

Vol. 33 • No. 8 • August 2015

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COMMON INTERESTS

STRATEGIC PLANNING

DEVELOP
PLAN

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ORGANIZE

ALSO INSIDE:
Strategic Planning for Reserves
CAI-RMC Strategic Plan
Tips for HOA Boards: Strategic Plans
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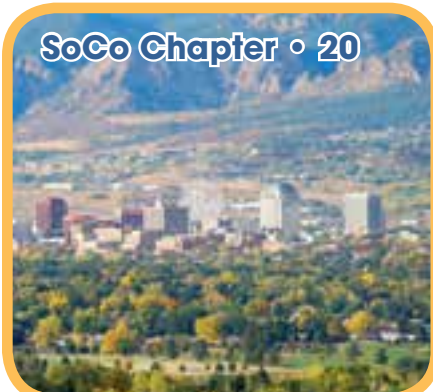
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President's Message

CAI Social Media Roundup

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CARMEN STEFU
President
CAI-RMC

I hope all of our Manager members have now settled their licensing with DORA and can continue on with all the summer projects! If you are now licensed, congratulations on this very important accomplishment!

There are a number of events scheduled for the rest of the year. I invite you to visit our website at www.cai-rmc.org to check out the calendar of upcoming events and ensure you put those events on your calendars and not miss an opportunity to network with your peers and learn even more about our industry! We look forward to seeing you at the upcoming **Mountain Conference** and **Fall Conference** and all other events in between!

With fall fast approaching, I wish you a successful budgeting and annual meeting season! ⬆

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Executive Director's Message



BRIDGET SEBERN
Executive Director
CAI-RMC

Have you ever heard that feeling good is the fuel for motivation? At the **CAI National Conference** this year, **Steve Rizzo** talked about methods for improving opportunities and using your sense of humor as a tool to overcome stress.

With that in mind, we're going to shake things up around here and have some FUN! Our Chapter has multiple events coming up that are sure to spark enjoyment and pleasure. The membership committee, for example, has planned an incredible

event with a surprise speaker at **The View House on August 27th**. Check out the flyer that's in this magazine for more information.

To fit in with feeling good and having fun, the **Mountain and Fall Conferences** will not disappoint you. The conferences have entertaining themes that we hope you get a kick out of. Don't forget to continually check the Chapter's website for more information on upcoming events. If you need more information about these conferences / trade shows, just visit the site or email Bridget at bridget@hoa-colorado.org. ⬆



"We're going to shake things up around here and have some FUN! Our Chapter has multiple events coming up that are sure to spark enjoyment and pleasure."



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Committee Corner



HOA COUNCIL

The HOA Council would like to extend a huge “THANK YOU” to **Marsha Osborn** for her years of serving as chair of the committee. We wouldn’t be the great success that we are today without her leadership and we truly appreciate everything she’s done—including those awesome cupcakes she made for our last committee meeting!

As we turn a new leaf, join us in welcoming **Jennifer Potts** as chair of the HOA Council Committee. We are confident that Jennifer is going to do an outstanding job and we’re looking forward to her successful leadership.

Our next roundtable is on **September 17th in Centennial**. This is a free event designed specifically for board members. A light dinner is served so please RSVP at cai-rmc.org. Knowledge is your takeaway.

Knowledge is power. Information is liberating. Education is the premise of progress, in every society, in every family.

—Kofi Annan



MEMBERSHIP COMMITTEE

Our group has been working diligently on our assigned tasks and we should have them ready for approval in the 3rd quarter of the year. I want to give special recognition to **Mike Lowe** with **Knott Laboratory and his team**, **Scott Douglas** with **Tag Insurance** and **Carey Bryant** with **SPCS** for all the work researching and compiling all the information for the “Season Pass” bundle for events and bringing different concepts for discussion to our group. It’s a great idea and brings added value to our members.

We are very excited about the upcoming membership mixer on **August 27 at The View House DTC**. Don’t miss this event. We have a great speaker and a spectacular venue.



PROGRAMS & EDUCATION COMMITTEE

The **P&E Committee** will resume our events in August beginning with our **Lunch & Learn on Tuesday, August 18th** at **Maggiano’s DTC** for Strategic Planning with **Rob Felix**, Regional Vice President for **Associa** & **Larry Healy**, General Manager of the **Beauvallon**. Register now, as this program is sure to fill up fast!

Our next **Advanced Leadership Series** will be held on **Tuesday, September 1st** and will be held during lunch at **Cinzzetti’s** in Northglenn. For more information on both of these events, please visit the **CAI-RMC** website.

If you are interested in learning more about the Programs and Education Committee, please call our Chair, **Melissa Keithly** at **(303)233-4646** or Co-Chair **Jenna Codespoti Wright** **(303)547-7848**. Our next committee meeting will be held on **Tuesday, September 1st**.



MOUNTAIN CONFERENCE COMMITTEE

The Mountain Conference Committee met at the end of May to discuss the outline of this year's program. Thanks to the attendance of 8 mountain managers, we are proud to announce an exciting program that will include two general sessions, and 2 separate breakout sessions that will cover 3 wonderful topics to choose from that best suits your needs. The general sessions will be: Updates on Manager Licensing in the morning, and Balancing the Work Life in the afternoon. Breakout session topics will include Preventative Maintenance Programs for Aging Communities, Successful Communication Within your Association, Best Practices for Successfully Structuring your Management Company, Preventative Maintenance Solutions for Roofs, the Pros and Cons of Renters (both long term and short term), and a session that will focus on general education for Board Members.

We are also excited to report this year's conference will be held at the Vail Marriott Mountain Resort in Lionshead on September 14. With the earlier date, we are hoping the annual snowfall that seems to disrupt our trek back home will not be an issue this year.

A golf outing will be available at Beaver Creek Golf Club on Sunday September 13 and we will continue the kickoff festivities at a Sunday evening reception to be held at the Marriott Mountain Resort.

So, ink your calendar on September 13 and 14 for another great time in Vail. As of the date of printing this newsletter, there were still a few sponsorships available. Stay tuned for dates for booth registration - just a hint, these go fast, so be sure to sign up on the date booths become available. Also, keep your eyes peeled for details on registration.

If you have any questions, feel free to contact either co-chairman, Steve DeRaddo (sderaddo@peliton.net) or Mike Kelsen (mike@aspenrs.com). Look forward to seeing you in September—the colors will be incredible this year!



EDITORIAL COMMITTEE

The end of the year is almost here and the holidays are just around the corner! I know it seems early to be talking about the holidays already, but we all know it will be here before we know it. Our November/December issue is covering the HOA of the Year and topics on Holiday shopping, customer appreciation and relationships.

Got anything interesting to share about the holidays, customer appreciation and relationships? Send your topic ideas to **Jessica Meeker** (jmeeker@benssonpc.com) by **September 15th!**



FALL CONFERENCE COMMITTEE

MAKE YOUR MOVE

The Fall Conference Committee is busy planning for the **2015 Fall Conference and Trade Show at The Curtis on November 12th**. The Curtis will be a total “switcheroo” from previous venues and fits perfectly into this year's theme.

Get ready to have some fun at the 2015 Fall Conference and Trade Show.

We have ONE Presenting Sponsorship available—who will be the lucky duck that lands this spot? Contact the chapter office for more information.



SPRING SHOWCASE COMMITTEE

Thank you very much for attending the **2015 Spring Showcase!** We hope that you not only enjoyed the showcase, but that you also learned from the educational sessions. We hope you learned something that became a part of your daily routine! Thank you for taking the time to submit feedback regarding your experience

at the event. Your comments, concerns, and compliments will help us improve next year's showcase!

It's time to start planning the **2016 Spring Showcase!** If you wish to be part of the committee please contact **Ricardo Lases** (chair) or **Mark Richardson** (co-chair) for more information.



Welcome New Members

Michael Gould

Maneesh Modi

Gordon Sichel

Tammy Walsh

Craig William Phillips, CMCA—
Copper Association Management

Kerry Ann McHugh—Copper Mountain Resort

Ryan D. Fisher—Gator Enterprises

Larry Davis—Hammersmith Management, Inc.

Maria R. Hart—Hart Property Management

Sarah Hoge—Highlands Ranch Community Association

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Strategic Planning for Reserves

*by Bryan Farley, RS
Association Reserves*



Summer...the sounds of barbeques lighting up, splashing in the pool, fireworks cracking, and...budget meetings?

Between all of the summer fun, community board members must get together to plan for their community's upcoming budget. The majority of communities are on a calendar fiscal year which means that by September-October a community's budget will be established. In these meetings, the board will discuss the possibility of increasing the reserve contributions. However, on what basis are these increases founded on? How will a community know what the reserve contributions should actually be? How can a community strategically plan for upcoming projects?

The answer is within the reserve study.

What is a reserve study? A reserve study is the art and science of anticipating and preparing for major common area repair and replacement expenses. A reserve study allows the board and management of association-governed communities to offset the ongoing deterioration of the common area components with reserve funds to ensure their timely repair or replacement, while avoiding special assessments and deferred maintenance. A reserve study is typically prepared by a credentialed Reserve Specialist (RS) or Professional Reserve Analysts (PRA).

Another way to look at a reserve study is a sort-of Carfax™ for condos. Like a Carfax™ report, a reserve study will provide the user with an overview of the important details regarding the product being evaluated. A reserve study will give you three key pieces of information, useful for annual budget planning and owners disclosure purposes. The three results are:

1. **What Components you are Reserving for**
2. **Strength of the Reserve Fund**
3. **Recommended Funding Plan**



RESERVE STUDY RESULTS

First is the Reserve Component List. While different reserve study levels of service (Full, With-Site-Visit Update, No-Site-Visit Update) differ in how thorough the reserve component list was assembled (Full = created entirely “from scratch”, With-Site-Visit = updating information from a prior analysis, No Site-Visit = update without a site visit), the reserve component list defines the reserve obligations of the community. The list of your reserve components should remain relatively stable from year to year, with the only changes being adjustments to useful life, remaining useful life, and current replacement cost.

What items belong on the component list? Per National Reserve Study Standards, a component must meet the following “Four-Part test” criteria:

1. **Common Area Responsibility**
2. **Limited Useful Life**
3. **Predictable Remaining Useful Life**
4. **Above a Minimum Threshold Cost**



RESERVE COMPONENT “FOUR-PART TEST”

Once the components are narrowed down, the reserve specialist is able to assess each individual item based on its life, appearance, and condition.

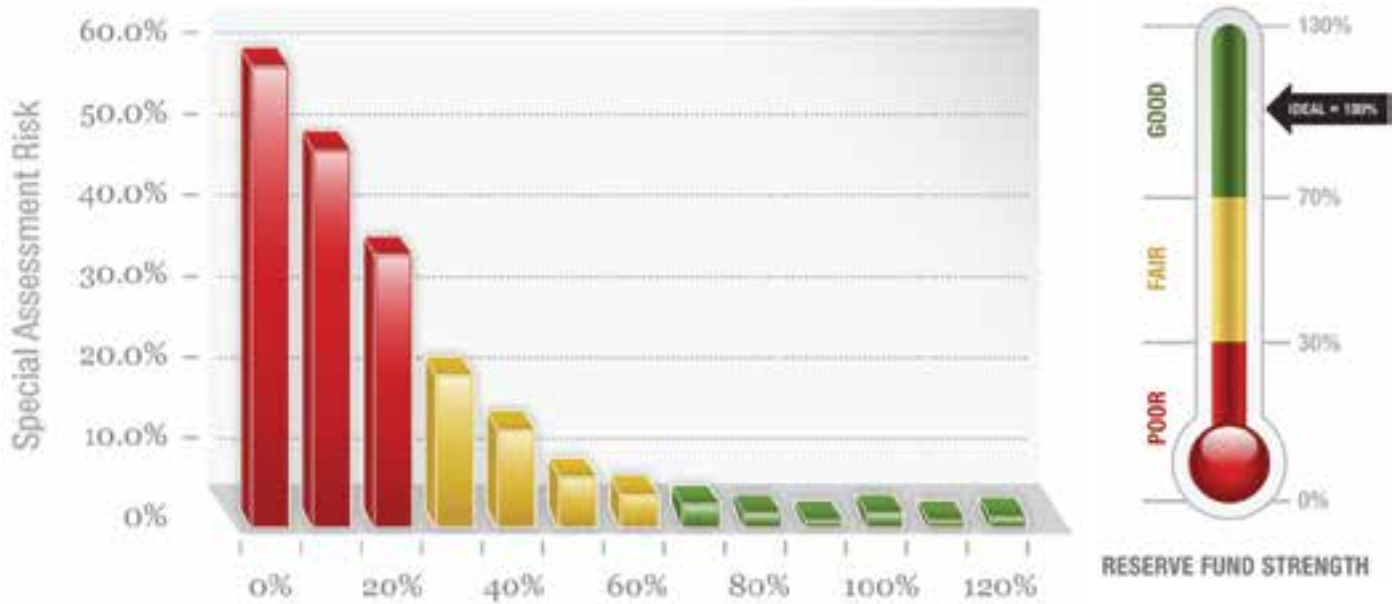
For example, let's look at a component such as asphalt. Many communities find it convenient to defer regular sealing and repairing in order save a few dollars. However, during an inspection it will be obvious to observe the effects of the lack of maintenance. Heavy cracking, major splitting, and exposed aggregate will all be evident when a street or driveway is at the end of its useful life. The same can be said about the exterior paint on a building. A fresh coat of paint will look clean, bright, and attractive, whereas an old coat of paint will most likely have signs of chipping and grime buildup.

Second is a presentation of the Reserve Fund Strength. Reserve fund strength is typically reported in terms of percent funded, the result of a comparison between actual reserve fund cash and the computed deterioration of your reserve components (called the Fully Funded Balance). While it is important for the owners to be told the actual cash balance in their reserve fund, it's also important for owners to be told the adequacy of their reserves. This is because \$100,000 or \$1,000,000 might sound like a lot of cash, but it may be woefully inadequate based on upcoming expenses projected for the community. The percent funded is a simple tool that will clearly

show an owner what type of risk he or she is in for an upcoming special assessment.

The range of percent funded is as follows:

- **0-30% Funded is the “weak” range, where special assessments are common**
- **30-70% Funded is the “fair” range, where most associations reside**
- **70-130% represents the “strong” range, where special assessments are rare**



RESERVE FUNDING PRINCIPLES

The size of your reserve contributions will cause the percent funded to trend up or down over the years, representing either a strengthening or weakening of your reserve fund position. If your community is gradually under-reserving, percent funded will decline, resulting in increased risk of a special assessment. If the community is strengthening its financial position, percent funded will increase, lowering the risk of a special assessment.

Third and finally is a recommended Reserve Contribution Rate, often called the reserve funding plan. While the first two results are disclosures, this result is a recommendation for action, designed to take the reserve fund from its current condition (result #2 above) to the community's chosen funding objective. The funding plan is therefore highly influenced by the funding objective and the current reserve fund status. Simply put, the reserve funding plan will recommend an equitable contribution rate in order to reach the funding objective. When making recommendations for the reserve contribution rate, a reserve specialist will refer to the following guidelines in order to ensure a successful funding strategy:

1. **Sufficient Cash Available at all times**
2. **Stable Contribution Rate over the years**
3. **Evenly Distributed Contributions over the years**
4. **Fiscally Responsible Contributions over the years**

So what is a “normal” reserve contribution rate? In our experience, “adequate” reserve contributions typically make up anywhere from 15% to 40% of a community’s total budget. The cost of reserve component deterioration is expensive!

In summary, a reserve study attempts to take the total reserve expenses and distill them down to a very steady deterioration rate that the community “should” be collecting from all the current owners in order to keep pace with the ongoing deterioration of the common area. This is accomplished using the three key results highlighted above.

Rather than boards’ arguing over what they would like to see the increases be this summer, suggest that they use a reserve study to strategically guide the board to financial success so that they can enjoy a family barbeque at the community pool. ⬆



“A reserve study attempts to take the total reserve expenses and distill them down to a very steady deterioration rate that the community “should” be collecting from all the current owners in order to keep pace with the ongoing deterioration of the common area.”

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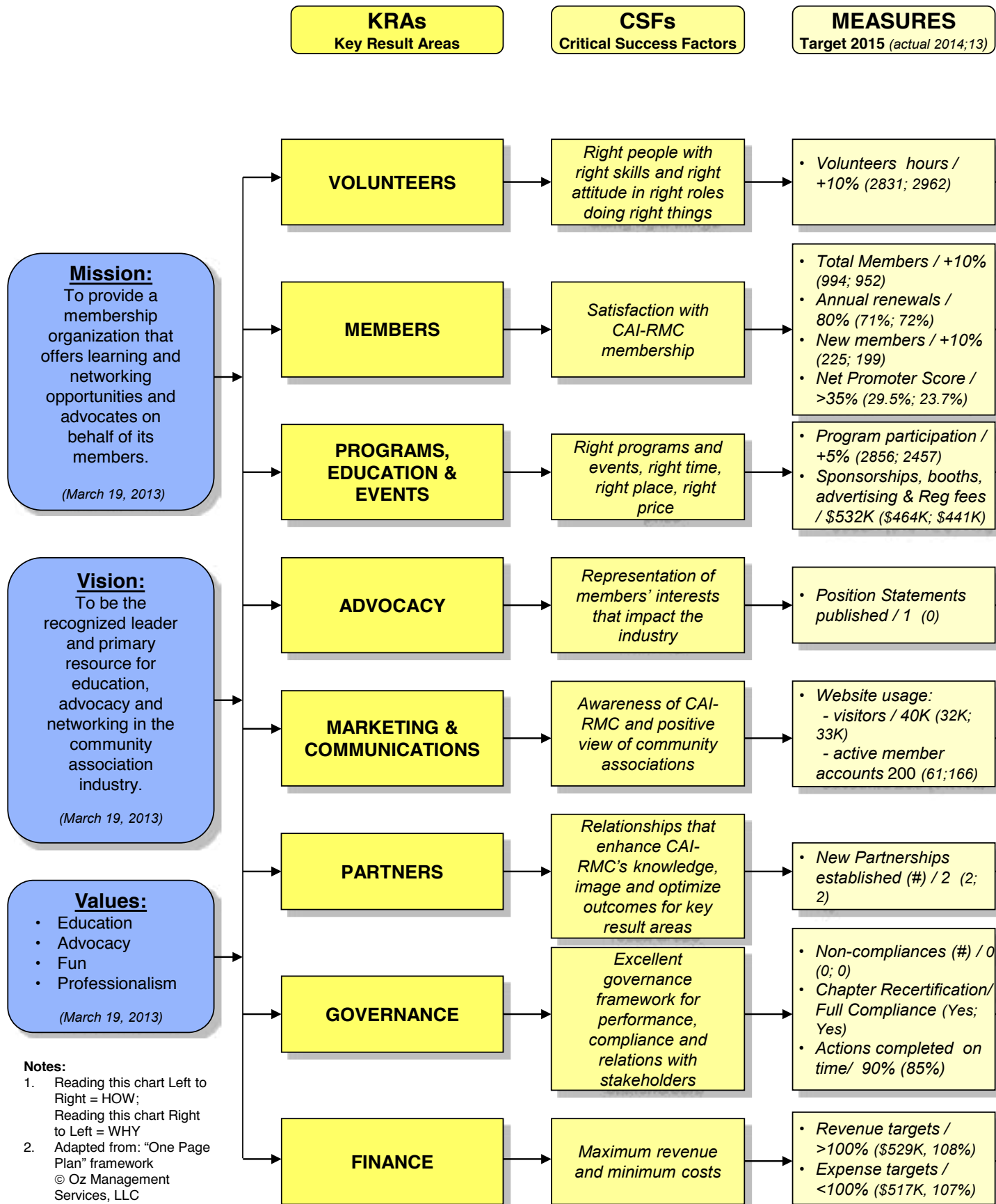
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CAI-RMC Strategic



& Business Plan for 2015

STRATEGIES

3 Years

ACTIONS 2015

1 Year Business Plan

- Recruit and retain volunteers
- Define roles and expectations
- Provide training and development
- Supervise and evaluate
- Recognize contributions

- ☐ V1. Organize for committees to introduce themselves at Spring Showcase (JH, Q1)
- ☐ V2. Create "Volunteer Wanted" advert. template for magazine & website (DH, Q1)
- ☐ V3. Use social media to push people to "Volunteer Wanted" advertisements (DH, Q1)
- ☐ V4. Clarify the role of a Board Liaison at Quarterly Board/Committee meeting (JH, Q1)
- ☐ V5. Promote and further develop the Volunteer Recognition event during National Volunteer Week April 12-18, 2015 (JH, Q1)

- Attract and retain members
- Seek member involvement
- Provide valued programs/services
- Foster professionalism
- Identify new membership services
- Leverage CAI resources

- ☐ M1. Create a "Season Pass" bundle for events (KW, Q1)
- ☐ M2. Develop a CAI-RMC Code of Ethics (CS, Q2)
- ☐ M3. Develop New Member Welcome & Orientation Process that can be implemented within 30 days of CAI-RMC receiving notification of each new member (KW, Q1)
- ☐ M4. Create "Buddy System" for new members with seasoned members (KW, Q2)
- ☐ M5. Develop recognition program for long term members (CS, Q2)
- ☐ M6. Create incentive for managers to bring their Board members (DH, Q4)

- Understand educational needs
- Respond to educational needs
- Promote CAI-RMC offerings
- Identify and promote points of differentiation from other products
- Seek participant feedback

- ☐ PE1. Host an Education Summit to plan future educational events (DH, Q2)
- ☐ PE2. Create a reverse trade show (KW/JH, Q3)
- ☐ PE3. Establish task force to research electronic and single topic training (ED/DH, Q3)
- ☐ PE4. Create Speakers Bureau & develop guidelines for speakers (GZ, Q2)

- Monitor members' views
- Advocate through CLAC
- Encourage member involvement with legislators as appropriate
- Provide regular updates to members
- Engage with CLAC & DORA

- ☐ A1. Host two legislative updates incorporating how to testify and prepare (JO, Q3)
- ☐ A2. Develop an event where local government is invited to speak/listen (CO, Q3)
- ☐ A3. Plan & hold a CLAC fundraiser (KW/DW, Q3)
- ☐ A4. Develop and implement a plan to shorten and simplify legislative updates (CO, Q2)

- Differentiate CAI-RMC
- Communicate proactively
- Anticipate issues and responses
- Provide timely, appropriate and cutting-edge information
- Create low-cost advertising opportunities

- ☐ MC1. Enhance website to be more informative & user friendly at all levels (ED, Q2)
- ☐ MC2. Publicize all facets of CAI – local, national, and committees (DH/JH, Q1)
- ☐ MC3. Develop plan to create an advertorial on CAI information for the public (CK, Q1)
- ☐ MC4. Conduct training program on how to use social media (CK, Q2)
- ☐ MC5. Establish designated social media liaison to M&M from each committee (CK/DH, Q1)

- Establish & strengthen partnerships
- Find common ground & work together
- Build relationships

- ☐ P1. Develop plan to partner with & educate realtors, developers, and city officials (GZ, Q1)
- ☐ P2. Evaluate costs & benefits of CAI-RMC having membership with BOMA, HBA, AAMD, NAR, & MMC (TW, Q2)
- ☐ P3. Analyze member needs and programs & events offered for metro, northern metro, and mountain areas against the size of the membership in each region. Make recommendations for possible improvements (TW, Q3)

- Maintain Board's effectiveness
- Comply with CAI Bylaws, policies, practices and procedures
- Mitigate risks
- Maintain organization's efficiency & effectiveness
- Improve connections with stakeholders

- ☐ G1. Modify committee charters to hold members accountable for attendance and participation in meetings (TW, Q1)
- ☐ G2. Conduct & promote quarterly meetings of Board and Committee Chairs (ED, Q1-4)
- ☐ G3. Create Action Item List within 48 hours of Board & Committee meetings (ED, Q2)

- Increase revenue
- Contain costs
- Increase economies of scale
- Manage contracts effectively

- ☐ F1. Review fees & charges for programs and events at Education Summit (JO, Q2)
- ☐ F2. Evaluate feasibility of selling magazine to non-members (JO, Q3)
- ☐ F3. Develop proposal to create and merchandise a range of CAI-RMC swag (JO, Q2)
- ☐ F4. Develop and implement plan to review each contract with CAI-RMC (CS/TW, Q2)
- ☐ F5. Advocate for lower cost membership for CAVLs (CS, Q2)
- ☐ F6. Investigate feasibility of subscriptions for online classes (DH, Q2)

Mark Your Calendars for August 27th!

Mark your calendars and celebrate summer at the next, exciting Mixer event. The next **Membership Mixer** is on August 27, 2015. Keeping in line with the spirit of ingenuity concerning location, our venue of the next mixer is the **View House, Denver Tech Center location, at 7101 S. Clinton Street**. This venue screams “good times.” As always, the event will combine education, great networking, and loads of fun.

This particular event is designed to really promote R&R. We have a mystery speaker that we will reveal closer to the event, who is not only a motivational speaker but a true comedian. Come ready to laugh. This event is designed for all of you who work at an incredibly fast pace, through constant conflict and endless deadlines, while bringing your A-game no matter what. Come reward yourselves for all your hard work and devotion by attending this terrific event, designed for your rejuvenation. Our speaker will

talk about the not so obvious benefits of being happy at work, such as improved performance and leadership, and will use laughter as his primary emphasis. As many of us know, laughter is the best medicine to remedy work exhaustion.

After the presentation, our mixer will move outdoors to an incredible patio environment with an actual backyard, where games, such as cornhole (a/k/a tailgate) will be available. The price for this event is \$30 for Business Partners, and \$15 for Community Managers and CAVLs, and includes food and two drinks. There are different levels of the restaurant to explore for those who wish to visit further after the event. Please be sure not to park at the neighboring Landry’s restaurant or Purple Ginger.

Rejuvenation and networking together in one great afternoon: now that is must-attend event! We look forward to seeing you, decompressing, and celebrating membership in CAI-RMC. 🏠



THE FUTURE IS COMING ➡

➡ **MONDAY SEPTEMBER 14**
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Monday, September 14, 2015, 8:00am – 4:30pm
at the Vail Marriott Mountain Resort
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ATTENDEE REGISTRATION

or **REGISTER ONLINE** at www.cai-rmc.org

Registration includes:

- Continental Breakfast
- Educational Sessions
- Reception (Cash bar & free appetizers)
- Lunch
- Trade Show

If registering multiple attendees with one payment, please attach list of names (and certifications, if any) and provide primary contact information on registration form.

The CAI-RMC Mountain Conference is approved for **4.0 hours of Continuing Education Credit** for Community Managers.

Name (and certification, if any) _____
Company or Association Name _____
Address _____
City _____ State _____ Zip _____
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Early Bird Special (Register before Friday, September 4 and receive the following rate!)

_____ Members @ **\$75 each** \$ _____
_____ Non-Members @ **\$90 each** \$ _____
All registrations after September 4th
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TOTAL ENCLOSED \$ _____

PAYMENT IS DUE WITH REGISTRATION

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For questions or more information: Visit cai-rmc.org or call 720-943-8606

CONFERENCE OVERVIEW



MORNING GENERAL SESSION:

DON'T GET STUCK IN THE PAST—STEP INTO THE FUTURE WITH MANAGER LICENSING UPDATES:

The morning general session will provide important and timely DORA and legislative updates. If there were ever a year to understand what's happening on the legislative front, this is the year. It isn't 1955 anymore!

MORNING BREAKOUT SESSIONS:

AGING COMMUNITIES: Your older building seems to be sagging—Is there a problem with earth's gravitational pull or are things just getting a little heavy? Our guest speakers will discuss how older communities, even with deferred maintenance and inadequate reserves, can age gracefully into the future.

SUCCESSFUL COMMUNICATION WITHIN COMMUNITY ASSOCIATIONS: Who you calling butthead...butthead? The 2014 HOA of the Year, River Valley Ranch Master HOA, will be leading an engaging discussion about how their community positively functions and operates. Guest speakers will give tips and tricks for you to implement in your own associations.

TRAITS OF A SUCCESSFUL MANAGEMENT COMPANY THAT HELP YOUR ASSOCIATION EXCEL: If you put your mind to it, you can accomplish anything. But success doesn't come to those who live in the past. It takes strategic, forward thinking and a good team to back you up. Our guest speakers will offer compelling strategies and philosophies to help you be the best you can be, no matter what you do.

AFTERNOON BREAKOUT SESSIONS:

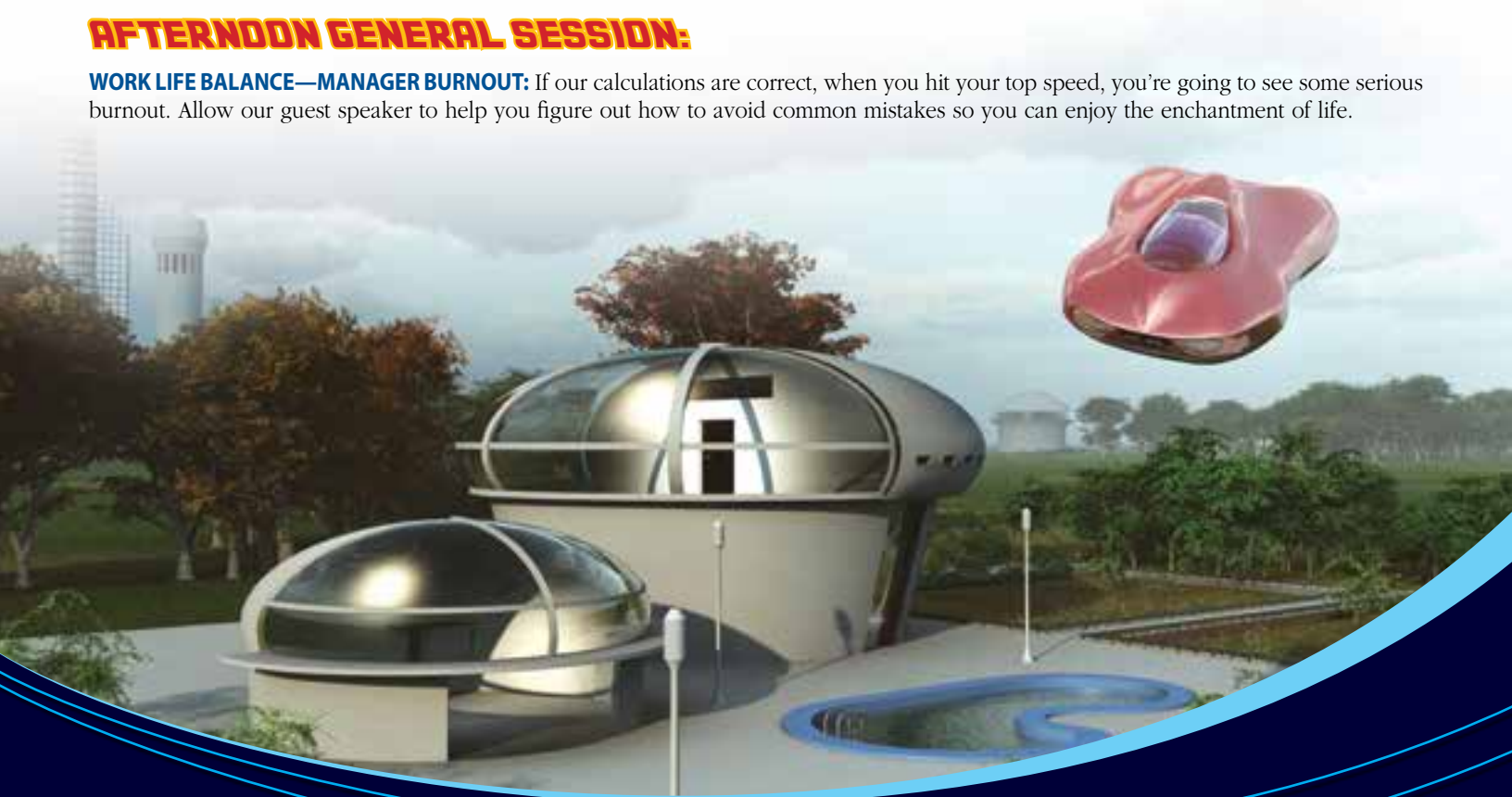
ROOFING SOLUTIONS—PREVENTIVE MAINTENANCE: They way we see it, if you're gonna do something, why not do it right? Our experts will thoroughly discuss the process of choosing a qualified roofing contractor, the needs of your community and how they effect your plan of action, and suggestions for choosing the right people to make your team.

RENTERS—PROS and CONS: Why don't you make like a tree, and get out of here? In this lively discussion of renting in resort communities, we'll discuss the pros and cons of short term and long term renting, the common and uncommon rules and regulations of an association, ADA trends, and of course how pets play into all of this.

BOARD MEMBER EDUCATION: History isn't going to change—but you can certainly help the future! Empower your board through education. How to educate Board Members as to their duties and responsibilities. How to run an effective Board Meeting.

AFTERNOON GENERAL SESSION:

WORK LIFE BALANCE—MANAGER BURNOUT: If our calculations are correct, when you hit your top speed, you're going to see some serious burnout. Allow our guest speaker to help you figure out how to avoid common mistakes so you can enjoy the enchantment of life.





EVENT SCHEDULE

- | | |
|----------------------|-------------------------------------------------|
| 8:00–9:00am | Continental Breakfast |
| 9:00–10:00am | Morning General Session |
| 10:00–10:30am | Break in Exhibit Hall |
| 10:30–11:30am | Educational Sessions |
| 11:30–1:00pm | Lunch in the Exhibit Hall |
| 1:00–2:00pm | Educational Sessions |
| 2:00–2:30pm | Break in the Exhibit Hall |
| 2:30–3:30pm | Afternoon General Session |
| 3:30–4:30pm | Closing Reception and
prize drawings |



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Tips for HOA Boards:

Making HOA Strategic Planning Work



*by Douglas Gilbert, President
Castle Pines North HOA #1, Colorado*

Over the past decade plus of serving as a board member and president of a suburban homeowners' association with around 425 homes and also as an officer of an umbrella HOA of around 3,500 homes I have seen several strategic plans come and go. Most were relatively complete and followed the various cookbook recipes for effective plans including attempts at mission/vision statements, SMART goals, priorities, etc. Most, however, were not fully implemented and some were forgotten with the inevitable turnover of HOA board membership. Some of the least detailed and simple plans were implemented and had a positive impact on the community. What was the difference?

My experience comes from over a decade of board service and seeing a separate urban housing development transform from having one gas station to incorporating as Colorado's newest city. Through this experience three key themes have stood out as foretelling the success of any strategic planning effort at the HOA

level. The first, and by far most important, has been a relentless practice of frequent and meaningful communication. The second is the use of data-driven management and the third is meaningful community events.

Meaningful Two-Way Communication

What most strategic planning formulas or template approaches fail to address are the nuances of frequent and meaningful two-way communication with homeowners. Some questions to ask and answer in this area include the nature of the homes, the types of residents and families, education levels, average income, and occupations. Although none of those questions seem at first blush related to the success of a strategic plan, the answers are crucial.

A fully elaborated corporate-style strategic plan can represent wasted effort in a community where the complexities of the business world are unknown. Getting the plan right from the homeowner

perspective depends greatly on whether it is understandable. The only way to “get it right” is to understand the needs of the homeowners.

A place that many boards get it wrong is assuming that one-way messages from the board in the form of newsletters or emails are enough. In addition, a range of listening methods are needed. Those methods can range from community meetings to annual surveys to tracking homeowner communication with the management company. As consumers have become over surveyed and have less free time, meetings and surveys have lost their ability to tell the story. The use of operational data gathered by the client management systems of HOA management companies represents a better and more real-time indicator of the pulse of the community.

Data-Driven Management

Basing the management of the HOA on data-driven approaches allows the board and the homeowners to have a common understanding of what’s important. Tracking and trending data in three areas is a bedrock of a good strategy: operational finances, reserves, and operational metrics. A strategic plan is meaningless without reliable financial statements available to the board and homeowners at every meeting.

Issues of funding and use of reserves is an area of frequent tension in HOAs. A complete and current reserve study with inventories of key assets, useful lives of the assets, and funding projects for replacement will tell quickly if any strategy is a wish or a real plan.

One area often missed is operational metrics. For example, our HOA for years debated the value of having a swimming pool

that was open only three months of year due to the high altitude climate of our neighborhood. Some wanted to fill in the pool as a community garden while others wanted to create spa pool. The two sides could come to consensus only when we had accurate usage statistics developed by something so simple as counting the number of people in the pool at the top of each hour.

Meaningful, Inclusive Events

Often HOA boards get lost in the details of managing buildings, grounds, and contractors. The board forgets that a HOA is a community of people. It is the engagement of the residents that will make or break any strategy.

A technique that has been successful in our community is to find social events that are both meaningful to residents and inclusive of a broad cross-section of the community. The types of events vary by community. In our case we have found that an all-ages picnic around July 4th is the most inclusive. We also include additional events to celebrate summer including parties to open and close the pool and children’s events around the Winter holidays.

Conclusion

With the use of professional HOA management firms, strategic plans seldom fail to contain critical plan elements. Even the best developed plan can be meaningless if not understood or accepted by homeowners. The tips described above provide three ways that a HOA board can help ensure that it develops the right plan and can make the plan a reality. ⬆



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CAI SoCo Chapter

Learn more about us from a few
“Outsiders” who know us best!



By Ashley Douglas and Jodi Walker

Greetings, CAI Rocky Mountain Chapter, from your friends in the Southern Colorado Region! We are so excited to have the opportunity to share what's going on in our world.

While brainstorming what we wanted to say in this article we first thought we wanted to tell you all about the exciting things happening this summer. Events like the Sky Sox BBQ and Baseball event where nearly 300 of our members and their families stepped out of the office for a night of fun, fireworks, and building community at the ballpark. We also thought about mentioning our incredible Golf Tournament that breaks attendance and income records almost every year for 18 years. Then we thought, how about we tell about the amazing all-day education that is provided to our Manager and CAVL members each year at Law Day? Last, but not least, we thought we should mention how our monthly Educational Programs consistently bring in over 100 attendees spanning the spectrum of Managers, CAVLs, and Business Partners. Better than

us telling you, we thought it far more credible to let you hear what others are saying about us. Those who are on the outside, looking in. We have five such people here, read what they have to say:

Claudia Douglas is the mother of Ashley Douglas at Reconstruction Experts. Claudia says: “I have watched Ashley contribute to CAI SOCO over the past 6 years and she has truly enjoyed her time with this organization. She began with Reconstruction Experts as a young professional, and I’ve enjoyed watching her grow as a businesswoman with RE and CAI. She’s always been a leader, but CAI SOCO has offered her the opportunity to develop her skills even more within a great group of professionals.” Wow, Claudia thanks. We can always trust the words of someone’s mom.

Tom Helgeson is with Edward Jones Investments. His wife Julie spoke of his recent health problems. “Tom had never really been sick before we discovered he had a lump on his neck last summer when we were in Maui. He was diagnosed with cancer. Things had been going well until a recent set back, but he has a

very positive outlook and is continuing his duties as co-chair of the golf committee. He really enjoys the chapter and the people and he is looking forward to this year's golf tournament." We appreciate hearing from Julie and really enjoy Tom's amazing contribution every year to the successful golf event. We are all rooting for you, Tom, for a full recovery!

Stephanie Burnett is with Emerald Isle Landscaping. Stephanie's close friend Meghan Quinn from USA Triathlon says, "Stephanie's commitment to serve on CAI SOCO's hospitality committee was not taken lightly and I have watched her follow through. She has worn many hats: registering guests, encouraging membership, and coordinating meetings. She switched companies but has continued to make CAI SOCO her place to give back." It was to hear the confirmation that when Stephanie switched her job; her loyalty to CAI SOCO didn't change. We see that a lot in CAI SOCO.

Gayl E. is the Treasurer of a ten-year-old HOA in south central Colorado Springs. She just found out about CAI SOCO and while considering membership, she came to Law Day. "I never knew CAI SOCO existed until last month when I was searching the web. What a relief! Right away, I received an email from Jodi, the CED, inviting me to Law Day. I knew at the first session that this was the organization for me. I learned so much at this Law Day and I hope that each of our HOA board members will join me at the October 2015 board member training. I can already see the benefits for my other HOA board members and homeowners to become members of CIA SOCO." We couldn't ask for better feedback. One more:

Darla Scheuerman is the wife of Jack Scheuerman of Scheuerman Law Office, PC. "We have always been very active in giving back to our community and CAI SOCO is just one of the great ways we do that." Jack knows the managers are at the events to gain education, experience, and problem solving with their colleagues. We make it fun for them believing "the person who can bring the spirit of laughter into a room is indeed blessed." We adore children, obviously with five girls of our own, and we think it is absolutely key to entertain them at CAI's annual Sky Sox Baseball event. The balloonist was extraordinary this year! What a great family time, even for our grown children! We also know the necessity of rest and relaxation for anyone working in this field, what better way to do that than with a glass of wine, a smile, and a little solitude. That is why we gave away wine with a funny label at the Annual Law Day. CAI is a great place to connect and bring the CAVLs, managers and their families a little bit of TLC." We thank Darla for explaining why Jack does what he does for CAI SOCO.

We'd like to thank our "Outsiders" for taking time to contribute to this article and we hope their feedback gives you a better look at CAI SOCO. The Southern Colorado Chapter Board and Committee Members work hard to build into the existing success of the HOA industry. They do this by educating and supporting the managers, business partners, and CAVLs on a daily basis. They do this by being themselves and their family and friends enjoy watching them. We welcome you to join CAI Southern Colorado. as a multi-chapter member of CAI. ⬆



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Mountain HOA & Condominium Management

The Steep and the Deep

By Barbara Lucks

Colorado manager licensing and a plethora of recently enacted HOA legislation has impacted every manager reading this article. For mountain resort area managers, increased statutory compliance adds to a list of special challenges these professionals have faced for years.

I managed high-end slopeside condominiums in one of Colorado's premier ski resorts for 23 years. Since my retirement from hands on management, I've served as an HOA educator and bookkeeper.

The Denver manager who is trying to refine his or her specific responsibilities into a meaningful job description would laugh at the standard job description for mountain managers. It's just three words. "Whatever it takes."



The Denver manager who is trying to refine his or her specific responsibilities into a meaningful job description would laugh at the standard job description for mountain managers. It's just three words. "Whatever it takes."

I may have come to work in business dress and heels, but my locker was always stocked with jeans and a sweatshirt for the inevitable day when housekeeping demand exceeded available staffing. Rubber boots were always under the desk in case we needed all hands available to hack out a diversion trench to keep rapid snowmelt or heavy rain from flooding lower level units.

Managers of resident occupied communities as well as second home and investment communities in the mountains continually battle the ravages of the weather as well as the buffeting of seasonal and boom/bust economies. These challenges remain unchanged by legislative trends.

- Extreme environmental conditions, including intense ultraviolet light concentration, high winds and the leverage action of freeze/thaw cycles significantly shorten the useful life of many major components from paint jobs to sidewalks. This makes both routine maintenance and meaningful planning for capital replacement more challenging.
- A shortage of skilled trades in many mountain communities renders the concept of the "competitive bid" almost meaningless. A manager is lucky if the vendor shows up as scheduled to do the job, least of all carves out time to bid a job he may not get.
- The mountains have a unique employment culture. Extreme difficulty in finding affordable housing, long commutes on icy roads and the variability of seasonal employment leaves workers stressed and financially insecure. Those idyllic Rocky Mountain High postcards quickly tatter in the face of the hard realities of surviving in resort economies. Multiple jobs are often necessary just to make ends meet. Employee turnover can be very high.

To quote one mountain condominium manager, making it all work is "very much like living in the islands." I'll add that it's like living in the islands while watching someone else enjoy the beach while trapped behind a desk for 50 hours a week.

While resident-occupied HOA's and COA's may have operational profiles similar to any resident occupied property, the story is entirely different for second home and investment communities. This is the resort profile.

The fundamental challenges for mountain resort community managers is compounded by boards comprised of very busy and very high-powered people who don't live in the area. These boards do not understand the local culture.

Further, these board members often have set ideas about how things should work, and these ideas are usually founded in a corporate culture that is served by a highly competitive workforce in population-dense areas. These boards do not understand that a manager can't secure three bids on a \$2000 job, or that the wages necessary to attract quality staff may be twice as high as comparable positions in Chicago.

Board meetings can be hard to schedule due to distance and directors' heavy commitments. Phone meetings are a poor second to in-person participation. Even when a quorum is physically on-property, directors understandably value their vacation time over board work. Finally, boards may simply refuse to act on touchy issues, fearing social or business repercussions. This often leaves the manager in the position of having to step outside prudent boundaries when something must be done but the board cannot or

will not act. Licensing may help to fortify these boundaries, just as licensing in other professions provides the professional a polite but firm way to say “no”.

Boards comprised of affluent and successful people frequently regard Colorado HOA laws as more nuisance than help, treating them as guidelines at best. Many of their managers would agree. One manager described the new laws as an attempt to “swat flies with a 30-06”. Many of their attorneys also agree and describe the rash of new legislation as “wildly overreaching”. Simply put, the laws don’t really address the day to day realities of juggling service to the homeowners with the way business must be done in the mountains.

Since many resort homeowners view their property primarily as an investment rather than a home, the homeowners who serve on their association boards often find it hard to reconcile their fiduciary duty with their personal investment strategies. In the interest of holding the property with a minimum of cash outlay, prudent reserve planning may be rejected, even when it’s apparent that a crushing special assessment looms in the future. “I’ll have sold by then” is the argument.

When it comes to manager licensing, two managers I spoke with described the state legal test as harder than expected while at the same time lacking relevance to day to day challenges. One commented that the legal test focused on tasks that any reasonable board is going to refer to an attorney (e.g. dissolving the association), while ignoring the stuff that managers actually do every day. Both commented that the general test was far more relevant and a

better measure of the core competencies that manager licensing is designed to assure.

Whether you feel that manager licensing is a help or a hindrance, most people agree it will increase costs both in the initial licensing and the ongoing education and insurance requirements. It’s too soon to say whether the rigor of obtaining a license will create a shortage of managers. If that indeed plays out, the old rule of supply and demand is likely to further increase costs to residents of mountain communities.

When I was a COA general manager, I would personally have welcomed licensing if for no other reason than to have accountability to a set of standards more thoughtful and consistent than the vagaries of turnover boards.

When one board member wanted to ban short term rentals to people of a particular nationality (due to damage to his rental home by people from that nation), it was handy to explain that the Federal Fair Housing law would not allow us to do that. There is also a great deal of value in time-tested best business practices. All board members in all associations are experts in some area of life or business, but few are experts in the governance of common interest communities.

Manager licensing and expanded legislation may provide a defensible argument for managers trying to persuade boards to do the right thing. However, manager licensing is not going to solve the unique problems faced by mountain communities. That takes skills no test can measure. ⬆



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CAI-RMC EVENT CALENDAR

AUGUST

18
Tue

Lunch & Learn
Maggianos DTC •
Greenwood Village

27
Thu

Membership Mixer
The View House (DTC) •
Centennial

SEPTEMBER

1
Tue

Association Leadership Series
Cinzzetti's • Northglenn

2
Wed

Manager's Breakfast
LePeep • Denver

14
Mon

**Mountain Conference
and Trade Show**
Vail Marriott Mountain Resort • Vail

17
Mon

HOA Roundtable Event
Centennial

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