maintenance activities, projects, or services.*** |
| Prepare and/or update property maintenance plans, schedules, calendars, and/or responsibility charts. |
| Prepare and/or update maintenance and operational processes and procedures. |
| Coordinate with qualified parties (e.g., service providers, specialists) to develop specifications for maintenance projects and tasks. |
| Direct and/or coordinate with service providers to perform maintenance activities (e.g., routine, preventative, emergency, breakdown). |
| Schedule service providers to perform maintenance and repairs. |
| Investigate maintenance inquiries and requests submitted by association members and/or residents. |
| Prepare work orders for maintenance and/or repair services. |
| ***Prepare, compile, and/or or update maintenance documentation.*** |
| Prepare property inspection reports and/or site visit reports. |
| Compile and/or review property inspection reports developed by service providers. |
| Document maintenance inquiries and requests submitted by association members and/or residents. |
| Track maintenance needs, requests, and responses using maintenance management systems. |
| Monitor and document service providers’ progress, performance, and/or compliance with contractual obligations. |
| **CONTRACTING (10%)** |
| An association manager must demonstrate competence in the administration of service or repair contracts, to (a) ensure the most qualified service providers are selected to perform work on behalf of the association, (b) ensure service providers perform effective, efficient, and high quality work, (c) build positive, professional relationships that foster trust and confidence with the board, association members, employees, and service providers, and (d) ensure and maintain accountability and oversight of service providers. |
| **KNOWLEDGE STATEMENTS** |
| Knowledge of the contents and components of requests for proposals, bids, or quotes |
| Knowledge of the procedures for evaluating and selecting proposals, bids, or quotes |
| Knowledge of contract types |
| Knowledge of contract provisions |
| Knowledge of contract management procedures |
| Knowledge of the purposes and contents of management agreements |
| Knowledge of insurance requirements for vendors/contractors |

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| **TASK STATEMENTS** |
| ***Identify service providers to fulfill service or repair contracts.*** |
| Prepare requests for proposals (RFPs) to obtain bids from service providers. |
| Prepare bid analyses for review by authorized parties (e.g., the board, legal counsel, management company president/CEO). |
| Coordinate with authorized parties (e.g., the board, legal counsel, CFO, company president/CEO) to review, evaluate, and select bids/quotes. |
| Obtain and/or verify information about service providers (e.g., qualifications, licenses, credentials, services, pricing). |
| Conduct interviews with service providers. |
| ***Coordinate the ratification and/or amendment of service or repair contracts.*** |
| Coordinate with authorized parties (e.g., the board, legal counsel, CFO, company president/CEO) to conduct contract negotiations with service providers. |
| Conduct contract negotiations with service providers. |
| Coordinate the ratification of service or repair contracts (e.g., obtaining board approval, notifying service providers of contract award). |
| Coordinate with authorized parties (e.g., the board, legal counsel) to amend service or repair contracts (e.g., increasing service expectations, adjusting cost/timeline, negotiating/executing changes to terms and conditions). |