2024 Legislative Guide





A LETTER FROM THE EXECUTIVE DIRECTOR OF CALL

Dear CALL Members:

Welcome to Becker's 2024 Legislative Guidebook, a comprehensive resource designed to provide clarity and guidance on the new Florida laws impacting condominiums, cooperatives, and homeowners' associations (HOAs). As a state with a substantial number of community associations, Florida's legislative changes can significantly influence the management and governance of these communities. This guidebook aims to equip board members, community managers, and legal professionals with the knowledge they need to navigate these changes effectively.



Donna DiMaggio Berger, Founder & Executive Director

The 2024 legislative session has introduced several key changes that address various aspects of community association governance. These

changes aim to enhance transparency, accountability, and the overall oversight of community associations.

This year's legislative updates cover a broad spectrum of issues, including financial management, board governance, and resident rights. Our 2024 Legislative Guidebook is structured to provide a detailed overview of each new law, its implications, and practical steps for compliance. Sections include:

- Summary of the Law: A concise explanation of the new statute or amendment.
- Impact Analysis: Insights into how the change will affect community associations.
- **Compliance Guidelines:** Step-by-step instructions on what associations need to do to comply with the new requirements.
- Best Practices: Recommendations for implementing changes smoothly and effectively.

It is crucial for community associations to stay informed and proactive in adapting to legislative changes. This guidebook serves as a valuable tool to help you understand and implement the new laws. However, this Guidebook does not constitute nor is it a substitute for the legal advice you need to ensure that your association operates in compliance with these legal changes. Please contact your Becker attorney at your earliest convenience to implement these changes in your community.

Very Truly Yours,

Donna DiMaggio Berger, Founder & Executive Director Community Association Leadership Lobby

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CONDOMINIUMS, COOPERATIVES AND HOMEOWNERS' ASSOCIATIONS' BILLS THAT PASSED

CS/HB 1021 "CONDO 3.0" CHAPTER NO. 2024-244, LAWS OF FLORIDA Effective Date: Except as otherwise expressly provided, July 1, 2024

The Condominium Association Bill, House Bill 1021, significantly impacts many areas of condominium and cooperative governance, with comprehensive changes to Chapter 718 of the *Florida Statutes*, Chapter 719 of the *Florida Statutes*, and several changes to Chapter 468 of the *Florida Statutes*.

MANAGEMENT

Summary of the Law:

Regarding official records, House Bill 1021 amends Section 468.4334 to require community association managers and community association management firms ("CAMs") to return official records of an association within twenty (20) business days after termination of a contract or receipt of a written request for return, whichever occurs first. Community associations impacted include condominium associations, cooperatives, and homeowners' associations, but not timeshares. A rebuttable presumption is created that the CAM "willfully" failed to comply if the CAM fails to meet the deadline. For such failure to comply, the Bill adds penalties including the suspension of the CAM license and a charge of \$1,000.00 per day for up to ten (10) business days. The CAM is allowed to retain the records to complete an ending financial statement or report for up to twenty (20) business days after termination. But if the association fails to provide access to the accounting records necessary, the CAM is relieved from further responsibility or liability relating to the preparation of such ending financial statement or report. Additionally, the Bill requires the termination notice of a management contract to be sent by certified mail, return receipt requested, or in the manner required by the contract.

In terms of conflicts of interest, a new section, Section 468.4335, is created requiring CAMs to disclose conflicts of interest to the board. A rebuttable presumption is created as to the existence of a conflict of interest if a CAM with a financial interest, or relative of such persons, enters into a contract for goods and services with the association without prior notice, or if a CAM with a financial interest, or relative of such persons, holds an interest in or receives compensation or anything of value from a corporation, LLC, partnership, LLP, or other business entity that conducts business with the association or proposes to enter into a contract or other transaction with the association without prior notice.

This new section also adds requirements for associations in dealing with conflicts of interest. An association must solicit multiple bids, if it receives and considers a bid that exceeds \$2,500.00 for goods and services, other than for CAM services, from a CAM with a financial interest in a community association management

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firm. Moreover, an association, that approves any activity or contract that constitutes a conflict of interest, is required to list the proposed activity and attach all documents related to the proposed activity to the meeting agenda of the next board meeting, and to disclose the possible conflict in the minutes. Two-thirds of all directors present must affirmatively approve the contract and the conflict and contract or other transaction must be disclosed to the members at the next regular or special members' meeting. Further, a conflict of interest in a contract that has been previously disclosed must again be noticed and voted on in the manner provided above upon its renewal, but not during the term of the original contract. An association is authorized to cancel a CAM contract for failure to follow this paragraph. If the association cancels said contract, it shall be liable for only the reasonable value of the services provided up to cancellation and not for termination fees, liquidated damages, or other form of penalties for such cancellation. The association may cancel a contract if a possible conflict of interest was not disclosed.

Lastly, the Bill reenacts and amends Section 468.436 to revise the list of grounds for which the Department of Business and Professional Regulation ("DBPR") may take disciplinary actions against community association managers or firms.

Definitions and Contents of Declaration of Condominium

Summary of the Law:

House Bill 1021 amends Section 553.899 to extend the milestone inspection exemption to four-family dwellings in a three-story building.

Further, Section 718.103 is amended to revise and add definitions. Specifically, the definition of "condominium property" is amended to the lands, leaseholds, and improvements, any personal property, and all easements and rights appurtenant thereto, regardless of whether contiguous, which are subject to condominium ownership. A definition of "hurricane protection" is added as hurricane shutters, impact glass, code-compliant windows or doors, and other code-compliant hurricane protection products used to preserve and protect the condominium property. Finally, the definition of "kickback" is added to mean anything of service or value, for which consideration has not been provided, for an officer's, a director's, or a manager's own benefit or that of his or her immediate family, from any person providing or proposing to provide goods or services to the association.

Section 718.104 is also amended to add requirements for the contents of a declaration. First, it requires declarations for condominiums created within a portion of a building or multiparcel building to identify the condominium as "a condominium within a portion of a building or within a multiple parcel building" in the name of the condominium. Second, it now requires residential and mixed-used condominium declarations to specify whether the unit owner or the association is responsible for the installation, maintenance, repair, or replacement of hurricane protection to protect the condominium property and association property.

Best Practices:

Associations should confer with counsel to amend their declarations to define whether the Association or the owners are responsible for the installation, maintenance, repair, or replacement of hurricane protection to protect the condominium property and association property.

Official Records

House Bill 1021 makes comprehensive changes to requirements for association records retentions and records access.

Summary of the Law:

House Bill 1021 amends Section 718.111 to provide requirements relating to e-mail addresses and facsimile numbers of unit owners. Email addresses and fax numbers of those owners who consent to email notice, and for those who consent to the release of their information, may be made available to other owners, responsive to a records request, but must be redacted from records provided to third parties. An association must ensure that these are only used for business operations of the association and may not be sold or used by third parties. If personal information is included in documents released to third parties, other than unit owners, the association must redact the personal information. An association is not liable for inadvertent disclosures unless such disclosure was made with a knowing or intentional disregard of the protected nature of such information.

Section 718.111 is further amended to add to the list of official records that must be maintained by the association to include all invoices, receipts, and deposit slips; building permits; board member education certificates; and checklists (described below). It requires that the records be maintained in an organized manner facilitating inspection, as well as a good faith obligation to obtain and recover official records that are lost, destroyed, or otherwise unavailable. The association is allowed to direct owners seeking access to records to the association website or to a mobile application. The association is required to simultaneously provide a checklist for record requests identifying which records are available and not available. This creates a rebuttable presumption that the association complied with the request for access to association records. The checklist must be maintained as an official record for seven (7) years.

The Bill also modifies the method of delivery of certain financial reports to unit owners to U.S. mail or personal delivery at the mailing address, property address, e-mail address, or facsimile number provided to the association. It requires the association to provide a copy to owners of the most recent financial report <u>and</u> (rather than or) a notice that a copy will be delivered within five (5) business days of a request. The association cannot provide a different level of financial reporting than required with a membership vote for consecutive fiscal years.

The penalties for failing to abide by records access requirements have been increased and are covered below in the "Crimes" section.

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Best Practices:

Associations that do not have a records retention policy or rules addressing records retention should create such a policy or adopt written rules governing the method of records retention and the time period during which such records must be retained. Additionally, associations should consult with their management professional and/or review their management contract to confirm whether the manager is tasked with handling the document inspection process. Finally, associations that do not have a written records inspection policy should create such a policy to clarify procedures and obligations, especially in relation to contractual obligations of a management company. Such policy should include a rule on how records requests must be sent due to the harsh nature of the penalties for not responding.

Compliance:

Associations must make records available to owners within ten (10) business days of a records request. To comply with the new law, the Association must include a checklist with its response that identifies which records were made available and which records were not available.

Insights:

The law allows the Association to direct an owner to the website as a response to a records request.

Websites

Summary of the Law:

Effective January 1, 2026, an association managing a condominium with 25 or more units must post digital copies of the documents on its website or make them available through a mobile application. Section 718.111 is also amended to require copies of certain building permits to be posted on an association's website or mobile application.

Compliance:

Any associations managing a condominium with 25 or more units should investigate website providers to comply with the new requirement to have a website by January 1, 2026.

Board Requirements

Comprehensive changes are also made by House Bill 1021 to requirements for board meetings, notices, and educational requirements.

Summary of the Law:

House Bill 1021 amends Section 718.112 to require boards of residential condominium associations larger than 10 units to hold <u>quarterly</u> board meetings, for which the board meeting agenda must include an opportunity for members to ask questions of the board. The rights of members to speak at board meetings is

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expanded to include the right to ask questions relating to reports on the status of construction or repair projects, the status of revenues and expenditures during the current fiscal year and other issues affecting the condominium. Section 718.3027 is also amended to revise the requirements for attendance at a board meeting in the event of a conflict of interest. The possibly conflicted director and any relative of the director must leave the meeting during the discussion and vote on the possible conflict. The attendance of the possibly conflicted director counts towards a quorum, even for the vote in his/her absence. Lastly, Section 718.112 is amended to require that if the agenda of a board meeting includes approval of a contract for goods or services, a copy of the contract must be provided with the notice and be made available for inspection and copying upon written request or made available on the association's website or a mobile application.

House Bill 1021 has also added educational requirements for board members in addition to the written certification that the director has read and will uphold the association's governing documents. The Bill amends Section 718.112 to require that each board member submit the written certification and a certificate to the secretary of the association of having completed a Division-approved four (4) hour curriculum covering: milestone inspections, structural integrity reserve studies, elections, recordkeeping, financial literacy and transparency, levying of fines, and notice and meeting requirements. A new director must submit proof within one (1) year before being elected or appointed or ninety (90) days post-election or appointment. Directors elected or appointed before July 1, 2024, must comply by June 30, 2025. The education certificate is valid for seven (7) years so long as the board member serves without interruption. Nevertheless, each board member must complete a one-hour legal update course each year and provide a certificate of completion for same to their association secretary for inclusion in the association records.

Impact Analysis:

The new educational requirements in the law will help board members be better prepared to fulfill their fiduciary duties to the Association and for the complex scenarios that arise when serving on a board of directors.

Best Practices:

The Board meeting requirements should be considered and implemented on an immediate basis. Associations should strongly consider adopting a meeting participation policy, or if the Association already has one, updating it to comply with the above. Associations should ask their owners to consent to electronic notice via email in lieu of U.S. Mail. Many more documents must be sent to unit owners under this new law and providing such notice by email would save the association time and money.

Compliance:

Board members will have to attend the four (4) hour educational courses, as well as submit statements that they have read the governing documents and acknowledge their fiduciary duties.

Crimes

House Bill 1021 adds a myriad of association voting crimes, voting conspiracy crimes, and records inspection crimes to the Condominium Act, and requires that anyone charged with such a crime be removed from office.

Summary of the Law:

Records Access Crimes:

Section 718.111 is amended to provide criminal penalties for knowingly, willfully, and repeatedly violating records access requirements; knowingly destroying accounting records; and, willfully and knowingly refusing to release or produce association records with the intent to avoid or escape detection, arrest, trial, or punishment for the commission of a crime, or to assist another person do so. Such person must also be removed from office and a vacancy declared.

Voting Crimes:

Section 718.112 is amended to provide criminal penalties for certain fraudulent voting activities relating to association elections. Fraudulent voting crimes include:

- 1. Willfully and falsely swearing an oath or willfully procuring another to swear a false oath;
- 2. Perpetrating fraud, or attempting to perpetrate fraud, or aiding in the perpetration of fraud, in connection with a vote cast or attempted to be cast;
- 3. Preventing a member from voting or preventing a member from voting as they intended, by changing a ballot, an envelope, a vote, or a voting certificate.
- 4. Menacing, threatening, or using bribery or corruption to influence a vote or deter a member from voting;
- 5. Giving or promising something of value with the intent to buy a vote or corruptly influence a vote;
- 6. Using or threatening to use force or violence or intimidation or coercion or intimidation to induce or compel a member to vote or refrain from voting.

And voting conspiracy crimes include:

- 1. Knowingly aiding, abetting, or advising a person in the commission of a fraudulent voting activity related to association elections.
- 2. Agreeing, conspiring, combining, or confederating with at least one other person to commit a fraudulent voting activity related to association elections.
- 3. Having knowledge of a fraudulent voting activity related to association elections and giving any aid to the offender with the intent that the offender avoid or escape detection, arrest, trial, or punishment. This does not apply to a licensed attorney giving legal advice to a client.

Miscellaneous Crimes:

Section 718.111 is amended to provide criminal penalties for any officer, director, or manager of an association who unlawfully solicits, offers to accept, or accepts a kickback, and requires such officers, directors, or managers to be removed from office and a vacancy declared.

And Section 718.111 is amended to revise criminal penalties and require certain persons who unlawfully use a debit card issued in the name of an association for any expense that is not a lawful obligation of the association, meaning an obligation that has been properly preapproved by the board and is reflected in the meeting minutes or the written budget, to be removed from office and vacancy declared.

Lastly, Section 718.112 is amended to revise the circumstances under which a director or officer must be removed from office after being charged by information or indictment to: forgery of a ballot envelope or voting certificate; theft or embezzlement involving association funds; destruction or refusal to allow inspection or copying of an official record in furtherance of a crime; obstruction of justice; and any criminal violation under the Condominium Act. Such director or office cannot serve as an officer or director of any association and may not have access to association records, except by court order while the charges are pending.

Hurricane Protection

Summary of the Law:

As mentioned above, Section 718.103 is amended to define hurricane protection, and Section 718.104 is amended to require declarations to specify who is responsible for hurricane protection. These changes are applied along with the more comprehensive amendments to Sections 718.113 and 718.115 on hurricane protection.

House Bill 1021 amends Section 718.113 to provide retroactive standard obligations for hurricane protection. The Bill requires the hurricane protection provisions to apply to all residential and mixed-use condominium associations already in existence on July 1, 2024 and requires condominium associations to adopt hurricane protection specifications. It also specifies that the installation, maintenance, repair, replacement, and operation of hurricane protection is not considered a material alteration or substantial addition to the common elements or association property.

Section 718.113 is further amended to authorize the board to install or require unit owners to install hurricane protection. A vote of the unit owners to require the installation of hurricane protection must be set forth in a certificate attesting to such vote and include the date that the hurricane protection must be installed, and requires such certificate to be recorded. The board is required to provide to the unit owners a copy of the recorded certificate. However, the validity or enforceability of a vote is not affected by the board's failure to record the certificate or provide a copy. A vote of the owners is not required if the installation, maintenance, repair and replacement of hurricane protection, or any exterior windows, doors, or other apertures protected by hurricane protection is the responsibility of the association. The Bill further prohibits the installation of the same type of hurricane protection previously installed unless it has reached the end of its useful life or unless it is necessary to prevent damage to the common elements or to a unit. And, it

prohibits boards from refusing to approve hurricane protection but may require adherence to an existing unified building scheme regarding the external appearance of the condominium.

House Bill 1021 revises the responsibility for the cost of the removal or reinstallation of hurricane protection, including exterior windows, doors, or apertures. A unit owner is not responsible for the cost of any removal or reinstallation of hurricane protection if its removal is necessary for the maintenance, repair, or replacement of other condominium property or association property for which the association is responsible. The board shall determine if the removal or reinstallation of hurricane protection must be completed by the unit owner or the association. If such removal or reinstallation is completed by the association, the costs incurred by the association may not be charged to the unit owner; if such removal or reinstallation or the association must reimburse the unit owner for the cost of the removal or reinstallation or the association must apply a credit toward future assessments in the amount of the unit owner's cost to remove or reinstall the hurricane protection. If the removal or reinstallation of hurricane protection is the responsibility of the owner and the association completes such removal or reinstallation and then charges the owner for such removal or reinstallation, such charges are enforceable as assessments.

House Bill 1021 amends Section 718.115 to specify that if the installation of hurricane protection is the responsibility of the unit owners, the cost of installation by the association is not a common expense, and must be charged individually to the owners based on cost to the unit, and the charges are enforceable as assessments. Unit owners that have installed hurricane protection that complies with the current building code to be excused from assessment or to receive a credit. A credit is applicable if the installation of hurricane protection is for all other units that do not have hurricane protection and the cost of such installation is funded by the association's budget, including reserves. The amount of credit must be equal to the amount the owner would have been assessed to install the hurricane protection. Expenses for installation, replacement, operation, repair or maintenance of hurricane protections on common elements and association property are common expenses.

Impact Analysis:

This new law contains a conflict between Section 718.113(5)(d), which states that a unit owner is not responsible for the cost of any removal or reinstallation of hurricane protection if that removal is necessary for the association to undertake necessary maintenance, and Section 718.113(5)(e), which provides that the association may assess (and lien) for removal and reinstallation costs if the removal or reinstallation of hurricane protection is the responsibility of the unit owner.

Best Practices:

The issue of who pays to remove and reinstall hurricane shutters is important when undertaking or planning future concrete restoration and painting projects. The Association should confer with counsel to amend the Declaration to clearly define the responsibility for the removal and reinstallation costs of hurricane protection before this becomes an issue during a repair or renovation project.

Compliance:

To adhere to the new law, the Association is required to adopt hurricane protection specifications.

Electronic Voting

Section 718.128 is amended to provide that a unit owner may consent to electronic voting electronically and that a board must honor a unit owner's request to vote electronically at all subsequent elections until that owner opts out.

Reserves

Summary of the Law:

Section 718.112 is amended to authorize a vote of the majority of members to pause the contribution to reserves or reduce reserves if the local building official determines that the condominium building is uninhabitable. The board is also authorized to expend the reserve funds to make the building habitable. The association is then required to resume contributing to reserves once the local building official determines that the building is habitable.

Section 718.112 is further amended to require an association to distribute or deliver copies to owners of a SIRS, or a notice that the SIRS is available for inspection and copying, within forty-five (45) days of receiving the SIRS and specifying the manner of distribution or delivery. The association must also provide the Division with a statement indicating that the SIRS was completed and provided or made available.

Best Practices:

If the Association has already completed its SIRS, it is strongly recommended that the Association comply within 45 days of the effective date of the new law (July 1, 2024), which is by August 15, 2024, by distributing or delivering copies to owners of a SIRS, or sending out a notice that the SIRS is available for inspection and copying.

Statute of Repose

Section 718.124 is amended to provide that the statute of repose does not begin to run until the unit owners elect a majority of the members of the board.

Strategic Lawsuit Against Public Participation ("SLAPP") Suits

Summary of the Law:

Section 718.1224 is amended to include condominium associations within the list of entities that may not file a meritless claim so as to discourage participation. The association is prohibited from fining, discriminatorily increasing assessments, discriminatorily decreasing services, or bringing or threatening to bring an action for defamation, libel, slander or tortious interference action, based on certain protected conduct. For an owner to raise the defense of retaliatory conduct, the owner must have acted in good faith, and not for any improper purposes, such as to harass or to cause unnecessary delay or for frivolous purpose or needless increase in the cost of litigation. Conducts for which the association cannot retaliate:

- 1. Owner in good faith complained to a government agency charged with the responsibility for enforcement of a building, housing, or health code of a suspected violation
- 2. Owner has organized, encouraged, or participated in a unit owners' organization
- 3. Owner submitted information or filed a complaint alleging criminal violations or violations of the condo act
- 4. Owner has exercised her rights under the condo act
- 5. Owner has complained to the association for failure to comply with the condo act or 617
- 6. Owner made a public statements of the operation or management of the association.

The association is prohibited from expending association funds to support a defamation, libel, slander or tortious interference against a unit owner based on protected conduct.

DBPR Jurisdiction

Summary of the Law:

House Bill 1021 greatly expands DBPR jurisdiction.

It amends Section 718.111 to require the Division, upon receipt of a complaint, to monitor an association's compliance with the statutory requirement to maintain insurance or fidelity bonding of all persons who control or disburse funds of the association, and issue fines and penalties if necessary.

Moreover, Section 718.501 is revised to add the following circumstances under which the Division has jurisdiction following turnover: financial issues and financial reporting, assessments, fines and commingling of reserves and operating funds, use of debit cards, operating budgets, allocation of reserve funds, financial records and any other records necessary to determine revenue and expenses of the association; elections, including election and voting requirements, recalls, electronic voting, and elections that occur under emergency powers; procedural violations of meeting requirements including quorum requirements, voting

requirements, proxies, board meetings and budget meetings; conflicts of interest; removal of board members or officers; and member written inquiry requests.

Section 718.501 is also amended to require that the Division provide official records, without charge, to a unit owner denied access if unit owner provides Division with proof of two (2) consecutive, identical requests not timely addressed; to authorize the Division to issue certain citations; to require the Division to provide a Division-approved training provided with the template for the certificate issued to board members; to require that the Division refer suspected criminal acts to the appropriate law enforcement authority; to authorize certain Division officials to attend and observe association meetings; to authorize the Division to request access to an association's website or mobile application to investigate complaints regarding access to official records; and to require the Division to provide a list of associations that have completed the SIRS after December 31, 2024, to the Governor and Legislature.

Section 718.5011 is amended to provide that the secretary of the DBPR, rather than the Governor, appoints the condominium ombudsman.

The DBPR shall review website requirements for official records and make recommendations regarding any additional official records of a condominium association that should be included in the records maintenance section of the statute. The recommendations shall be submitted to the Governor, the President of the Senate, and the Speaker of the House by January 1, 2025.

Impact Analysis:

With the expanded jurisdiction of the DBPR, there is greater potential for investigations and penalties.

Developer Provisions

Summary of the Law:

Section 718.112 is amended to require a director appointed by the developer to satisfy the educational certificate requirement for any subsequent appointment to a board by a developer within seven (7) years after the date of issuance of the most recent educational certificate, including any interruption of service on a board or appointment to a board in another association within that seven (7) year period.

Effective October 1, 2024, Section 718.202 will require a Developer to provide a surety bond or letter of credit in lieu of an escrow payment for nonresidential condominiums only.

Section 718.301 is amended to require developers to deliver a structural integrity reserve report to an association upon relinquishing control of the association.

Effective October 1, 2024, Section 718.407 will be added to authorize a condominium to be created within a portion of a building or within a multiple-parcel building. The common elements are only those portions of

the building submitted to the condominium form of ownership. The declarations of such condominiums or other certain recorded instruments must specify which portions of the building are included in the condominium and which are excluded; the party responsible for maintaining and operating those portions of the building which are shared facilities; the manner in which the expenses for the maintenance and operation of the shared facilities will be apportioned; the party responsible for collecting the shared expenses; and the rights and remedies available to enforce the payment of the shared expenses. The Bill authorizes the association to inspect and copy the books and records upon which the costs for maintaining and operating the shared facilities are based and to receive the annual budget. And, requires a specified disclosure summary for contracts of sale for a unit in such condominiums. Provides that the creation of a multiple-parcel building is not a subdivision of the land.

Impact Analysis:

The new law will allow developers to maintain control over portions of a building that have traditionally been treated as common elements which are controlled and administered by the condominium association.

Miscellaneous

Amends Section 718.303 requiring the association to notify a unit owner that his or her voting rights may be suspended due to non-payment of a monetary obligation at least 90 days before an election.

Effective October 1, 2024, amends Section 718.503 requiring non-developer unit owners to include an annual financial statement and annual budget in the information provided to a prospective purchaser; revising information that must be included in contracts for the resale of residential unit; requiring certain disclosure be made if a unit is located in a specified type of condominium.

Amends Section 718.504 requiring certain information provided to prospective purchasers to state whether the condominium is created within a portion of a building or within a multiple parcel building.

Cooperatives

Summary of the Law:

A few sections of the Cooperative Act were also amended by House Bill 1021. Specifically, House Bill 1021 amends Section 719.106 to require an association to distribute or deliver copies of a SIRS to owners within forty-five (45) days of receiving the SIRS and specifying the manner of distribution or delivery. It also requires the cooperative association to provide the Division with a statement indicating that the SIRS was completed and provided or made available.

Section 719.129 is amended to provide that a unit owner may consent electronically to electronic voting at all subsequent elections, and providing that a board must honor a unit owner's request to vote electronically until the owner opts out.

Lastly, Section 719.301 is amended to require a SIRS to be included in the turnover report from the Developer to the association.

Best Practices:

If the Association has already completed its SIRS, it is strongly recommended that the Association comply within 45 days of the effective date of the new law (July 1, 2024), which is by August 15, 2024, by distributing or delivering copies to owners of a SIRS, or sending out a notice that the SIRS is available for inspection and copying.

CS/HB 1029: MY SAFE FLORIDA CONDOMINIUM PILOT PROGRAM CHAPTER NO. 2024-108, LAWS OF FLORIDA Effective Date: July 1, 2024

Summary of the Law:

The Bill establishes the My Safe Florida Condominium Pilot Program, a grant program designed to assist condominiums located up to 15 miles from the coastline lower their insurance premiums. Provides for hurricane mitigation inspections and grants for certain kinds of hurricane mitigation improvements when those improvements are found by a hurricane mitigation inspection to be necessary to reduce the property's vulnerability to hurricane damage. Provides processes and procedures for condominium associations to authorize participation in the grant process, processes for a membership vote, for certification of hurricane mitigation inspectors, and limitations on the types of improvements that would qualify for a grant.

Provides for a maximum grant award of One-hundred-seventy-five-thousand dollars (\$175,000.00) per association, to be matched by the association on the basis of \$1 paid by the association for every \$2 paid by the state in grant funds. The Bill provides funding for replacement window and door projects, to be limited to \$750 per replacement window or door, not to exceed \$1,500 per unit, with a maximum grant award of fifty percent of the cost of the project; roofing projects are limited to \$11.00 per square foot multiplied by the square footage of the replacement roof, not to exceed \$1,000 per unit, with a maximum grant award of fifty percent of the cost of the roofing project. Provides that the Department of Financial Services shall hire a contractor to oversee the grant process.

Impact Analysis:

For the lucky few condominium associations able to secure grant funds, they will be able to offset expenses relating to certain building improvements.

CS/HB 1203: HOMEOWNERS ASSOCIATIONS CHAPTER NO. 2024-221, LAWS OF FLORIDA Effective Date: July 1, 2024

Summary of the Law:

The Homeowners' Association Bill, House Bill 1203, contains many significant changes to Chapter 720 of the *Florida Statutes*, focused on transparency, and accountability, beginning with several changes to Chapter 468 of the *Florida Statutes*. Community association managers and community management firms authorized by contract to provide management services to homeowners' associations must annually attend at least one membership meeting or board meeting for each of the homeowner's associations they represent, under *Florida Statute* 468.4334. Additionally, manager or management company employee names, contact information, job responsibility information and employee working hours must be posted on a homeowners' association website, and the manager or management company must provide a copy of their management contract with the association to any owner upon request. The Bill also amends *Florida Statute* 468.4337, governing community manager continuing education for all managers, including those who manage condominiums and cooperatives, to require not more than 10 hours of continuing education coursework for renewal of a CAM license. Managers who manage homeowners' associations, including at least 3 hours on record keeping.

House Bill 1203 adds to *Florida Statute* 720.3033, requiring board members to complete an approved board member education curriculum within 90 days after being elected or appointed to the board. The board member certification course must cover financial literacy and transparency, record keeping, the levy of fines, and notice and meeting requirements. Additionally, all directors must complete at least four hours of continuing education annually, unless their association has two thousand-five hundred (2,500) or more parcels. Directors of larger associations with two thousand-five hundred (2,500) parcels or more must complete eight hours of continuing education annually.

House Bill 1203 requires every homeowners association with 100 or more parcels to have a website or application by January 1, 2025. *Florida Statute* 720.303 is amended to provide a list of association records that must be posted on the association website or application, and additional parameters for an association website or application. Additionally, any association with 1000 or more parcels must prepare audited financial statements going forward, regardless of the association's total revenue. Associations no longer have the right to provide a lesser level of financial statement than required by law for consecutive fiscal years.

Additionally, House Bill 1203 adds new records access crimes, new voting conspiracy crimes, and penalties for same to *Florida Statutes* 720.303 and 720.3065 respectively. The Bill adds penalties for other wrongdoings as well. A director, member of the board or manager who knowingly, willfully, and repeatedly fails to retain or provide access to association records with the intent to cause harm to the association or its members, commits a second-degree misdemeanor. "Repeatedly" is defined as two or more violations in a

twelve-month period. Anyone who knowingly and intentionally defaces or destroys an accounting record, or who knowingly or intentionally fails to prepare a record, with the intent to cause harm to the association, or one of its members, commits a first-degree misdemeanor. Any person who knowingly and intentionally refuses to release or otherwise produce association records with the intention to avoid detection for the commission of a crime or to assist another person with such avoidance or escape commits a felony of the third-degree. Accepting kickbacks becomes a third-degree felony. Use of an association debit card for an expense not memorialized in the minutes of the association, or provided for in the budget, becomes theft. Voting conspiracy crimes are first-degree misdemeanors. Moreover, any officer or director charged with any crime contained within Chapter 720 of the *Florida Statutes* must be removed from office and a vacancy declared. Additionally, an association must respond to any law enforcement subpoena within five (5) days or as directed by the subpoena, and the association must assist the law enforcement agency in its investigation to the extent permissible by law.

Other changes within HB 1203 significantly impact architectural review, the homeowners' association fining processes, and visible parking restrictions. Under new revisions to *Florida Statute* 720.3035 an association must not adopt a covenant, rule or guideline limiting or restricting interior changes to a dwelling if those changes are not visible from the frontage of the parcel, an adjacent parcel, an adjacent common area, or the community golf course. An architectural review committee must not require review of plans and specifications for air conditioning systems, refrigeration systems, heating or ventilation systems that are not visible from the frontage of the parcel, adjacent common area, or community golf course, if such systems are substantially similar to systems that have been approved by the architectural review committee or the association in the past. The list of areas from which backyard storage items cannot be visible is expanded in *Florida Statute* 720.3045 to include adjacent common areas and community golf courses. An architectural review committee must provide a parcel owner with written notice of any denial of request for architectural modification, stating with specificity the rule or covenant the committee relied upon when denying the request and the specific aspect of the proposal that does not conform to such rule or covenant. The Bill also allows an owner to sue the association for damages if the owner's rights have been infringed by an architectural or similar committee.

Under House Bill 1203, the fining process in *Florida Statute* 720.305 changes significantly. Homeowners' associations must no longer fine for certain violations, including leaving garbage cans out at the curb or end of driveway for twenty-four hours before or twenty-four hours after garbage day. Associations are also prohibited from fining an owner or occupant for leaving holiday decorations or lights up, for less than one week after the association provides written notice to take them down. Additionally, House Bill 1203 expands the timeline for payment of a fine and adds requirements for the written notice to a homeowner confirming the fine has been assessed. If a violation is cured by the time of the compliance committee hearing, or in the manner specified in the notice of fine hearing, then the fine may not be imposed. Additionally, going forward, association documents will not be able to regulate certain visible parking of personal vehicles, including, certain trucks and work vehicles, and first responder vehicles.

Finally, in new Section (14) of *Florida Statute* 720.303, the Bill creates a new right to request an accounting, whereby an owner can request a detailed accounting of any amounts they may owe to the association related

to parcel ownership. If the association fails to respond to the request for accounting within fifteen (15) business days after receipt of the written request, then the association waives collection of any delinquent fines more than thirty (30) days past due. An owner may only request an accounting once every ninety (90) days.

Best Practices:

Associations whose declarations do not incorporate the Florida Statutes as amended from time to time, should confer with counsel to determine which of the new statutory provisions are substantive, and therefore not retroactively applicable to their Declaration. Additionally, if the association has a fining or compliance policy, such policy should be updated to comply with the new statute. If the association does not have such a policy, it should develop one. If the association has an architectural review policy, it should likewise be updated to comply developed for those associations that do not yet have such a policy. Any associations with one hundred (100) parcels or more should investigate website providers to comply with the new requirement to have a website by January 1, 2025. Associations should also request their owners consent to receive notice by email in lieu of U.S. mail.

Associations that do not have a records retention policy or rules addressing records retention should create such a policy or adopt written rules governing the method of records retention and the time period during which such records must be retained. Additionally, associations should consult with their management professional and/or review their management contract to confirm whether the manager is tasked with handling the document inspection process. Finally, associations that do not have a written records inspection policy should create such a policy to clarify procedures and obligations, especially in relation to contractual obligations of a management company.

HB 59:

PROVISION OF HOMEOWNERS' ASSOCIATION RULES AND COVENANTS CHAPTER NO. 2024-202, LAWS OF FLORIDA *Effective Date: July 1, 2024*

Summary of the Law:

Revises Section 720.303 to require homeowners' associations provide every existing member of the association with a copy of the rules and covenants by October 1, 2024, and to require an association provide new members with copies. The Bill provides that an association may comply by either posting digital copies on the association website or providing hard copies. If the association determines to post copies on the website, it is required to send notice to the members indicating that copies are available on the website. The notice must be sent electronically to those members who have previously consented in writing to receive notice via email and by mail to the member's mailing address in the official records of the association if they have not previously consented to receive electronic notice. If an association's rules or covenants are amended, the association must provide every member with an updated copy of the amended rules or covenants. An association may adopt rules establishing standards for the manner of distribution and timeframe for providing copies of updated rules or covenants.

Impact Analysis:

Homeowners' associations are responsible for providing existing members and all new members with copies of rules and covenants, and all amendments to the rules and covenants, in the manner required by the new law. While sellers remain responsible for disclosing documents to buyers, homeowners' associations are now required to take on the obligation as well.

Compliance and Best Practices:

Existing Rules and Covenants

- 1. By October 1, 2024, provide copies of rules and covenants to all existing members.
- 2. Provide copies of rules and covenants to all new members.
- 3. An association may post the rules and covenants on its website <u>and</u> send notice to each member via email (if the member has consented to receive notice via email in lieu of mail) <u>and</u> by mail to the member's mailing address (if they have not consented to receive notice via email) indicating that the documents are posted,

<u>OR</u>

4. Mail the rules and covenants to members at their mailing addresses in the books and records of the association.

Amendments to Rules and Covenants

- 1. Adopt rules concerning the required manner of distribution and timeframe for providing copies of amended rules and covenants at a properly noticed board meeting, <u>and</u>
- 2. Provide copies of all amendments to rules and covenants to members in the manner and timeframe required by the rules regarding the distribution of amendments to rules and covenants.

CS/HB 293: HURRICANE PROTECTIONS FOR HOMEOWNERS' ASSOCIATIONS CHAPTER NO. 2024-205, LAWS OF FLORIDA Effective Date: May 28, 2024

Summary of the Law:

The Bill creates new Section 720.3035(6) to prohibit homeowners' associations from denying applications for the installation, enhancement, or replacement of hurricane protection by a parcel owner which conforms to the specifications adopted by the board or architectural, construction improvement, or other similar committee of the association, although the board or a committee may require a parcel owner to adhere to an existing unified building scheme regarding the external appearance of the structure or other improvement on the parcel. The Bill requires the board or a committee to adopt hurricane protection specifications, which may include the color and style of the hurricane protection products and other factors deemed relevant by the board. Requires the specifications to comply with applicable building code. "Hurricane protection" is defined in the Bill to include roof systems recognized by the Florida Building Code which meet ASCE 7-22 standards, permanent fixed storm shutters, roll-down track storm shutters, impact-resistant windows and doors, polycarbonate panels, reinforced garage doors, erosion controls, exterior fixed generators, fuel storage tanks, and other hurricane protection products used to preserve and protect the structures or improvements on a parcel governed by the association.

Compliance:

Associations should act quickly to develop code-compliant hurricane protection specifications that ensure uniformity within the community while allowing members to protect their property. Written specifications for hurricane protection must be adopted at a properly noticed board meeting. Specifications should include style, color, appearance, ratings, and any other factors deemed relevant by the board or an architectural committee. The law provides that associations may require a parcel owner to adhere to an existing unified building scheme regarding the external appearance of the community.

Best Practices:

It is recommended that the board adopt specifications for each hurricane protection product listed in the statute, make reference to preserving the existing unified building scheme of the community, and provide within the specifications that no other hurricane protection products will be permitted within the community if the board does not wish to allow other hurricane protection products.

MISCELLANEOUS BILLS THAT PASSED

CS/SB 382: CONTINUING EDUCATION REQUIREMENTS CHAPTER NO. 2024-189, LAWS OF FLORIDA Effective Date: Except as otherwise expressly provided, July 1, 2024

Summary of the Law:

The Bill amends *Florida Statute* 455.2124 to exempt licensed members of a myriad of professions from continuing education requirements. It provides that any community association manager with an active license, who has held a CAM license for ten continuous years without a disciplinary record, is no longer required to complete any continuing education coursework to renew their license. Grants regulatory bodies with emergency rulemaking authority to effectuate the CEU exemptions and requires provision of a distance learning option to satisfy licensing education requirements.

Impact Analysis:

This change in the law will decrease the number of experienced managers participating in education programs. Associations may want to ask about a manager's participation in education programs when interviewing managers and management companies and require in an employment or management contract that certain education be maintained.

HB 799: EASEMENTS AFFECTING REAL PROPERTY OWNED BY THE SAME OWNER CHAPTER NO. 2024-268, LAWS OF FLORIDA Effective Date: Upon Becoming a Law

Summary of the Law:

The Bill creates new Section 704.09 to provide that an owner of real property may create an easement, servitude, or other interest in the owner's property despite the fact that the owner owns the real property. Such rights and interests created before the effective date of the law are valid unless invalidated by a court on grounds other than unity of title. The Bill provides that it is the intent of the Legislature to respect the intent of the parties to real property transactions that occurred before the effective date of the law and the parties' reliance on easements, servitudes, or other interests created by those transactions.

Impact Analysis:

The law will ensure that easements created by a developer are not invalidated based on unity of title. This includes important easements providing owners with rights and services, and supporting the community, such as access easements, utility easements, conservation easements and drainage easements.

Compliance:

There are no affirmative steps associations need to take to validate their easements under this law.

CS/HB 1049: FLOOD DISCLOSURE CHAPTER NO. 2024-215, LAWS OF FLORIDA Effective Date: October 1, 2024

Summary of the Law:

Creates Section 689.302 requiring a seller to complete and provide a flood disclosure to a purchaser of residential real property at or before the time the sales contract is executed in the specific form provided by this section.

CS/HB 1645: NATURAL GAS RESILIENCY AND RELIABILITY INFRASTRUCTURE CHAPTER NO. 2024-186, LAWS OF FLORIDA Effective Date: July 1, 2024

Summary of the Law:

This Bill adds to *Florida Statute* 720.3075 providing that homeowners' association covenants may not prohibit types of fuel sources, including liquid propane and natural gas. It also bans an association from prohibiting the use of natural gas appliances or propane appliances.

Impact Analysis:

This Bill will prevent associations from prohibiting fuel tanks and fuel storage, and prevent associations from banning gas grills, gas stoves, and other natural gas or propane appliances. However, associations may continue to impose reasonable regulations concerning the storage and use of propane and natural gas.

SB 7020: DELIVERY OF NOTICES CHAPTER NO. 2024-147, LAWS OF FLORIDA Effective Date: May 6, 2024

Summary of the Law:

The definition of "registered mail" in Section 1.01 is revised to include certified mail with return receipt requested and any delivery service by the United States Postal Service or a private delivery service that is regularly engaged in the delivery of documents which provides proof of mailing or shipping and proof of delivery. Provides that the law is remedial and retroactive.

Impact Analysis:

In the event governing documents or contracts require delivery of notices by "registered mail", the notice may be by the other methods authorized by the new law. This includes certified mail with return receipt requested and other similar delivery service that provides proof of mailing and delivery.

BILL THAT DID NOT PASS

CS/SB 280: VACATION RENTALS Vetoed on June 27, 2024

On June 27, 2024, Governor DeSantis vetoed the Vacation Rental Bill, which sought to further divert the regulation of short-term rental restrictions from local governments to the state. The current law provides that a vacation rental is a unit in a condominium or cooperative, or a single, two, three, or four-family house that is rented to guests more than three times a year for periods of less than 30 days or one calendar month, whichever is shorter, or held out as regularly rented to guests. Current law does not allow local laws, ordinances, or regulations that prohibit vacation rentals or to regulate the duration or frequency of the rental of vacation rentals. However, this prohibition does not apply to any local law, ordinance, or regulation adopted on or before June 1, 2011. Although the Bill was vetoed, it is likely the issue will be reintroduced and revisited in next year's legislative session.

The Bill permitted "grandfathered" local laws, ordinances, or regulations adopted on or before June 1, 2011, to be amended to be less restrictive or to comply with local registration requirements. Additionally, a local government that had such a "grandfathered" regulation in effect on June 1, 2011, was authorized by the Bill to adopt a new, less restrictive ordinance. The Bill revised Section 509.032 to preempt the regulation of advertising platforms to the state. It also sought to revise Section 509.013 to define the term "advertising platform" in reference to vacation rentals.

The Bill provided the division with authority under Section 509.241 to administer advertising platforms, require licenses, and issue cease and desist notices, fines, suspensions and seek penalties, including attorneys' fees and costs, for violations, and revised Section 509.261 to provide that the division may revoke, refuse to issue or renew, or suspend for a period of not more than 30 days or the period of suspension a license of a vacation rental because the operation of the subject premises violates the terms of an applicable lease or property restriction, including any property restriction adopted pursuant to chapters 718, 719, or 720, as determined by a final order of a court of competent jurisdiction or a written decision by an arbitrator authorized to arbitrate a dispute relating to the subject premises and a lease or property restriction.

Section 509.032 provided authority for local governments to require only certain registration requirements. However, any county law, ordinance, or regulation initially adopted on or before January 1, 2016, that established county registration requirements for rental of vacation rentals, and any amendments adopted before January 1, 2024, were proposed to be grandfathered in.

Section 877.24 provided that the state regulation of vacation rentals and advertising platforms does not supersede any current or future declaration or declaration of condominium adopted pursuant to chapter 718, Florida Statutes; any cooperative document adopted pursuant to chapter 719, Florida Statutes; or any declaration or declaration of covenant adopted pursuant to chapter 720, Florida Statutes.

Finally, the Bill proposed revisions to Section 212.03 to require advertising platforms or operators listing a vacation rental with an advertising platform to collect and remit specified taxes for certain vacation rental transactions.

IS IT TIME TO AMEND YOUR DOCUMENTS?

As the saying goes, change is the only constant in life. This fact applies equally to boards of directors of community associations who are tasked with operating their communities consistently with existing governing documents, even if those documents no longer fit the needs of the community or no longer comply with existing laws.

You should occasionally review your documents to ensure that they are consistent with both the existing scheme and vision of the community and the laws which apply to the community.

The general question of whether Governing Documents should be amended has no correct answer. Instead the board's investigation should consider many factors, including the following:

- The age of the Governing Documents. For instance, how many laws have been amended since the documents were created?
- 2. The existing scheme of the community. For instance, do most owners now have small children; what is the existing mix between owner occupants and investor owners?
- 3. The operation of the association. For instance, should there be more or less board members, does the quorum requirement need to change?
- 4. Do your Governing Documents have so many amendments that owners are confused as to what is the correct text?



Now is a perfect time to review and make appropriate changes, if necessary, and to get in front of some of the proposed legislative changes which did not pass this year but will come up again in the near future.

Please use our "General Amendment Checklist" on the following page to assist you in this endeavor. We suggest that you consult with your association's attorney to identify key provisions in your Declaration, Bylaws, Articles of Incorporation, and/or Rules and Regulations that should be removed or amended to reflect the current law and present needs of your association.

As always, Becker would be happy to work with your board to ensure that your governing documents are not only comprehensive and up-to-date but also ahead of the game on the issues that matter most to your community.

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IS IT TIME TO AMEND YOUR DOCUMENTS?

GENERAL AMENDMENT CHECKLIST

Gene	eral Provisions and Definitions		
	Does your Declaration define important words and phrases such as "short-term rental," "guest," and "single-family residence"?		
	Should your amendment process/procedure be amended to make it easier to pass proposed changes?		
Asso	Association Maintenance Responsibility and Owner Maintenance Responsibility		
	Does the current Declaration clearly define the maintenance responsibilities of the association and owners for such things as landscaping, shared walls, or other shared amenities?		
	Does your Declaration contain an "incidental damages" clause?		
	Does your Declaration allow for self-help procedures for abandoned or vacant properties?		
Colle	ections and Assessments		
	Does your Declaration contain language which automatically incorporates statutory changes to Chapter 720 (HOA) or Chapter 718 (Condo) ("Kaufman Language")?		
	Does your Declaration allow you to charge the highest allowable interest rate and/or late fees when an owner becomes delinquent?		
	Does your Declaration entitle you to pre-suit attorney fees and costs for collections enforcement?		
Gene	General Use Restrictions		
	Do your Governing Documents limit the type and amount of animals allowed to occupy a unit or household?		
	Do your Governing Documents prohibit smoking while on association property?		
	Do your Governing Documents regulate where and what type of landscaping is allowed on lots?		
	Are your Governing Document references to clotheslines, occupancy, car charging stations, and antennae consistent with current law?		
Byla	ws and Other Governing Document Amendments		
	Should the date and time of the annual meeting be amended to reflect updated preferences and practices regarding the same?		
	Should the number of director positions be amended?		
	Should the quorum threshold be lowered to make it attainable based on current owner participation?		
Boar	d and Member Meetings & Official Records Requests		
	Has your board adopted rules governing the frequency, duration, and other manner of member statements during board and member meetings?		
	Has your board adopted rules governing the frequency, time, location, notice, records to be inspected, and manner of inspections for official records requests?		

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Think again. Residents must obey the rules, directors must follow the law, and managers must keep it all running smoothly. **Take It to the Board** explores the reality of life in a condominium, cooperative or homeowners' association, what's really involved in serving on its board, and how to maintain that ever-so-delicate balance of being legally compliant and community spirited. Leading community association attorney Donna DiMaggio Berger acknowledges the balancing act without losing her sense of humor as she talks with a variety of association leaders, experts, and vendors about the challenges and benefits of the community association lifestyle.

If you've got a question, **Take It To The Board with Donna DiMaggio Berger – We Speak Condo & HOA!**

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Rules & Refereeing with Howard Perl

Reserve Funds & Studies with Robert Nordland

Nuisance or Necessary: Solving the "Pet" Problem with JoAnn Burnett

The Current Crisis with Florida's Real Property Insurance with Andrea Northrup, Vice President of Insurance Office of America







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WHY CHOOSE BECKER?

Becker & Poliakoff

Becker grew out of its pioneering role creating the law pertaining to the operation of common ownership housing. Many of the leading cases in the field bear the firm's name. Today, Becker has more **Florida Bar Board Certified Attorneys in Condominium and Planned Development Law** than any other law firm in the state.

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The Community Association Leadership Lobby ("CALL") prov avenue for community leaders to become engaged in the legislative process. Stay informed on key issues and help influence new legislation in Florida's Capitol.

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