

COMMUNITY connections

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Q3 | 2023

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SOUTHERN COLORADO
CHAPTER
community
ASSOCIATIONS INSTITUTE



CALENDAR OF EVENTS

JAN

10 Education Luncheon:
January Jumpstart

FEB

14 Education Luncheon

MAR

14 Education Luncheon
16 New Member Breakfast

APR

11 Education Luncheon
21 Bowling Tournament

MAY

09 Education Luncheon
11 Business Partner
Sponsored Happy Hour –
date to be confirmed

JUN

9 Family Event
(Carnival & Movie Night)
13 Education Luncheon
17 CLAC Trivia (South)

JUL

18 CLAC Trivia 2023
21 Annual Golf Tournament

AUG

7 First Annual SoCo Expo
8 Education All Day Law Day

SEP

12 Annual Meeting &
Education Luncheon
20 7th Annual CLACsic
Golf Tournament
22 Top Golf Tournament

OCT

10 Education Luncheon

NOV

14 Education Luncheon

DEC

12 Holiday Celebration,
Awards, Board Installation
& Charity Donation Event

Vision & Mission Statements & Values

Vision

To be the recognized leader and primary resource for education, advocacy and networking in the community association industry.

Mission

The mission of the Southern Colorado Chapter of CAI is to provide the resources and tools to best advance and support the HOA Community, expert service providers, and community association leadership.

Values

The core values of CAI SoCo that guide our business and culture are:

- INTEGRITY FIRST
- ETHICAL
- WELCOMING & INCLUSIVE
- PROFESSIONAL & KNOWLEDGEABLE

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2023 EDITORIAL CALENDAR

ISSUE	ARTICLES DUE	ADS DUE
Q4	15 September	15 September

All materials must be received no later than the dates listed. Materials received after these deadlines are at the discretion of the Editorial Staff for inclusion.

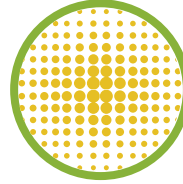
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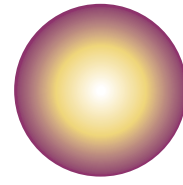
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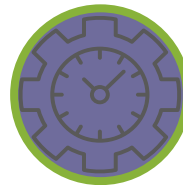
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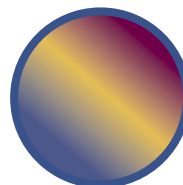
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PRESIDENT'S LETTER



TRINA RODRIGUEZ
Chapter President,
CAI of Southern Colorado

As I sit here on the eve of National Community Manager Day on June 13 and write this, I am thinking about all the great and wonderful things that Community Managers do for their Communities and how they serve them. Being a Community Manager is the ultimate form of servant leadership. We don't make the decisions, we give advice, handle the day-to-day tasks and communication all in an effort to serve our volunteer Board Leaders and the homeowners in those communities. The servant leadership style is based on the idea that leaders prioritize serving the greater good. In an HOA this means no personal agenda's and doing what is best for the entire community. How can you better yourself and in turn do better for your communities?? Let's focus on Greenleaf's 10 basic principles of servant leadership:

- **Active Listening** - One of the most important benefits of being an effective, active listener is that it allows you to better understand other people's perspectives. What exactly is that homeowner upset and complaining about? Don't listen to respond, truly hear what they are saying. Can you put yourself in their shoes and understand how they might be feeling? How can we solve their problem and how can you communicate that back to them? Which leads us directly to the next principle...
- **Empathy** - Yes, we know that homeowners will break the rules and that we are paid to enforce those rules in a clear, effective and fair manner. When they call you to complain, and you are actively listening to what they have to say, can you empathize with their situation while still enforcing the rules? Of course you can! You can be sorry that they are in the situation they are in and you can communicate that with them. "I am sorry to hear that", "I am sorry you are dealing with that" are great ways to communicate and reiterate their situation.
- **Healing** - While most of us don't think of "healing" per se when it comes to HOA's, I like to think of it as simply solving their problem. Tell them what the rule is again and ask how they think they can follow the rule or come into compliance. Is the solution presented acceptable? Can you approve it or do you need Board approval? Healing can also be helping them overcome their past and create a better way forward. Maybe they didn't have a good experience with their last HOA and they "assume" it will be same when they deal with you. Show them it doesn't have to be that way; show them we are here to serve them! You will not only solve their issue, you will create someone in the community that when others are complaining, they will tell them about their experience and how it wasn't as bad as everyone thinks it will be!

- **Awareness** - Are you out in the community doing site inspections and seeing what the homeowners are seeing? Are you aware of the issues within each community? How do they know that you are aware? I like to send out updates and eblasts as I know of things going on in the community otherwise how are they supposed to know that you are already aware and working on an issue if you don't tell them! The other thing to consider is to be aware of your actions and how you respond, talk to and deal with homeowners and any issues in the community.
- **Persuasion** - Again, not something you would normally think about when it comes to HOA's but how else do you get a budget or amendment passed beside *persuading* them with facts that it is necessary. Always stick to facts, not emotion, we are not trying to manipulate them into doing anything, we are simply presenting the facts and allowing them to decide for themselves that this is the best course of action.
- **Conceptualization** - A servant leader thinks beyond the day-to-day, they focus on the long-term. In the HOA world this is long-term projects and planning. Think about being proactive versus reactive. If you are thinking of 2023 projects in 2023 you are behind and all of those projects will be behind also! We need to look at when things were done last, how do they look and will they need updating and when. We all know that nothing moves fast in the HOA world it takes time to get a scope of work, request bids, send the bids to the Board for review and then get approval (or changes requested to the bid). Once approved and signed the work doesn't immediately get done, that only puts it on the contractors schedule which could be weeks out.
- **Foresight** - This is the ability to see the long-term implications of current actions and make informed decisions based on that vision. Think of this in terms of budgeting. What long-term projects have been decided on by the Board and how do we need to budget for those projects? For example, do all the roofs need to be redone? Do they have the money for this project or do you need to include an increase for the roofs in the next budget? Does the Board get a loan, do a special assessment or are they able to do incremental increases to cover the cost? If a community and Board do not budget properly and make good decisions now it WILL affect the community long term. Maybe not in the next few years but we have all seen and dealt with those communities with deferred maintenance and the consequences of those.
- **Stewardship** - The Board is the steward of the community. It is their "job" to take care of the community and make good business judgement decisions not only for today but also for the future of the community. The role of Managers is to supervise, advise and conduct on behalf of the Board. The definition of Stewardship is "*the careful and responsible management of something entrusted to one's care.*"

I can't think of much else as important as serving our volunteer Boards as they navigate the difficult task of all that is entailed in managing their communities where this is people's most important and costly investment, their home! I thank each and every servant leader today out there doing their best as a volunteer Homeowner Leader or Community Manager! (and we couldn't do it without our trusted Business Partners) 🏡

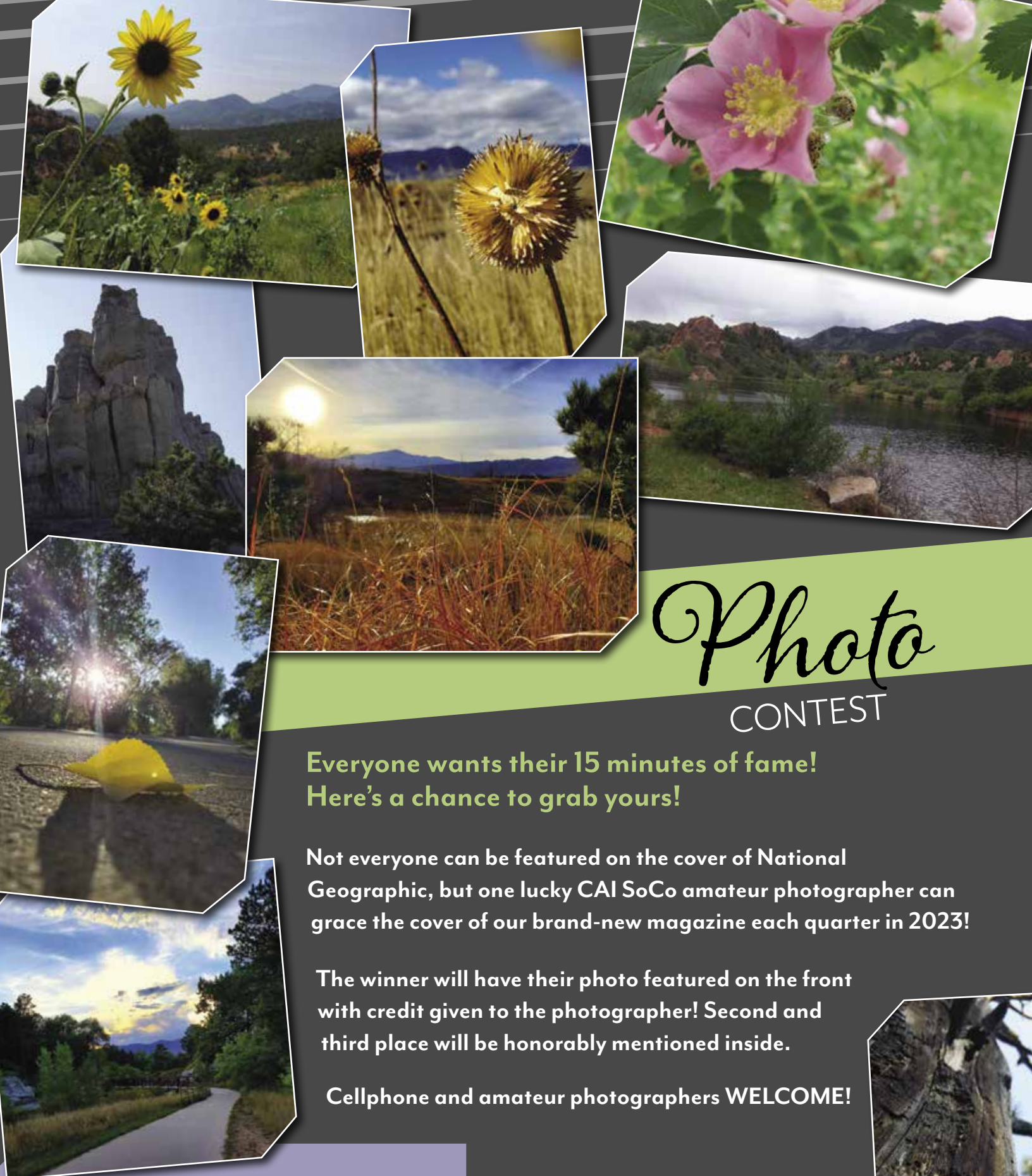


Photo CONTEST

**Everyone wants their 15 minutes of fame!
Here's a chance to grab yours!**

Not everyone can be featured on the cover of National Geographic, but one lucky CAI SoCo amateur photographer can grace the cover of our brand-new magazine each quarter in 2023!

The winner will have their photo featured on the front with credit given to the photographer! Second and third place will be honorably mentioned inside.

Cellphone and amateur photographers WELCOME!

**SEND YOUR COLORADO PHOTO TO
info@caisoco.org by September 15, 2023
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Only CAI members can compete.**

By submitting a picture, you are granting permission for the image to be published and edited for printing. Please submit only one photo (at least 300ppi resolution) with your name and approximate location the image was captured.





STEPS FOR *Success* with HOA Collections



HAL R. KYLES
Orten Cavanagh Holmes & Hunt, LLC

Based on recent legislative changes, Colorado homeowner associations have had to rethink the way they manage delinquencies. House Bill 22-1137 was signed into law in August of 2022 and imposes greater obligations and burdens on associations in the collection of delinquencies. Like any business, associations must be able to predictably budget for expenses. As assessments are the lifeblood of any HOA, when unit owners fail to pay assessments, the association can be in jeopardy of meeting its obligations. There are, however, steps an association can take to enhance its confidence that money will be available when members do not make timely payments.

Step 1: Adopt an Updated Collection Policy

Colorado requires most associations to adopt and follow a written policy for the collection of unpaid assessments. The new law requires associations to update their collection policies to comply with the new obligations and restrictions on collecting delinquencies. Any association that has not already done so, should check with their community manager or HOA attorney to verify that they have a collection policy that is compliant with current laws. An association that does not have a current collection policy is prevented from referring a delinquent account to an attorney or collection agency.

Step 2 : Familiarize and Adhere to Collection Policy

It isn't good enough to simply have a collection policy. The purpose of the policy is to provide a suitable and fair process for managing the collection of delinquencies. Failure to follow the prescribed procedures can provide unit owners with a defense in the event legal action is taken against them. For this reason, associations and their managers should be familiar with the policy and adhere to the procedures specified. Additionally, the policy is intended to provide an efficient process to manage collection of delinquencies. This purpose can only be achieved by close adherence to the process outlined in the policy.

Step 3 : Payment Plans Can Benefit HOA

The use of payment plans can be an effective means for the recovery of delinquencies. House Bill 22-1137 extended the minimum payment term from six to eighteen months. Experience has shown that the liberal use of payment plans can benefit both the association and delinquent unit owner. The Colorado Common Interest Ownership Act (CCIOA) requires associations to make a good-faith effort to coordinate with a unit owner to set up a payment plan before referring a matter to its attorney or collection agency. Entertaining requests from owners for a payment plan can create goodwill and avoid the need to seek legal action to collect the delinquency. Payment plans are intended to reduce additional collection expenses, for both the association and unit owner. For these reasons, HOA boards are encouraged to utilize payment plans. All payment plans should be put in writing and acknowledged by both the unit owner and association. In the event the owner fails to complete the payment plan, the documentation can later be used as evidence of the owner's admission of the debt. Therefore, a signed payment plan can be a valuable document for the association's attorney.

Step 4 : "Manage" the Process

As discussed, adopting and following a written collection policy is a must, but equally important is the need to manage the entire process. Here, the key issues are record-keeping and communication. One of the greatest benefits to utilizing professional management are the accounting records and ledgers that can be generated with the use of industry leading software. Few things can cause a bigger problem than the failure to maintain accurate unit ledgers. This is especially true if the situation ends up in front of a judge. Having a professional community manager is likely to enhance the association's success in collecting delinquencies. Of course, not all associations require professional management, depending on the association's size and location. In most cases, however, having a dedicated individual (or individuals) whose primary responsibility is to maintain and enforce policies will greatly enhance the recovery of unpaid assessments.

The other key aspect to managing the process is effective communication. Associations have a variety of means to communicate with unit owners – mail, email, telephone, and even text, are a few examples. Modern life and technology dictate that associations utilize those modes of communication available. CCIOA requires associations to deliver notice of a delinquency by three different means. In some cases, an association may not possess a unit owner's phone number, email address or current mailing address. Efforts should be made to obtain and periodically update an owner's contact information. The county assessor can provide the legal owner's mailing address. In the event the association receives returned mail, the envelope may provide a forwarding address or other useful information. A few minutes spent conducting a Google search may save time and unnecessary expense if the owner can be located. Indeed, the most frequent complaint I hear from owners is, "the association never talked to me." Today, associations are required by state law to exercise more than diligent effort to communicate with a delinquent unit owner.

If it does become necessary to refer an owner's account to the association's attorney, it is just as important that the association maintain open and frequent contact with the attorney. Often the association (community manager or board member) is in possession

of helpful information that can benefit the attorney in collecting the debt. Occasionally, unit owners will attempt to circumvent the attorney by communicating with the board or manager. The association's collection policy typically specifies that once a matter is referred to legal counsel all communications from the association will come from the association's attorney. Policing this part of the process can sometimes become necessary.

HOA delinquencies typically go hand in hand with the health of the local economy. When circumstances make collections challenging, successful collections can be enhanced if the association has already taken the appropriate steps – has a current written collection policy that is compliant with state law; identifies the individuals responsible for implementing the policy and managing the process; makes diligent efforts to communicate with the unit owner; periodically verifies that the association has up-to-date contact information; and finally, communicates with the association's attorney to achieve an optimum resolution. ⬆

Hal R. Kyles is the managing attorney for collections at Orten Cavanagh Holmes & Hunt, LLC. He has practiced law in Colorado for thirty years, the last fifteen in support of owner associations. He is a former Marine officer and life-long runner.

“Get Off My Property!”



SCOTT MATHESON
CAI SoCo Board of Directors

These words or the attitude that inspires them are common in every HOA. They come from one of “those” Owners who never seem content with HOA life, an Owner who seems to look for opportunities to tell you how they’ve been wronged. The actual letter below is an attempt to confront one such Owner with both truth and respect. Every Homeowner Leader and Community Manager will identify with this situation and hopefully be encouraged by the concluding remarks.

Dear Nancy,

I have given some consideration to our exchange when our crew was trimming trees on April 24. As we were trimming, you stated that we were improperly trimming your tree causing an unbalanced appearance, and you demanded that we get off your property. As things have cooled down, I believe it’s important to clarify a few points about our program for tree trimming and the structure of an HOA. And I apologize for the firm tone I took. I want to be as understanding as possible in serving Pinon Glen Owners. Please forgive me.

TREE TRIMMING

You emphatically noted that we are not arborists. It’s noteworthy that we have spent a good deal of time observing and discussing with our tree contractor, Front Range Arborists, how and why to trim tree branches. As we do our own trimming, we have continued this dialogue to make sure what we’re doing is in accordance with their guidance. Even though we do the small and medium work, we continue to interact when we use Front Range for the larger and more difficult branches as well as tree removal and replacement. They are complimentary of our work, and we are in agreement on the long-term care of our trees.

We have ash trees in the front of virtually every house in Pinon Glen, including the tree you were complaining about. These trees are relatively fast growing and need a lot of trimming. We have three basic goals in trimming all the trees and the ash trees in particular:

1. Keep them away from the roofs and sides of the houses. We don’t want the trees damaging the roofs, gutters, or stucco. They are trimmed to keep them from going over the roofs or touching the stucco walls. As you also emphatically noted your tree is unbalanced. These trees were planted too close to our houses, and they are unbalanced when we cut them back. I’m sorry but this can’t be helped.
2. Provide safe working room under the trees. We trim them high enough so that the lawn mowers don’t get hit in the head or eyes and so that there is no interference with sidewalks or driveways. The arborists also note that this raising of branches reduces wind loading and allows better airflow through the trees. It also provides a clean look throughout Pinon Glen.
3. Remove dead and damaged branches.

PROPERTY ACCESS

Demanding that we get off your property indicates that there is a basic misunderstanding of the authority of an HOA.

Usually when you buy a residential property, there are restrictions such as setbacks, easements or other documents/restrictions noted in your deed that restrict the use of the property. In buying a residence in an HOA, there are a multitude of restrictions contained in governing documents, which are incorporated in the deed to your property. These documents are the Covenants, Articles of Incorporation, Bylaws, and Rules. All properties and Owners in an HOA are legally bound by these governing documents. In that these control areas such as noise, appearance, and exterior maintenance, Owners who desire this kind of control are attracted to an HOA community. As specified in the governing documents, the elected Board of Directors is responsible for all of the activities of the HOA.

The Pinon Glen Covenants specify that exterior landscaping including lawns and trees is the responsibility of the HOA. You own the ground that includes the lawn and trees around your house, but their ongoing care is the responsibility of the HOA. You basically can't alter anything on the exterior of your house without approval from the HOA. If, however, enough Owners are unhappy with the policies of the HOA, in accordance with the Bylaws, they may band together and vote to change the membership of the Board. In Pinon Glen all members of the Board serve a one-year term and any Board member can be replaced at the Annual Meeting.

Although not a legal requirement, we try hard to be sensitive to Owner concerns and input. We try to treat all Owners with the respect that we want to receive, and we keep in mind that each Owner views this as their own home and a significant investment. You may express a verbal or written concern to the Board at any time including a monthly Board Meeting.

Whenever maintenance workers will be on their property, we try to give Owners reasonable notice via Board Minutes, eBlast Newsletters and/or text blast alerts, and we try to have the activity done at a reasonable time. We did this for the tree trimming, so unless there is some overriding issue, it's inappropriate for you to order us to leave your property. Again, even though you own it, we are responsible for maintaining it.

CONCLUSION

The Covenants require that the leadership of the HOA be exercised by Owners from within the HOA without remuneration. We are volunteers, Owners just like you. The basic attitude of all Owners toward their Board should be gratitude that the Board is willing to give the time and talent to run the HOA. In the case of Pinon Glen it is more than just running the HOA. We are a self-managing HOA and also perform work such as tree trimming, fence repair, and stucco repair that saves Owners thousands of dollars annually in assessment fees. I challenge you to find another HOA that is as openly and diligently run as Pinon Glen. However, even if it were merely mediocre, a volunteer Board is due the gratitude and support of its Owners.

Very few Owners miss this point. But when the regular interaction with someone is complaints and a disdain that professional-level service is not rendered - even though it is at Pinon Glen - there is a problem.

An HOA community is not for everyone. Rules and decisions are made that won't please everyone. Some things will be more lax than you like and some things more restrictive. Unless you can back off enough to see that this is OK, and actually something you can find ways to support and be thankful for, you may need to reconsider where you live.

I'd personally like for you to stay as a neighbor, but if you do, we deserve your support and goodwill.

I hope this conveys what I attempted to say when you closed your door on us.

Sincerely yours,

Scott Matheson, for the Pinon Glen HOA Board 🏠

Scott Matheson has been the president of a local patio-homes HOA for three years. Prior to that he had an ironically similar position with The Navigators at their Colorado Springs headquarters. He's a 1969 graduate of the USAF Academy and has an MBA from UCLA. Scott is currently a Homeowner Leader representative on the CAI SoCo Board of Directors. Thanks for all YOUR hard work on behalf of CAI!

2023 Roofing Trends



MIKE WILHELM
Holladay Grace Roofing

The roofing industry is undergoing a remarkable transformation fueled by the utilization of technology and innovative materials. In 2023, we are witnessing a wave of trends that are revolutionizing the way materials are made and the way roofs are inspected, installed, and maintained. From sustainable materials to easy-to-use technologies, these emerging trends are reshaping industry and paving the way for a more efficient, eco-friendly, and connected future.

1. Material Trends

In 2023, roofing material trends are centered around sustainability, advanced technology, and enhanced durability. Roofers and homeowners are increasingly opting for eco-friendly options that minimize environmental impact and promote energy efficiency. Recycled and reclaimed materials, such as plastic, rubber, and metal, are being incorporated into roofing products to reduce waste and offer long-lasting performance. Solar roofing is gaining momentum, with solar panels seamlessly integrated into roofing materials to generate clean energy and reduce electricity costs. Furthermore, roofing materials are becoming more durable and resilient, with a focus on impact resistance and fire resistance to withstand extreme weather conditions and enhance building safety.

These material trends in 2023 reflect the industry's commitment to sustainability, technological advancements, and longevity.

2. Solar

Solar roofing trends in 2023 are witnessing significant advancements and increased adoption as the demand for clean and renewable energy continues to rise. The integration of solar panels into roofing materials has become more seamless, allowing for a visually appealing and efficient energy solution.

One of the key trends in solar roofing is improved efficiency and affordability. Manufacturers are developing more efficient solar cells that can capture and convert a higher percentage of sunlight into usable energy. These advancements result in increased energy generation and greater cost-effectiveness for homeowners and businesses.

Additionally, solar roofing systems are becoming more versatile and adaptable to various architectural styles. Solar panels can now be seamlessly integrated into different roofing materials, including tiles, shingles, and metal sheets. This allows for a wider range of design options and a more cohesive aesthetic for buildings.

Furthermore, energy storage solutions are becoming an integral part of solar roofing systems. Battery technology has improved, enabling homeowners to store excess energy generated by their solar panels for use during cloudy days or at night. This enhances the self-sufficiency of solar-powered buildings and provides a more reliable and consistent energy supply.

Overall, in 2023, solar roofing trends are focused on increasing efficiency, affordability, versatility, and energy storage capabilities, driving the adoption of solar power as a viable and sustainable energy solution for buildings.

3. Technology

The roofing industry in 2023 is experiencing a significant transformation with the widespread use of technology, revolutionizing how roofs are designed, installed, and maintained. Advanced technologies are enhancing efficiency, safety, and sustainability throughout the entire roofing process.

One notable trend is the use of drones for roof inspections. Drones equipped with high-resolution cameras and sensors can quickly and accurately assess the condition of roofs, identifying potential issues such as leaks, cracks, or damaged shingles. This technology reduces the need for manual inspections, saving time, and minimizing safety risks for workers.

Another technological advancement is the integration of augmented reality (AR) and virtual reality (VR) in the roofing industry. Roofing contractors can use AR and VR tools to visualize and simulate roofing installations before

starting the actual work. This helps to ensure precise measurements, optimal material placements, and efficient project planning.

Furthermore, cloud-based software and mobile applications are streamlining communication and project management in the roofing industry. Roofing contractors can access project details, collaborate with team members, and track progress in real-time, improving efficiency, transparency, and client satisfaction.

Technology is playing a pivotal role in the roofing industry in 2023, enabling more accurate inspections, efficient project planning, improved communication, and enhanced energy efficiency. As these technologies continue to evolve, the roofing industry is poised to become more sustainable, cost-effective, and technologically advanced than ever before.

The roofing industry is embracing a new era driven by technological advancements and innovative materials. In 2023, we are experiencing a remarkable transformation driven by innovative material trends, solar roofing advancements, and the integration of technology. These three factors are shaping the industry in terms of sustainability, energy efficiency, durability, and enhanced performance.

Mike Wilhelm is the President of Holladay Grace Roofing. He is a license holder with the Pikes Peak Regional Building Department as well as a member of the El Paso County Roofing Association. He is active in our local community supporting local non profit organizations, Care and Share as well as Operation Restored Warrior. In his free time, he enjoys hiking, biking, skiing, camping, golfing, and going to the gym.



What HOAs are Looking for IN A MANAGEMENT COMPANY



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3.0 Management

Like any growing service-based industry, the professional management services developed for Common Interest Communities (CIC) have evolved significantly since its inception.

Initially, the needs of newly established Homeowner Associations were not complicated. With only 10,000 HOAs across the entirety of the United States in the 1970s, the basic requirements for managing these communities included mostly compliance with local, State, and Federal laws as well as the association's declaration and other governing documents. Given the newness of both the homes and the CIC concept itself, the professional services developed organically as new needs were discovered.

By 1980, the HOA model had proven to be a suitable home-building system for the US, with over 36,000 communities and ~10 million homeowners. But as initial infrastructure began aging and the association's responsibility became increasingly relevant, the professional services surrounding the industry evolved to the point that a truly new industry was born.

As these new services and demands were being established, it is important to acknowledge that the HOA model called for the election of volunteer homeowners to serve on a Board of Directors. Most commonly these volunteers were simply looking out for the best interest of their home and the well-being of their neighbors. However, volunteer Board Members typically did not have formal training or qualified experience in specific disciplines required to effectively maintain the current property while also planning for future needs.

Individuals from different but related professions soon recognized the opportunity to offer value-added solutions and a brand-new industry began its initial evolution.

This evolution included the formation of Management Companies, primarily focused on maintaining association compliance, providing daily bookkeeping services, and ensuring the property was physically kept. Additionally, Community Association Law Firms formed, and construction firms formed to work solely on HOA properties.

The young, niche industry welcomed the arrival of specialized service providers, however, the offerings were fragmented, and the burden of coordinating the specific services fell exclusively on the Associations' volunteer Board of Directors.

Today there are over 370,000 HOAs in the United States alone with over 74 million Homeowners (members). The needs and demands of HOA members and the infrastructure have increased significantly and are more defined than ever.

HOAs are now seeking to partner with proactive Management Companies who offer comprehensive, modernized services, to meet the unique demands of each community. The tools now exist to transition HOAs from simply responding to needs as they present themselves to predictable models that anticipate the current and future needs of a community in an organized and strategic fashion.

Communities that have elected a comprehensive management partner have stabilized their operations and built robust financials, thriving with previously unrecognized efficiencies. By having a single partner coordinate various discipline, volunteer Board members and community members can focus on strategic growth instead of having to educate themselves on unfamiliar matters.

At a minimum, progressive HOAs expect the following from their management partner:

1. Guide the Board to be compliant with all legal requirements

This includes complying with the State's civil code, and local statutes. In Colorado, a Management Company that is well educated on changing State Legislation and its impact on the Association's operations is a top priority for many Boards.

2. Oversee financial decisions

A reputable Management Company understands the importance of fiscal responsibility and works closely with the Board to develop a comprehensive financial plan that aligns with the long-term objectives. An experienced Manager will offer valuable insights and recommendations based on industry best practices.

3. Partner with the Board

The Management Company should understand the Board's objectives and goals and create plans to reach the Board's vision. Each Board's vision is different and when Boards have turnover, the priorities and motivations can change. A good Management Company is able to adapt to community dynamics while providing professional continuity of service.

4. Offer experience-based suggestions

Leveraging their industry experience, the Management Company should bring forward innovative ideas and best practices that have proven successful in similar Associations. This forward-thinking experience is invaluable in anticipating and addressing potential issues before they become significant challenges.

5. Providing Owner Support

Owners are a big part of the association, and a good Management Company should provide assistance to homeowners with questions about the association and homeowner accounts in a timely manner. Management Companies should also have self-service options available, so the homeowner always has access to the information they need with minimal time invested to obtain.

Over the past decade, HOA's market demands have changed significantly. Now more than ever, communities are seeking professional partners who can manage and improve their operations. Historically, HOAs have been frugal when it was time to invest in an operational partner, but today they have become encouraged to invest wisely, plan strategically and take comfort in a predictable and comprehensive model that set the community up for long-term success. ⬆

Ari Shore and **Chris Marion** founded 3.0 Management in 2021 recognizing that the HOA industry is on the cusp of a new era of management. Through the development of modernized tools, a self-service foundation and investing in a long-term strategic model on an Association-by-Association basis, 3.0 Management has quickly grown and continues to set a new standard in comprehensive association management.



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Setting Boundaries for Your



LESLIE ALVAREZ
St. Andrews
Country Club POA

These past several years have been indescribably stressful for everyone. Economic concerns after a year's long pandemic, lack of socialization, mask-wearing, and general fear and anxiety have only increased the slow erosion of kindness and empathy we have seen devolve over the past few years.

In our business, verbal and written abuse have reached new, unacceptable levels, and basic respect and common courtesy are no longer so common. We are told not to take the job personally, but it is personal. It's our livelihood. It's our reputation. It's our name. It is very hard to not take insults and rudeness personally. Our health takes a toll.

One time I lost 20 pounds in less than six months due to the stress of a position, and I have seen and experienced other managers suffering other stress-induced health issues. I believe it's time for some important behavioral changes in the industry.

We need a significant focus and shift to ensure community managers are treated with respect and courtesy. It all starts with setting reasonable boundaries for your mental and physical health. If more of us do that, we can start a movement and create real industry change for the next generation of community managers.

Here are a few boundaries to establish to maintain a healthy work-life balance:

- 1. Establish an appointment-only policy.** Many times, residents will stop in the office and demand to see the manager. They wouldn't do this to their cardiologist or attorney. Yet, with us, they have no hesitation. Establish the fact that you are a professional and require appointments. If your board opposes this concept, you can offer a schedule of "open-door" hours where walk-in traffic can access you freely.
- 2. Establish a weekly update meeting.** Oftentimes, we spend hours meeting with every director. They pop into the office for just a couple questions, and our morning is blown. This repeats itself with each director. The bigger the board, the more our week can

get blown away bit by bit. However, we can take control by scheduling a recurring weekly meeting with board members to give updates on pending projects and priorities for the week. This is not considered an official meeting. Ideal participants are the president and the treasurer.

- 3. Schedule as many board meetings and committee meetings as possible during business hours.** This may be a challenge for board members who have full-time jobs. However, when you serve on the board for a professional nonprofit organization like the United Way or Red Cross, your meetings are not at 7 p.m., and certainly are not on the weekends.
- 4. When you leave the office, leave the office.** Establish the understanding with your boards that while you are available for an emergency, you are not available for everything that strikes their fancy to talk to you about after hours. If you respond to a non emergency email after hours, you are effectively training your board to believe you will respond, and they will have an expectation as such.
- 5. Manage your email.** An organized email inbox is imperative to your success. In today's technological age, some things can be a quick phone call, text, or Microsoft Teams message. This helps to avoid bogging down everyone's emails for a quick conversation and avoids frustration and unnecessary delays when waiting for a response on something relatively easy.
- 6. Manage your time effectively.** Time block for big projects. Blocking time out to accomplish projects allows you to be focused on the actual task and project without feeling the need to multitask.
- 7. Prioritize your personal events.** Make sure your personal schedule is a priority and is on your professional calendar. This way you won't double book yourself and miss important personal events.

Let's not just talk about change, let's go make it happen.

Leslie Alvarez, CMCA, AMS, LSM, PCAM is the manager of St. Andrews Country Club POA in Boca Raton, Florida and also provides consulting & education services to community association boards and managers through her company Community Association Consulting Experts.

“The **first thing** I do in the morning is read my overnight emails. The second thing is **read this forum**. I frequently print whole discussions and then give them to my board members to read. This forum is a way for me to learn and hopefully share what I have learned with others in our community. Thank you to all that take the time to pose the the questions and to those that share their knowledge for solutions.”

ELIZABETH PITINO

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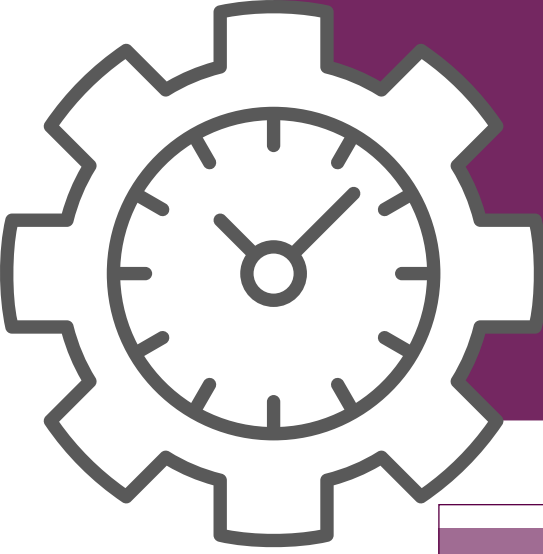
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AAA

Not Just for Roadside Assistance **The Key to More Time**



In the fast-paced world of community associations, time is one of the most valuable resources. With a plethora of responsibilities demanding your attention, effective time management becomes a critical skill to ensure smooth operations and deliver exceptional service to your clients and communities. While AAA may come to the rescue when your car battery is dead, it can't create more time for you. Nor will the use of another app, a new planner or "getting organized." But, by mastering the 3 underlying principles of time management (AAA) you can be more efficient, get more done, be happier, less stressed and feel like you have more time.

3 PRINCIPLES OF TIME MANAGEMENT

AWARENESS

Taking a mindful approach and being aware of how and where you are spending your time will reduce procrastination and allow you to use your time more efficiently. You can improve your awareness by:

- 1. Finding your peak performance time.** Break your typical day into 3 or 4 time slots (e.g., 6-2, 2-10, 10-6) then over the course of a week, rank-order these slots from your most to least productive. You can get even more awareness if you log what you actually do during each time slot.
- 2. Treating your time like it's money.** Create a time budget that details how you spend your hours during a typical week. Categorize time into fixed time ("must do's") and discretionary time ("want to do's").
- 3. Timing-up.** Record how long you spent on tasks with very clear deadlines rather than how much time you spent when there were no deadlines.
- 4. Evaluating how realistically you assess time.** After finishing a project, evaluate how long you thought it would take and how long it actually took.
- 5. Taking a future time.** Think about how the tasks you are doing right now will help or hurt you in the future (e.g., how will today's project tasks impact next week's tasks?).

Laura K. Sanchez, founder of Inspired Interaction, LLC, is a retired community association attorney and prior Director of Marketing and Business Development at Burg Simpson. She continues to work with management companies and boards across the country in areas of strategic planning, leadership development and culture enhancement. This article is based on a course Laura developed for Burg Simpson which they continue to offer.

ARRANGEMENT

Organizing your work to feel less stressed, happier, more fulfilled isn't the answer. Rather, taking control of your life then arranging things like work, family, self-care, etc. around it will produce true happiness, contentment, and joy. How you design and organize your goals, plans, schedules, and tasks is essential in creating true priorities not just to-do lists and action items. Ways to improve your arrangement skills include:

- 1. Setting Clear Goals.** Define what YOU want to achieve. Break down long-term goals into smaller, manageable tasks with specific deadlines. Regularly review your progress and adjust to stay on track. This will help you use your time towards things that help you achieve your goals.
- 2. Prioritizing activities and obligations.** It's not enough to simply list your tasks, to-do lists, and meetings. Include when is it do, who MUST do it, at what level or how well must it be done. (e.g., do you have to clean the house spotless today or can everyone clean 1 room on the surface and hide the rest in a closet till the weekend).
- 3. Avoiding the "working in crisis" mode.** Urgency and importance are related but distinct concepts; urgent tasks require immediate action, whereas important tasks have more significant and long-term consequences. Tasks that are both urgent and important should be done first. Items which can be delegated MUST be delegated. Trust your team members and empower them to take on responsibilities. Delegation not only frees up your time but also fosters growth and collaboration within your team. Lastly, some of your to-dos need to be deleted. They can be added back if they come up again.
- 4. Using ONE calendar app.** Use only one calendar for your work, personal, family, school, etc. if possible. Use color coding or privacy settings to organize it.
- 5. Blocking time.** Allocate specific time slots for different types of tasks, such as administrative duties, meetings, and community inspections but also things like self-care and personal time. Avoid multitasking and focus solely on the assigned task during each time block.
- 6. Planning your next day in advance.** Take 10-20 minutes at the end of each day or first thing in the morning to plan the day based on your weekly goals.

ADAPTATION

All of us in the community association world are bombarded with interruptions, changing priorities and unreasonable expectations of others. Learning to monitor your use of time when these occur and adjust without getting upset, anxious or distracted is perhaps the hardest skill to master but it can be done with practice. Try these:

- 1. Habit stacking.** Tie your time management behaviors to habits you already exhibit. For example, planning the next day while you watch TV at night.
- 2. Short bursts of effort.** When tasks seem overwhelming, put forth maximum effort for 15- to 30-minute intervals to help avoid getting distracted. Squirrel.
- 3. Experiment with technology.** Whether you try a time-tracker app, a checklist app, process automation, or using ChatGPT to improve your communication remember that the benefits you experience MUST exceed cost when using these tools.
- 4. Great reminders.** Reminders should have detailed explanations or descriptions, not one or two words that fail to describe the task's importance, expected quality, key information, etc.
- 5. Reduce time wasters.** Create do-not-disturb time slots and block social media sites during critical work time.

By mastering the underlying principles instead of focusing on another will make you feel as if you've created more time simply by using your time better.

Sustainable *Roofing*



LAUREN MORELY
CP&M/R3NG



People often hear sustainable roofing and assume it just means a green roof. In reality, there are many ways that the roofing industry has expanded on sustainability and practices that you can “sustainably” re-roof your home or building.

When making decisions about re-roofing, there are many sustainable choices:

Commercial
Recycled Roof Material (EPDM)
White Roof (TPO)
Cool Roof
Green Roof
Metal Roof
Solar Panel

Multi-Family / Residential

Recycled Asphalt Shingles
Wood Shingles
Metal Roofing
Clay Tiles
Slate Tiles
Solar Roofing
Green Roofs
Synthetic Shake Shingles

In the roofing industry, the TPO market is on the rise since lighter roofs, like white or gray roofs, have a higher solar reflectivity rate, which reduces urban heat and helps to create a more energy-efficient building. Some cities, such as Denver, require that new low-slope roofs being installed are considered to be a “cool roof” that involves a light or white membrane with a minimum solar reflectivity rate and a vapor barrier to help decrease urban heat and increase sustainability.

Solar energy is another way that sustainability in roofing is on the rise. Not only are a more significant number of people starting to install solar in their homes or business, but technology in the solar world is rapidly changing. In 2022, GAF launched the solar shingle, a solar panel directly integrated into the roof system; this makes solar more aesthetically pleasing, easier to install, and more affordable. As sustainability is becoming prevalent, building owners, property managers, and roofing contractors consciously choose to use sustainable building materials on roofing projects. An abundance of information is available on sustainable methods.

The key to making the right decision for your company, communities, and properties is to ask questions and do your due diligence research.

Unfortunately, the removal and replacement of roofs have begun to take a significant toll on the environment, property owners, and roofing contractors. The debris from the removal of the roof materials, insulation materials, and underlayment materials requires additional labor and transportation to comply with proper waste disposal practices. Most of these roofing materials end up in already overcrowded landfills. Approximately 11 million tons of asphalt shingles constitute 10% of construction and demolition debris. Fortunately, more than just roofing companies are committing to sustainable building materials today. Suppliers are stepping in and making a difference, whether it be sustainable roof coating, recycled materials, or solar-ready roofs, environmentally conscious decisions—like third-party verification on the sustainability of their projects or offering roof recycle programs; in its entirety, the roofing industry is making strides in securing a brighter future for the environment. 🏠

Lauren Morely is one of the owners of CP&M/R3NG. She has enjoyed watching the company grow into a full-service General Contractor with an in-house roofing division. CP&M/R3NG specializes in providing solutions through the P.R.I.M.E. (Plan, Repair, Replace, Inspect, Maintain, Educate) approach. They specialize in working with commercial property managers, H.O.A.-managed multi-family and single-family communities, R.E.O. rehabilitation, apartment industries, and government housing entities.

GROWING

YOUR CAREER: DESIGNATIONS



KIMBERLY CORCORAN,
CMCA, AMS, PCAM
Colorado Association
Services, AAMC®

Community managers play a vital role in the successful management of residential communities. To excel in this field, it is crucial for community managers to continuously enhance their skills and knowledge. One effective way to achieve this is by pursuing designations offered by the Community Associations Institute (CAI).

These designations, such as the Certified Manager of Community Associations (CMCA)* and the Association Management Specialist (AMS), are widely recognized as industry benchmarks. Achieving these designations demonstrates a commitment to professional excellence and adherence to high standards of community association management. It provides community managers with a competitive edge, as it showcases their expertise and dedication to their profession. Earning CAI designations adds a layer of credibility and trust to a community manager's professional profile. Homeowners and board members often seek managers with recognized designations, as they are more likely to gain the trust of stakeholders, foster positive relationships, and build a solid reputation within the industry.

It's no secret that community managers have to wear a lot of hats. There is much for a manager to learn about the industry, specifically, in addition to having business and financial acumen on top of interpersonal skills! To earn the CMCA and AMS designations it requires comprehensive training and education, covering a broad range of topics related to community association management. From legal and financial aspects to operational and governance issues, earning these designations provide community managers with a well-rounded understanding of the intricacies involved in effectively managing community associations. By acquiring specialized knowledge, community managers can tackle complex challenges with confidence and make informed decisions that benefit the community.

One of the highest designations offered by the Community Associations Institute is the Professional Community Association Manager (PCAM). Attaining the PCAM designation is a significant accomplishment that demonstrates an exceptional level of skill and experience in community association management. The PCAM designation goes beyond the foundational knowledge covered in other designations. It focuses on advanced leadership skills, strategic planning, and decision-making processes. Community managers who earn this prestigious designation have honed their abilities to effectively lead and guide community associations toward success. This advanced training equips them to handle complex situations, navigate conflicts, and inspire their teams. The PCAM designation is a symbol of mastery, setting individuals apart as trusted leaders in the community association management profession.

With the PCAM designation, community managers have the opportunity to contribute to the development of industry standards and advocate for the community association management profession. PCAM-certified professionals often play active roles in CAI committees, task forces, and educational initiatives. By lending their expertise and insights, they help shape the future of community association management and contribute to the overall advancement of the industry.

All of these designations provide community managers with valuable networking and collaboration opportunities. By participating in CAI events, conferences, and educational programs, community managers can connect with other professionals in the field, exchange ideas, and learn from each other's experiences. These interactions can lead to valuable partnerships, mentorships, and a broader professional network, which can be instrumental in advancing one's career.

Community association management is a rewarding and challenging career. By gaining professional designations, community managers can position themselves as experts in the field, build robust networks, and contribute to the success of the communities they serve. In a rapidly evolving industry, these are an essential tool for community managers to stay ahead and deliver exceptional results. 🏠

* *The Certified Manager of Community Associations (CMCA) designation is provided by the Community Association Managers International Board (CAMICB).*

*As a results-oriented leader, **Kim Corcoran** supports her team in delivering exceptional service and value to the Board and communities served. In a business that demands strong relationship skills, Kim understands the importance of effective communication and providing excellent and proactive customer service. Kim's expertise in budgeting, operations, and board governance produces solutions, helping to create strong teams, partnerships, and results.*

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7:30 AM Shotgun start

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CAI-SOCO is proud of the following individuals who have demonstrated a personal commitment to self-improvement and have elevated their practical knowledge and expertise:

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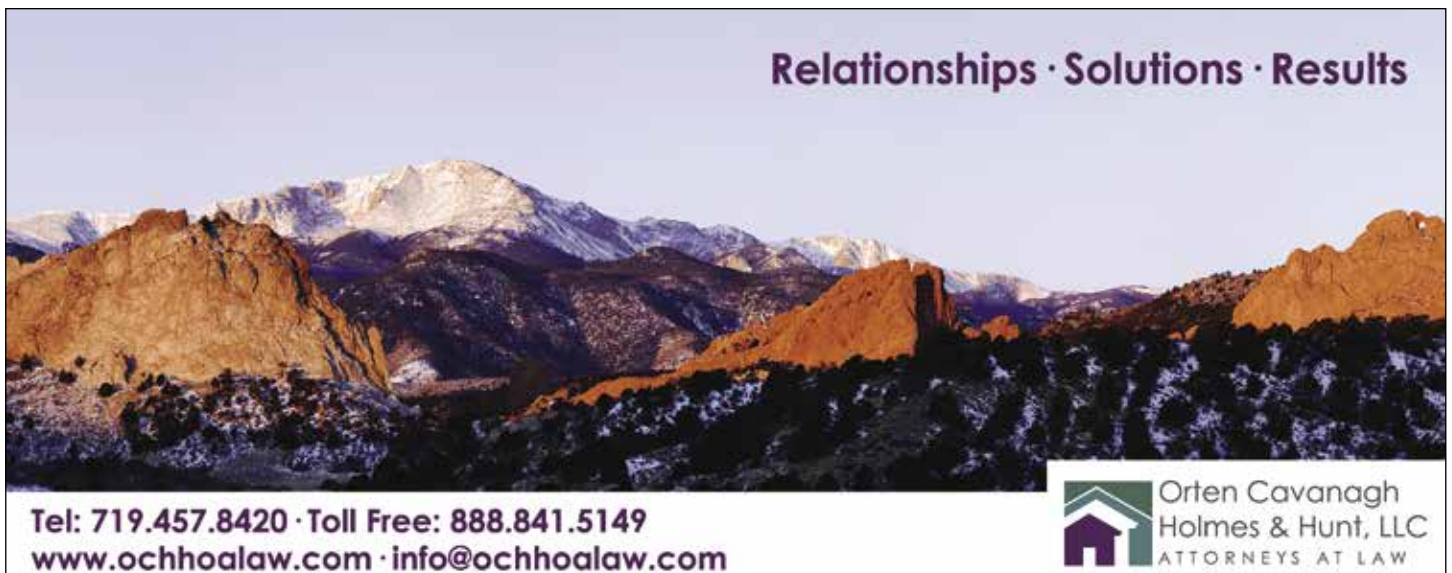
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CAI-SOCO EVENT CALENDAR

July

- TUE—18 CLAC Trivia 2023
- FRI—21 Annual Golf Tournament

August

- MON—07 First Annual SoCo Expo
- TUE—08 Education All Day Law Day

September

- TUE—12 Annual Meeting & Education Luncheon
- WED—20 7th Annual CLACsic Golf Tournament
- FRI—22 Top Golf Tournament

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