

COMMUNITY connections

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Q4 | 2023

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Q4 Photo Contest Winner: Mia Gonzalez

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

COMMUNITY connections

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All ads must be to the required format and specifications or additional charges will apply. All ads must be prepaid. Advertising in Community Connections is a benefit of membership, and you must be a member to advertise. Acceptance of advertising in this magazine does not constitute endorsement of the products or services. Rates available upon request. All advertisements are subject to CAI SoCo approval.

2024 EDITORIAL CALENDAR

ISSUE	ARTICLES DUE	ADS DUE
Q1	16 December 2023	16 December 2023
Q2	17 March 2024	17 March 2024
Q3	16 June 2024	16 June 2024
Q4	15 September 2024	15 September 2024

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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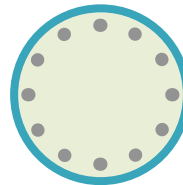
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Planning for the New Year: 2024

by Brandon Helm

The materials contained in this publication are designed to provide our members and readers with accurate, timely and authoritative information with regard to the subject covered. However, the Southern Colorado Chapter of CAI is not engaging in the rendering of legal, accounting, or other professional types of services. While the Southern Colorado Chapter of CAI provides this publication for information and advertising, the Southern Colorado Chapter of CAI has not verified the contents of the articles or advertising, nor do we have the facilities or the personnel to do so. Members and readers should not act on the information contained herein without seeking more specific professional advice from management, legal, accounting or other experts as required.

PRESIDENT'S LETTER



TRINA RODRIGUEZ
*Chapter President,
CAI of Southern Colorado*

I want to talk a little about customer service. Anyone who knows me knows I LOVE some good customer service! Think Chick-fil-A or Disney. I am not talking about the used car salesperson who is right there because they get a commission. I am talking about truly enjoying being a servant leader and giving great customer service because you care about people. I know our industry is tough, I know we deal with a lot of negativity, but we do not have to give as we receive. We can do better. We do not have to make someone else's day worse because someone made ours bad. Go vent to a co-worker, take a walk in the sunshine, drink a glass of water (yes water... we are still at work, people) and smile! Move on. In the grand scheme of things, does what that person said or yelled at you about really affect you personally? Yes, sometimes we make mistakes, and we need to own those and learn from them. Unless you are making mistakes that cost someone their life or your company thousands of dollars, it probably isn't that bad. I know some of you reading this are perfectionists and that is fine as long as you understand that being perfect and striving for perfection are two different things. One will drive you crazy and the other will make you successful and good at your job. My boss thought I was crazy because I told her my goal was to make the person that was mad and yelling at me on the phone to apologize about how they acted towards me by the end of the call. I wanted to kill them with kindness and tell them what I can do for them and find a solution that works for everyone. I truly do not want people to dread calling or dealing with their Manager or Management company. Our job is to make their lives easier. Yes, they still have to follow all the rules, and I'm not saying you don't enforce them. Yes, they may be mad when they call after they get a violation letter. Put a smile on, joke with them, relate to them, talk with them. Offer them solutions and help. Within reason (and with Board approval) give them grace and time to remedy issues. Really SERVE your communities. ⬆

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Making Best Use of *Vendors*



ASHLEY DOUGLAS
RE's Colorado Region

Developing relationships and making the best use of vendors in the HOA industry can seem tricky and frustrating. Still, if done correctly, it can bring value to you as the HOA and your community management team.

One of the things we pride ourselves on at RE is developing long-term relationships with the communities we work with. These relationships provide a great historical frame of reference when issues arise in the community with new boards and managers. Suppose your preferred vendors are able to establish and earn your community's business over time. In that case, the long-term payoff of that historical information will inevitably provide tremendous monetary value to your community as you endeavor into your future projects.

Our industry is filled with vendors specializing in many facets of service to HOAs. This list includes HOA management companies, attorneys, engineers, reserve study specialists, banking partners, insurance specialists, and general contractors, to name a few. It is essential to do your research and develop a list of preferred vendors for all your portfolio needs. A great way to meet and feel out vendors in the HOA industry is by attending sponsored events and tradeshow, such as the ones provided by CAI. All HOA industry events are filled with vendors in different work areas. These events are great tools for management companies and community managers to network and develop relationships with vendors they are lacking and needing. Why is it essential for these companies to be members of CAI? You want to see your partners investing in the industry they are part of. That investment shows you, as the HOA, that your partners intend to be around for the long term.

When qualifying a new vendor, it is important to understand who your main point of contact will be. It is also essential to

understand many other factors, such as reputation and work experience in the industry. How long has the company been in business? Where is the location of their office? What does their past project history look like, and what are these projects' size and magnitude? What is their current capacity and workload? Can this company take on your project and stick to its schedule and timelines? As a manager, you want to ensure the vendor provides their company's value and prioritizes the request.

Once you have researched and outlined your list of preferred vendors, it is important to solicit proposals from your vendors in their field of expertise when their help is needed. If a community request is a single scope, such as a drywall patch, you likely wouldn't need a general contractor to assist. However, your go-to general contracting would be a great fit if a large community request arises that includes 3-6 different scopes of work (siding, painting, roofing, and asphalt). A multi-scope project is a general contractor's area of expertise. In addition, it is critical to be very detailed when sending out the request to your preferred vendor, and if you don't have enough information to put together a thorough RFP, ask your contractor to help you put that information together so you can obtain an apples-to-apples proposal. Clear communication and description of the request are needed, as is an opportunity for site walks with community managers and HOA boards and a feasible submission date that allows the vendor time to provide a comprehensive proposal to the community manager and HOA Board.

The HOA industry is a great network filled with even greater vendors who are eager to help and assist your team and your community's needs. I hope this article provides insight to understand better how to get the most use out of your preferred vendor list. [↑](#)

*As Vice President of RE's Colorado Region, **Ashley's** expert ability to sell and lead has driven her success, starting as one of our first account managers to now overseeing the entire Colorado sales team. Managing the success of the Colorado Region, Ashley works closely with RE's Senior Management to ensure our core values of Safety, Quality, Schedule, Cost, and Communication are fully utilized in the procurement, planning, and execution of each project. For the past 10 years, she has gone above and beyond to foster lasting relationships with HOAs across the region by restoring homes, increasing property value, and making sure the journey to those milestones is transparent and safe. With her priority being to provide value to each client at Reconstruction Experts, Ashley has made her mark not only as a valuable member to our team but also as an advocate for the clients she serves.*

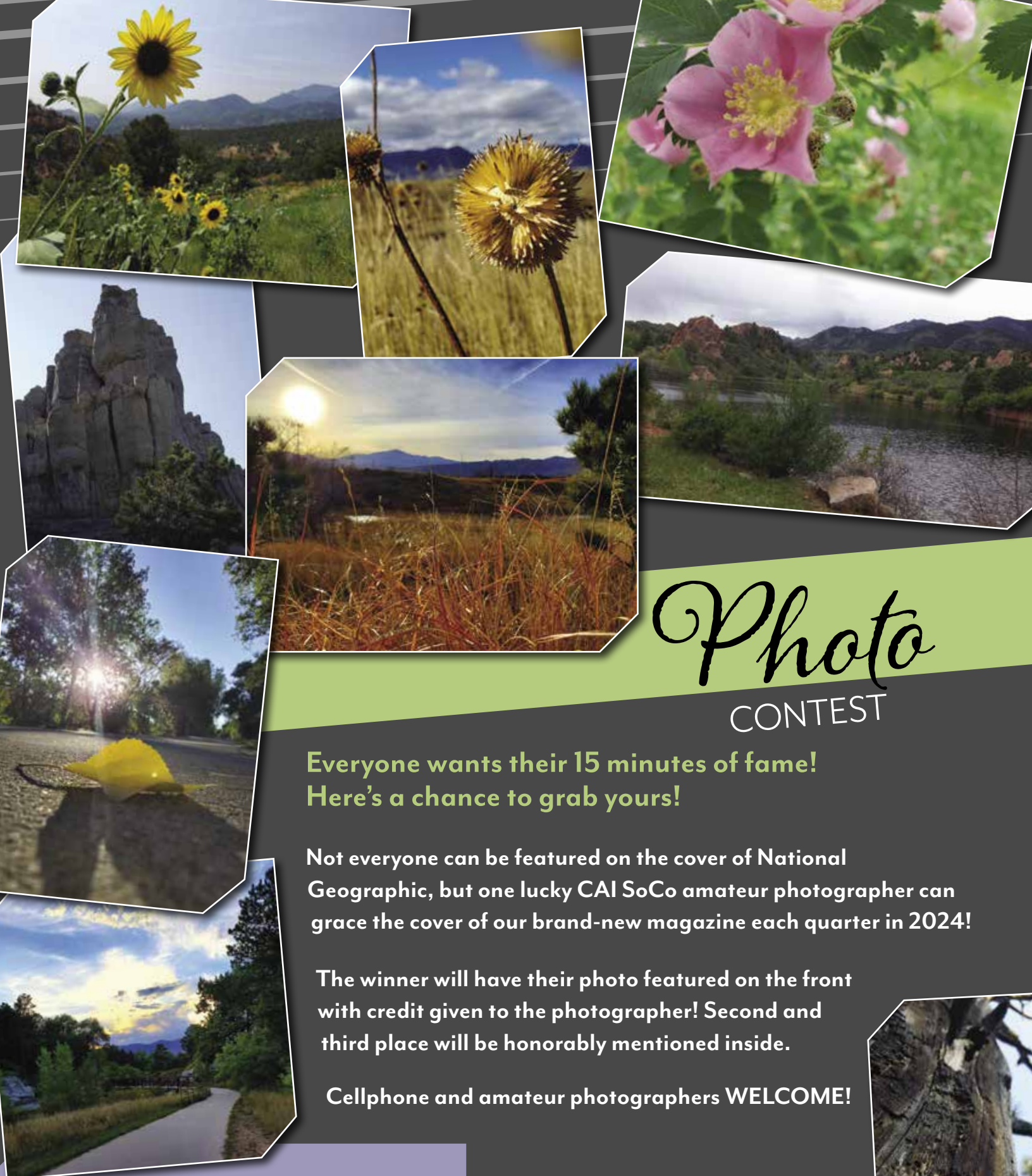


Photo CONTEST

**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 2024!

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 December 16, 2023
to have your image considered.
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.



Reaping Reserve Rewards



Harvesting the benefits of a well-funded HOA



BRYAN FARLEY
Association Reserves, Rocky Mountains

You have put the work in for your HOA. The budget has been passed, the projects have been completed, and now you are waiting for the results.

Will the choices you made for the HOA work? How do you know?

Budgeting your HOAs reserves is like planting a fruit tree. When you plant the tree, there is hope that one day this tree will produce enough fruit to offset the investment that you are making to help it grow. Diligently watering and fertilizing the tree until one day, maybe five years after the tree was planted, fruit begins to grow.

When a board is making the decision on the reserve budget, they are doing so knowing that a little planning now will produce a bountiful harvest for future board members and owners.

However, the issue that we run into with this analogy is that current homeowners may not care if future owners (i.e. not themselves) will have enough money or not. As humans, we seem to be wired to worry about what we know today, and today, we are worried about making sure that we have enough money in our own pockets, let alone if some future owner has enough money to pay for a boiler replacement.

Therefore, what are the current rewards homeowners can reap

from their diligent efforts of budgeting adequately?

Here are three benefits of adequately budgeting Reserves that will positively affect homeowners today and in the future.

Higher Property Values

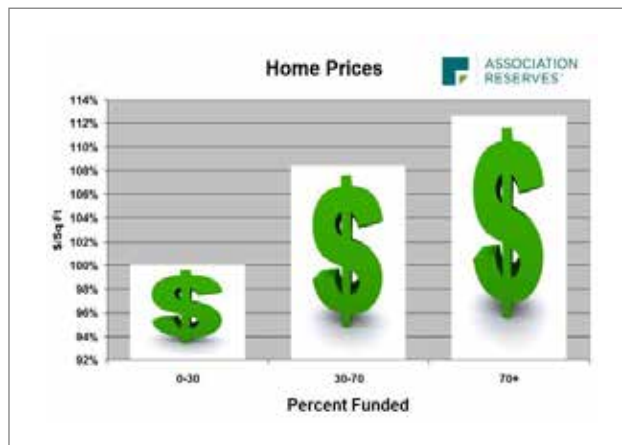
In a controlled study recently completed, we found that home values in associations with well-funded Reserves (above 70% Funded) averaged 12.6% higher resale value than similar

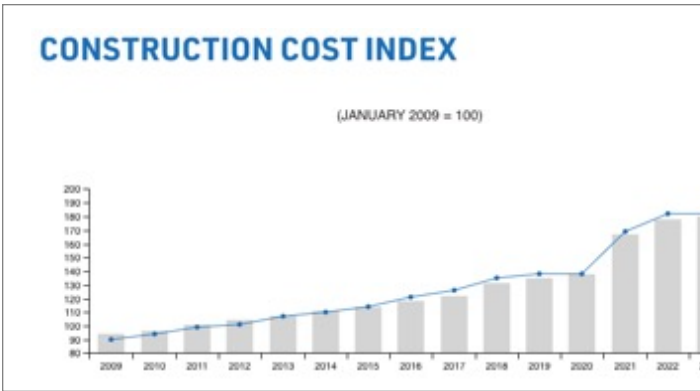
homes in associations with poorly funded Reserves (0-30% Funded). Well-funded Reserves mean maximized curb appeal instead of ugly and budget-draining deferred maintenance and a history of special assessments.

“Strong Reserves” typically exist in associations that are managed well. The evidence shows that buyers are willing to pay more for homes in a well-run and financially stable association. It may cost an extra \$20 to \$60/month in homeowner assessments (\$240 to \$720 per

year), but it leads to increased home values.

A 12.6% increase in a \$325,000 condo is a sweet \$40,950! What a tremendous return on investment from an owner’s additional \$240 to \$720 per year!





Save Money on Maintenance

What if the boiler serving your property for the last eighteen years is now nearing the end of its Useful Life.

A recent boiler inspection reports that the boiler is now experiencing leaking. The boiler is now 18 years old, and the leak repair costs are increasing. How do you make the “repair” or “replace” decision?

It’s simple. For a \$200,000 boiler with a 20-yr life, its economic value drops from \$200,000 to zero over 20 years. Any year that the repair or maintenance expenses rise above the boiler’s economic value, it is better to replace it than continue spending to repair it.

For example, if the quote for the repair costs \$30,000 when the boiler itself is only “worth” \$20,000 (rising “above the line”), it is time to replace, since the cost to replace is now less than the repair value.

Avoid Costly Deferred Maintenance

Deferred maintenance will always cost owners more. Why is that? Inflation will increase costs and deferred maintenance will lead to costly repairs.



According to the construction company **Mortenson**, over the last three years the cost of construction has increased by 30% in the Denver metro area! That means if a board was starting to budget for a \$100,000 painting project in 2020, then they will now need to have \$130,000 for the exact same project.

Deferring the painting project another year, may end up costing the owners more than they thought.

Now, what if the board decides that they would like to wait until inflation calms down a bit before executing the painting project and wait to see if they can come up with more money in the meantime? Well, unfortunately, the siding is still deteriorating every day.

If the board waits too long, the painting project may no longer just be a painting project, it may become a siding replacement project.

On average, the cost to replace a square foot of siding is 8x more expensive than to paint the siding. Therefore, that original \$100,000 expense that turned into a \$130,000 expense, could now be a much larger headache than originally anticipated.

Thankfully, your board of directors and management company are thinking about how to save your HOA money and have approved a budget that will put the HOA on the right track to harvest the fruits of their labor. There is a helpful Chinese proverb that you may have heard before:

“ The best time to plant a tree was 20 years ago. The second-best time is NOW. ”



The diligent reserve planning the board implements now will not only improve the finances of the HOA today, but owners twenty years from now will also reap the rewards of adequate reserve planning. ⬆

Bryan Farley is the President of Association Reserves, Rocky Mountains and has completed over 3,000 Reserve Studies and earned the Community Associations Institute (CAI) designation of Reserve Specialist (RS #260). His 12+ years of experience includes all types of condominium and homeowners’ associations throughout the United States, ranging from international high-rises to historical monuments.

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PROJECT engineering



JOHN PETERSON, MS, PE
Rivet Engineering Group

WHAT IS PROJECT CLOSEOUT?

Project closeout is a crucial part of any construction project, and a successful closeout can mean the difference between an owner or community that feels confident in a project's completion and one that may have lingering questions or concerns.

Project closeout occurs in the final stage of a construction project, typically when the physical construction has been completed, or significantly completed. While each construction entity may view this phase slightly differently, closeout generally includes the assembly and presentation of all the project's final documents to the owner / community. This documentation may include items such as:

- Product Warranties / Guarantees
- Product Information (Colors, Manufacturers, Model #s, etc.)
- Completed Change Orders / Modifications
- Materials Testing Reports
- Requests for Information (RFIs)
- Construction Observation Reports

- As-Built Plans
- Punch List Resolution
- Final Pay Application
- Maintenance Requirements

While there may be other items included in a project closeout, and not all projects will have an extensive list of documents, the closeout phase is generally intended to allow the contractor to demonstrate they have met the requirements outlined in the construction contract as well as the intent of the construction plans and specifications via a comprehensive summary of the project's documents.

An Engineer will typically have less involvement in a project closeout than the Contractor, but the Engineer's role is often a crucial component that can be overlooked amongst all the other requirements of a construction project.

To borrow from Stephen Covey, it is best to approach an Engineer's (or Architect's) involvement in a project closeout by beginning with the end in mind.

BEGIN WITH THE END IN MIND

For many types of construction projects, the process begins with the plans prepared by a licensed Professional Engineer (or Architect). As construction proceeds, the Engineer of Record may provide varying levels of oversight of the construction depending on the contract and the needs of the project. The Engineer's services may include general construction observations as well



CLOSEOUT

perspective

as special inspection requirements for specialized construction methods and materials. Such observations and inspections are commonly memorialized via a letter or report of findings, indicating whether the observed conditions fulfilled the project design requirements or whether remedial work was required. Remedial items should be addressed via a punch list or other documentation for project close-out.

The Engineer's observations during construction are not intended to replace the inspections performed (and required) by a local jurisdiction (building department), but the Engineer's reports may be utilized in this process if the owner and contractor communicate that intent to the engineer during *the beginning stages* of a construction project and the parties and jurisdictions are aware of this intent. Jurisdiction requirements can vary widely - some mandate construction observations or special inspections and a letter of conformance indicating such observations or inspections were performed, while other jurisdictions do their own inspections. Once constructed items such as framing, wiring, or plumbing are covered over, it is difficult if not impossible to determine whether things were in conformance with the project specifications and a final letter may not be possible as a result. This potential issue of documentation can be alleviated by the Owner, Contractor, and Engineer defining what observations and inspections will be needed prior to construction commencing.

Similarly, construction projects often involve changes to the original plans, particularly projects that involve existing buildings and/or unknown conditions. Changes that occur to a plan set may be documented via multiple avenues including Requests for Information (RFI), Engineer Supplemental Information (ESI), or even observation letters as described above. The contractor is

responsible for tracking the changes to a project, and review of the documentation for such changes and the associated costs and time extensions should be included in a project closeout; particularly when this documentation may occur throughout the length of a project and arrive at different times. As a result, changes to a project's scope do not necessarily make their way onto a final set of drawings with all known changes (i.e., an "as-built" set of drawings) unless such documentation is intentionally requested.

An as-built set should not be considered typical or automatic, as it requires additional coordination and consolidation of information beyond most standard design service agreements. Thus, if the owner is anticipating an as-built set at the time of project closeout, this request should be made clear prior to commencement of construction so it can be tracked and coordinated between the contractor and engineer during construction.

With respect to project closeout, if an owner's expectations include specific oversight and documentation that requires the involvement of the Engineer or Architect of Record, it is crucial to communicate those expectations to the Engineer before the construction commences so that any changes can be tracked and coordinated before items get covered over. This will aid in a smoother project closeout for all involved. ⬆

John Peterson, MS, PE is one of two Principals at Rivet Engineering Group. The team of engineers at RIVET handles a variety of design and consulting services for existing and new construction including repair design, investigations, analysis, additions, renovations, and more.



Attorneys Help HOAs Prevent and Address Legal Situations



DAMIEN M. BIELLI
Vial Fotheringham LLP

In my ongoing work as an attorney focusing on HOA law, I continue observing costly mistakes that homeowners associations keep making. Particularly, when it comes to either not understanding or not appreciating the multitude of legal complexities and potential traps into which they might fall. This is especially true in an ever-changing legislative landscape.

Colorado has seen tremendous changes over the past year with laws that impact homeowners and HOAs. Governor Jared Polis signed a bill this summer increasing the number and types of allowable home landscaping, in a state as water-scarce as Colorado. This allows homeowners to legally replace their lawns of grass with beds of rocks, gardens, or even turf.

While it's important to keep abreast of new legal statutes, I consistently find that the most common types of disputes between HOAs and homeowners are those that start out seemingly small before ballooning into something major. Here are some of the most common situations in which an HOA should consult outside counsel.

Changing HOA Governing Documents

An HOA's Declaration, Bylaws, Rules and Regulations and Policies dictate how the organization is run, what activities are considered violations of its policies, and how fines are levied and/or potential disputes with homeowners are to be resolved. These documents cannot simply be changed without proper process, because they are legally binding. Any and all alterations to HOA policies must be undertaken in consultation with an attorney. Policy changes and rule alterations must stay within the authority granted to the Association by its Declaration and not run afoul of state legislation.

HOA lawyers can steer you through altering any HOA documentation. They know the law and can even advise you on the specific wording and phrasing that is required to accomplish the Association's goals and comply with the constantly changing statutory framework.

Discrimination or Harassment

There may be cases where a recalcitrant homeowner believes the HOA is acting in a discriminatory way toward them. In both the Federal and State levels of government, Anti-Discrimination laws are in place. 42 U.S.C. § 3601-3619 and the Colorado equivalent, C.R.S. § 24-34-501 (2) & (3), prohibit discrimination in the sale, rental, or use of a dwelling. This includes most aspects of Association governance. Situations involving discrimination must be approached delicately, and an HOA should consult with outside counsel to investigate the complaint to determine the appropriate response.

Don't try to tackle this on your own. HOA attorneys specialize in analyzing the facts presented with the current laws to determine the validity and severity of accusations of harassment or discrimination. The accusation may be entirely without merit, but as an HOA, you need adequate representation to ensure that your legal interests are covered.

Contracts

On an annual basis, HOAs execute a number of important contracts. These contracts may include landscaping, snow removal, common element repair, trash, and significant renovation projects. These contracts often contain complex legal terminology, which if left unchecked, could put the Association in an undesirable position should complications arise during performance of the contract. Additionally, the Association may find themselves inadvertently in breach of the contract terms for simply failing to understand its obligations. It is important that an Association seek legal review of all contracts to ensure that the Board is fully aware of the parties' respective duties.

Colorado law allows some leeway in the interpretation of precisely what constitutes the proper amount of timing and manner of enforcement for provisions within a contract. An attorney will be able to review the agreement for you and advise on when and how the provisions are being followed—or not—by the homeowner, vendor, or the Association.

In other words, it requires much more than filing a lawsuit to challenge the provisions within such an agreement. Make sure you have an attorney by your side.

Answering a Lawsuit

Needless to say, if a situation has escalated to the level of a lawsuit filed against the HOA, you absolutely must consult a lawyer right away. Very strict time limits exist to answer a complaint, file an insurance claim, or submit a response to a government inquiry. It's one thing to have a disagreement about an HOA policy or regulation, but once it escalates to litigation, everything is considered on the record, and an experienced lawyer will step in to represent you and do the talking.

The best HOA attorneys will ensure that the Association is protected, follow all applicable time restraints, and prepare the Association to be in the best position to defend the case.

Whatever the case may be, you should be contacting a lawyer long before you ever see the inside of a courtroom or a hearing.

Association governance is complex and constantly evolving. The experience and expertise of attorneys specializing in this area are crucial in ensuring that your community is operating within the confines of the governing documents and statutory restrictions. When in doubt, reach out. [↑](#)

*As a partner in Vial Fotheringham LLP, **Damien M. Bielli** has a unique background in HOA Law, trial advocacy, insurance defense, professional liability, coverage disputes, labor law, employment law, construction, commercial litigation, and contracts. He may be reached at Damien.Bielli@vf-law.com*

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Fall is upon us, and for many, the change in seasons and the calendar offers us time to reflect and prepare for the end of the year. It's a time to revisit New Year's resolutions and previous goals, look at what we have accomplished and have not, and narrow down what we want to achieve before year's end. In its simplest form, we reflect on what we have sown and what we can reap. In today's fast-paced world, the absence of this reflective point can cause us to live our lives bouncing from one thing to the next without taking time for our personal growth. If you add the upcoming holiday season, the risk of burnout is possible. In the spirit of harvest and preparation for the holiday season, let's examine ways we can reap joy in all circumstances and build resiliency even when disasters or unfavorable situations present themselves.

Gratitude

In a society that values influencers, product reviews, and keeping up with the Joneses, gratitude helps us stop identifying the gaps we think are present in our lives (which are usually materialistic) and aids us in recognizing and appreciating what we have. How can you start to achieve and keep a mindset of gratitude?

First, when you wake up, fill your heart with gratitude. Be thankful for the simple things: waking up, being warm, the person next to you, and the ability to provide for your family. Starting your day off with gratitude will remind you that regardless of your circumstances, there is always something to be thankful for.

Remember that the situation could always be degrees worse when something unfavorable happens. I know this sounds somewhat cliché. This concept is not to remove or minimize the problem but to help you stay in the mindset of gratitude. Example: A disaster in one of my communities caused significant damage,

interrupting my day and creating more work for me. A gratitude mindset might say, Thankfully, no one was hurt, or we stopped it before it worsened. In addition, you will find other reasons to be thankful. Thankfully, I have great business partners from CAI that I can depend on and help lead this community to get back on its feet. Protect your mindset of gratitude by constantly seeking it out, even during the most challenging times.

Practice giving thanks throughout the day whenever something positive happens. When someone has done something to impact your day positively, give purposeful and dedicated thanks, letting that person know you appreciate them. This outward appreciation will encourage positivity in your relationship and fill that person with warm thoughts.

Gratitude creates positive thoughts and allows you to reap joy daily. It reminds you that you have a lot of great people and things in your life. Having a mindset of gratitude encourages more to come your way.

Grace

We have all made mistakes; personally, professionally, with loved ones and friends, with strangers—errors that have gone unnoticed and mistakes that have had significant negative consequences. Unfortunately, mistakes can live with us, creating a weight on our mind, body, and soul, dragging us down daily. Mistakes can come in two forms: mistakes we have made and mistakes others have made with us. Either way, it is difficult to reap joy when the weight of mistakes and regret is present in our lives. How can we free our mind, body, and soul of this weight? The answer is grace.

Grace is the ability to forgive yourself as well as others. It's the recognition that, as humans, we are inevitably flawed and created imperfectly. The unpleasant reality is others will hurt us, and we will hurt others as part of our human experience. Now imagine that we add a five-pound weight around our neck for every hurt we cause, and others cause to us. Eventually, as the weights stack, because we know mistakes are inevitable, everyone we know, including ourselves, would begin to move slowly, unable to think straight and become disheartened. That is what happens when we don't forgive ourselves or others and decide to carry that burden with us.

Where can you start to show yourself and others grace? Start with yourself. Ask yourself, what mistake do I keep reliving in my mind

repeatedly? What caused it? What did I learn from it? And lastly, how am I a better person after learning from that mistake? After processing that, allow yourself grace, forgive yourself, and focus on the growth you achieved through that experience.

Regarding others, remember you carry the weight of their mistake by not showing grace. Put yourself in their shoes, assume positive intent, and realize in that moment the person who made a mistake or hurt you may not have known how to handle the situation differently. In most cases, the growth and the improvement will come from the mistake. If you cut off the person who made a mistake or didn't show grace, you might be missing the evolution in that person that may add value to your relationship. Reap the joy by eliminating burdens and establishing yourself and others' grace.

Greatness

Have you ever left a task, project, or situation and thought to yourself, NAILED IT!? That moment in time was when you experienced your greatness. We can all achieve some form of greatness, but do we recognize and give ourselves credit for those moments when we are great? When we acknowledge and understand moments that we are significant, we can repeat it and apply it to other parts of life. How do you increase your greatness?


First, take time to recognize it. Next, achieve small acts of greatness daily. Look for small wins and ways to apply other successes to similar tasks or projects. Third, credit yourself for the effort regardless of the success level. Celebrate when your greatness shows up in your actions. Lastly, challenge yourself by achieving excellence at different sizes, importance, and impact levels. You will find that greatness is within you, and the more you earn it every day, no matter how small, it will become a habit and a way of life. Even when disaster strikes, look for opportunities to apply your greatness, big or small. The key is believing you can call on it when needed. The more you call on it, the easier it is to achieve. The easier it is to achieve, the more you can recognize your greatness and reap the joy with self-satisfaction that you did something to your fullest potential.

Gratitude, Grace, and Greatness

To recap. Want to have a positive attitude? Give gratitude. Want to grow, learn, and improve? Give grace to yourself and others. Let it go! If you want to feel good and accomplished daily, show your greatness every day.

Remember these three G's, and you can reap the joy of your harvest daily. 🏡

Robert J. Gonzales is the Business Development Manager for All Phase Restoration. He serves as the Committee Chair of CAI Southern Colorado's Membership Committee. Robert currently sits on the boards of Pikes Peak Suicide Prevention Partnership and Early Connections Learning Center. He also conducts suicide prevention talks, facilitates training courses on customer service and organizational management, as well as motivational talks. He loves to see people grow and achieve personal success. Robert and the All-Phase Team want to show gratitude to CAI SOCO and thank you for your trust and support.




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Seeds of COMMUNITY



KRISTINA SCHURIG, CMCA

There are many seeds that need to be planted to contribute to a thriving HOA community. They include fiscal responsibility, maintenance and upkeep, knowledge of ever-changing legislation, and communication to cultivate a sense of togetherness.

With so much negative press about HOAs, it is imperative that we strive to grow these seeds, work with boards, and help communities embrace the many positive aspects of living in an HOA neighborhood. A well-run association will help owners protect one of the biggest investments they will make, it can make the difference in calling a house a home and a community that feels like a welcoming neighborhood.

To have a successful harvest, farmers will use cover crops; these are crops that benefit the growth of all other seedlings. Fiscal responsibility is the most important seed to nourish in a fruitful association, it would be the cover crop of HOA management. Without funds to keep an association running, operations would cease entirely, essential services would be impossible, and the community would rapidly fall into an unsafe state of neglect and disrepair. Growing and managing your funds is a collaborative effort of boards, management, and vendor experts within our field. There are so many resources to aid in the nourishment of a healthy association. By utilizing experts, boards and managers show that they are bringing in all resources to cultivate a bountiful community. Within CAI we are lucky to have reserve study experts, investment advisors in the banking industry, and specialists in every trade imaginable.

Fiscal responsibility does not mean that you do not spend any money, and this is where regular maintenance is imperative. We have all seen communities with years of neglect and how this ultimately costs more in the long run. It is imperative to nourish the association by having annual maintenance charts and following a reserve study put together by an expert. By fulfilling a fiduciary duty, owners see that the board and managers genuinely care. Seeing work being done is a visual reminder of your HOA working for an owner to protect an asset everyone has invested in.

Our little HOA seedlings need constant care to ensure that they are adapting to an ever-changing landscape. There are discussions and changes to legislation that impact how a community may be run. Our environment to sustain a healthy HOA is under constant scrutiny from people who do not understand how an HOA is actually advantageous. Almost daily there are stories about homeowners suing their HOAs and the stories presented are often successful. This ultimately impacts new laws that limit and hinder how an HOA can be run. Without CAI experts providing education on how these changes impact operations we would be unable to acclimate and rise to these challenges.

Without consistent communication, all the seeds planted to have a healthy HOA are for naught. To begin to eliminate the perceived negative optics of HOAs, it's imperative to keep associations informed of the benefits that the board, managers, and trade partners work for. Many associations have social events, community outreach committees, volunteer days, and hard-working boards just trying to make their neighborhood better. We are working against the weeds of apathy and negativity to foster a sense of pride for residents. 🏡

Kristina Schurig has been in the HOA industry for four years and works at locally owned and operated Dorman Association Management. She enjoys being a part of communities that need ambitious turnaround and working with dedicated boards to bring communities back to safe and beautiful places that people are proud to live in.

“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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The Challenge of Leadership



LEISA KLINGE,
CMCA®, AMS®
Real Manage /
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Leaders, how are things going out there? The current challenges of leading a team, a project, an association seem to be evolving right under our feet.

How many managing people, leadership, and “get things done” classes have we all been to? How many articles on GenX, GenY, and baby boomers have we read?

At the end of the day, we are leading humans. We can choose to lead by compliance or lead by cooperation.

I think we all have been managed by someone leading by compliance. Here are some characteristics of a Leader by Compliance:

- **These leaders lump everyone into one identity, thinking “No one is doing xyz correctly, everyone does xyz wrong, no one listens to me, no one responds properly.”**
- **They threaten disciplinary action en masse, saying “If everyone doesn’t do things properly, you will receive disciplinary action.”**
- **They provide incentives/contests bribing their employees to simply do their job (prizes, gift cards, time off, etc.)**
- **They have easily-identifiable favorites, indicated when some are treated differently than the rest of the group.**

This type of leadership works when the leader is present. The threats and prizes work if the pressure is applied.

Employees do not feel valued, protected, or encouraged. They feel demoralized, fearful of being the next target of the mood of someone else, and unable to safely voice concerns or problems.

The old adage, “when the cat’s away the mice will play”, happens when working for this type of leader. As long as their presence is close, employees will work to complete their tasks. When the cat is away, the phones come out, long breaks are taken, and people huddle to gossip or complain.

Leadership by Cooperation creates an environment of positivity, safety, and encouragement. Employees feel heard, valued for their contributions, respected, and fairly treated. Teams led by cooperative leadership have a mutual respect for their teammates and leadership, they feel a commitment to the team, and aim to do their best whether the leader is present or not. They feel that their leader has their back and that creates a mutual respect and consistent work environment.

Leaders by Cooperation don't need to worry about treating GenX-ers differently from baby boomers because they understand the person well enough to know what motivates them, speaks to the individual person, and works to create a working relationship of mutual understanding.

Leaders by Cooperation do not feel challenged or threatened by team members that take on unpromoted leadership roles with other team members. They encourage growth, contribution, and positive interaction. When one of the flock steps up to provide information or assistance to a team member, the leader knows they are heading in the right direction.

Leading by Cooperation takes much more work and effort. They are leading a diverse group of people with various skills and experience. It takes time to get to know and meet people where they are at.

Leading by Compliance simply needs to come up with new contests and ways to threaten employees into compliance - they don't really care to know their team members. I know a leader that actually referred to her team as her minions. Imagine how motivated and respected those employees felt day after day.

How do you change a culture that you have walked into or created? Baby steps.

I had a manager one time that came in the front door, rushed to his office in the back of the building, sat down, and got to his work for the day. Someone asked him why he does that, avoiding simple greetings to his team, and he said, "I don't have time to greet everyone". I would say, "you don't have time not to greet your

team". There is value in simply taking a moment to stop and say hi to each employee on your team. It helps them to feel noticed and appreciated. That is a great 1st step that people will notice immediately. If you are a senior leader and come to meet with your on-site leader, it's the quickest way you can garner respect from their team. You don't hear, "she went straight to her office, didn't bother greeting anyone on the team." Employees remember how they are treated by senior leadership when they come to visit.

2nd step, ask your team how you can be of assistance to them, and mean it. They want to see that you have as much skin in the game as they do. If you have the ability to take a task off their plate, do it. You have just raised the appreciation and respect factor. Then you are on your way to leading by cooperation. Get to know your team, get to know what concerns them and frustrates them. Leave the threats and gift cards at the door. ⬆

Leisa Klinge, CMCA®, AMS® has been in the HOA Management industry since 2007. Leisa is currently the Regional Director of the Real Manage / Hammersmith office. Leisa was a course coach for Dale Carnegie Leadership for over 15 years. Prior to entering the HOA industry, Leisa served many roles in the banking industry including Vice President.



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Planning for the New Year



BRANDON HELM
Warren Management Group

By the time this issue of the newsletter is published, the budget process for those operating on a calendar year fiscal year will be all but a memory of 2023. But how you drafted your budget is likely the most crucial question. Was the budget the end of your planning process or the beginning? This is important to consider because I have watched Boards of Directors, all too often, write their budget, send it off for ratification by Membership, and then sit on it until January, when they discuss and establish their goals for the year. I have always been puzzled about why the goals aren't implemented before the budget is drafted. While not everything a Board may want to check off the list in the new year has a price tag attached to it, the reality is that most do, to some extent. Wouldn't establishing goals first provide guidance then to the budgeting process?

By now, you are probably either feeling great about your budgeting process this year or worried that you may be starting the year on the wrong foot. If you find yourself in the latter group, that's okay. But talk about this at your next Board Meeting and commit to beginning this process in June or July next year rather than September or October. In the meantime, here are a few suggestions on making the best of 2024 with the budget you're a bit stuck with.

Keep notes

I have an app on my phone that allows me to keep notes on everything from grocery lists to notes made during keynote presentations while attending conferences. I would encourage board members to keep notes during the coming months of projects that need attention, processes that could stand improvement, concerns brought up by owners, and ideas of ways the Board can strengthen the sense of community. These notes will be instrumental when it comes time to set the course for the subsequent year.

Review your policies and procedures

All too often, policies are written and adopted and rarely come before the board again for periodic review and updating. Policies are only as good as the practice of their contents. When practices change but the policies continue to gather dust on the shelf, the trust of ownership is diminished. Commit to reviewing all policies to ensure they remain relevant, compliant with state statutes, and that practices haven't changed. Please don't attempt to review them all in one Board meeting. Pick two or three to review at each board meeting so that the time needed is devoted to the process.

Get bids now

If a project is identified during the goal setting and budget drafting process for completion in the upcoming year, but a bid is not obtained from a reputable contractor, how will you know how much to budget for the project? Much like the process of obtaining an update to the reserve study should start early in the year so the report is completed and available when drafting the budget, as should bids for substantial projects. Setting the goal is only half the battle. Planning for the completion of that goal is sometimes the most challenging part.

Evaluate your investments

Interest rates of CD's and other investment vehicles are some of the most favorable of the last two decades. Coupled with the fact that there have never been so many financial institutions who cater to the Community Association Management Industry, banks are willing to compete fiercely for your investment dollars. That competition means the Association has tremendous buying power. Schedule your investment advisor to attend an upcoming board meeting. Research the rates of several financial institutions, both locally and nationally, and ensure that your dollars are working as hard as they can be for the Association.

Finally, don't be discouraged if you didn't get the planning process quite right this year. Worrying about something you can't change isn't a good use of time. Vowing to be better prepared for the process in 2024 is really all anyone can ask for! ⬆️

Brandon Helm, CMCA, AMS, PCAM, has been with the Warren Management Group since 2002 and currently serves as its President. Brandon and his wife Kelly have been married for 21 years and have two children: Macy is 17, and Maxwell is 15. Brandon enjoys volunteering at the National Mill Dog Rescue and is the coordinator of the Rocky Mountain Pig Jig, an annual BBQ festival benefiting NephCure Kidney International, a non-profit dedicated to research and patient support for those battling rare kidney diseases. Brandon has a passion for education through both speaking and writing.

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- Codey Bolte, CMCA, AMS, PCAM** ▪ RowCal
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Andrew Knarr, CMCA
Kelsey Lynn Knudson, CMCA, AMS ▪ Diversified Association Management
Allie Jo Johnson, CMCA ▪ RowCal
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CAI-SOCO EVENT CALENDAR

November

TUE—14 **November Education Luncheon**

SAT—18 **Board Leadership Development Workshop**

December

TUE—12 **Holiday Celebration & Charity Donation Event**

January

TUE—9 **January Jumpstart Event**

TO REGISTER: www.caisoco.org/events