

COMMUNITY connections

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Q1 | 2022

Being the Best

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Q1 Photo Contest Winner: **Karin Hallock**

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Deadline: First of each month for the following month's issue.

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2022 EDITORIAL CALENDAR

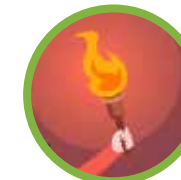
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PRESIDENT'S LETTER



HEATHER SMITH
Chapter President,
CAI of Southern Colorado

Welcome to 2022, the year of creating connections and being our best, together! The events of the past two years have put a full-force spin on what we all formerly considered our "normal" day-to-day. We have been presented with challenges that we never foresaw, and we have overcome thanks to the resources we have at hand. As individuals, we all bring our own perspective, experience, and expertise to the table. As an organization, we have come together to brainstorm creative solutions for new problems, provide a helping hand to communities in need, and to push events forward for the chapter. We have always been a close-knit chapter, but through collaboration we have seen just how fortunate we are to have such vast knowledge in our membership and the relationships to be able to trust in our Business Partners and provide the best service possible for our local communities. I'm looking forward to the exciting opportunities that 2022 brings and the opportunities to connect and collaborate to help each of us be our best individually and as a chapter! 📍

"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 questions and to those that share their knowledge for solutions."

ELIZABETH PITINO

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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 2022!

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!

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BEING YOUR *Best*



JESSICA TOWLES
CMCA, AMS, PCAM; Vice
President of Community
Management, Hammersmith
Management

As servant leaders, we have to remember that our role is two-fold: We SERVE others and LEAD.

Leadership comes in all shapes, sizes, and personality types and comes through in many scenarios. Every person involved in your community association has the potential to be a leader. Many leaders within your community may not think of themselves as a leader. Merriam-Webster defines the word leader as “a person who leads” with examples ranging from “conductor” and “guide” to a “principal officer” or “a person who has commanding authority or influence.”

Typically, the leaders you see in community associations can be further defined as Servant Leaders. Those are leaders who focus on the community and the people around them. They want to see people grow and are concerned about the well-being of others. Servant leaders can become overwhelmed or find themselves burnt out when faced with day-to-day challenges and frustrations. I want to provide some tips and tools that have helped clients, business partners, and myself avoid burnout and be the best leaders we can be.

PUT YOUR OXYGEN MASK ON FIRST.

We’ve all heard the flight attendants as our plane prepares for take-off describing the safety measures necessary. One of the most important takeaways is to put your oxygen mask on first. Why? You can’t help those around you if you haven’t taken care of yourself first. This is a lesson for life, not just leadership. Most recently, I met with several owners and managers impacted by the Marshall Fire on December 30, 2021. The most important advice I felt I could impart to them was to take care of themselves. Grieve. Get angry. Cry. Laugh. Eat. Sleep. Exercise. You cannot be your best self and the best leader you can be without taking care of yourself first.

PUT YOUR FEELINGS ASIDE.

As a leader, servant, or otherwise, you have to master the art of compromise. Compromise means we cannot get emotionally attached to a particular way of doing things or a specific outcome. We have to do what is best for the greater good. Leadership in community associations is like the Three Musketeers. “All for One, and One for All!”

LET IT GO.

Putting our feelings aside is hard enough. Letting go of what we cannot change is even more challenging! As a leader, you will face situations where the decision is not yours to make, but the result is yours to implement. Knowing when to push back on a decision and when to let it go is a critical leadership skill that can prove frustrating. As servant leaders, we have to remember that our role is two-fold: We serve others and lead. Servant comes first, and service is our first role. If the group or entity we serve makes a decision we disagree with but isn’t illegal, immoral, or unethical, it isn’t our place to fight against it. We educate others on the pros and cons of the available choices and let them decide. After they make an educated decision, we implement. When you feel the annoyance or frustration start to bubble up, think of Elsa in Frozen and “Let it Go!” Sing to yourself if necessary. Trust me; it helps change your mindset!

NEVER STOP LEARNING.

Regardless of your role, homeowner leader, business partner, or manager, your leadership skills will be continually stretched and shaped by your growing knowledge and experiences. Continue to grow and learn. Knowledge is the gift that keeps on giving. You’ll gain knowledge in a variety of ways. Attend luncheons and conferences. Read magazines like this one! Learn from each other.

DON'T FORGET TO HAVE FUN.

Sometimes being the best leader we are capable of being is more challenging than one might imagine. No matter how tough it might be or how demanding today’s challenges are, please remember to have fun. Relish your success and cheer people on, including yourself! Our sanity and stress levels need us to shake it off and have some fun from time to time.

I hope you enjoyed reading these tips as much as I enjoyed sharing them. I’d love to hear your thoughts on being the best leader you can be! 🏠

Jessica Towles has been in the community association management industry for over 20 years with experience maintaining all aspects of community associations and management company administration, including facilities management, financial management, and customer retention. In addition to her role with Hammersmith, Ms. Towles currently serves on the Community Associations Institute (CAI) Board of Trustees and is the 2022 President. As a member of the National Faculty for CAI, specializing in the M:100 The Essentials of Community Association Management, she is well equipped to provide continuing education and leadership development to staff, board members, and owners. Ms. Towles is honored to have received CAI's Rising Star Award at the National Conference, the Barbara Wick Award recognizing her work locally and nationally to improve our industry and profession.

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THE IDEAL STEWARD



DAVID FORD-COATES
Vice President Of HOA Banking,
Alliance Association Bank

"WHAT IS MY LIABILITY?"

During a recent lending presentation, I was speaking to a group of board members on the importance of protecting and enhancing the value of the condos in their association. It is the central responsibility of the board, but it did not take long for us to turn to the question asked by most board members. A young lady spoke up... "I was just elected as the Treasurer of the Homeowners Association. I have a background in accounting, but I have never served on a board before and things are in worse shape than I

thought. What is my liability?" It was an important question, of course. We are all concerned about the legal liability we take on as board members, but on a deeper level, most of us want to do a respectable job for the communities that we are a part of.

Since then, I have come to recognize there are four central areas of focus to be The Ideal Steward for your community: (1) Banking and Investments, (2) Insurance, (3) Capital Planning and Maintenance, and (4) Taxes and Accounting.

BANKING AND INVESTMENTS

When managing your association's funds, the number one rule to remember is, it is not your money! You are a fiduciary who is responsible for the funds of a non-profit corporation, owned by all the individuals in the association. Your first priority is safety of the funds.

The Ideal Steward helps the board to establish and maintain a clearly defined Investment Policy Statement (IPS) for the association, so the treasurer and community association manager always know what actions to take with the association's funds. This keeps the board from having to meet every time there is a surplus of funds or a CD comes due. The IPS will address the amount of money to be held in the operating account and what happens when the account goes over or under the target balance. It will also address how the reserve funds should be invested. Areas to consider when developing or updating the IPS may include safety of principal, time horizon for investing, liquidity needs, and target return on investment.

For example, some associations elect to keep funds invested in FDIC insured CD's with maturities less than one year. This is a conservative approach, but it keeps funds relatively liquid, generates some interest, and FDIC insurance is considered the "Gold Standard" when it comes to principal protection. For large balances over \$250,000, many banks offer excess-FDIC products like CDARS (Certificate of Deposit Account Registry Service), that can keep multi-million dollar balances FDIC insured. This eliminates the need to run all over town looking for another bank to place a \$250,000 CD and dealing with multiple signature cards.

Another common investment strategy for associations is to ladder CDs, which can maximize interest, while at the same time maintain an ideal level of liquidity. If you have \$100,000 to invest, you could consider opening a 3-, 6-, 9-, and 12-month CD each for \$25,000. As they mature, roll them into a 12-month CD. In nine months, the association will have four 12-month CD's that mature every 90 days.

Associations that keep high balances in their checking accounts and spend more than \$250,000 per month might consider utilizing a sweep account. In a sweep account the association can set a target threshold for their checking account that is constantly met by sweeping funds in and out of a separate investment account. These funds are often invested in money market instruments and backed by the full faith of the federal government.

INSURANCE

Insurance is perhaps the most significant component of the non-profit association, yet it is often entirely overlooked. When elected to a board your first question should be, "May I review the Directors & Officers insurance policy?" If your association does not have D & O insurance, resign today! No one should volunteer their time if it puts them in a position where they could be sued without the entity they're volunteering with providing protection. There is protection from most lawsuits against volunteer boards, but that does not always stop someone from filing a suit, which can be expensive to defend against, right or wrong.

When it comes to the property and liability insurance for your association, be sure to review the coverages and limits with an industry professional at least annually. Look for an insurance agent that exclusively works in the community association space and is an active member of CAI. Having the proper levels of coverage may cost more, but if you need to use the insurance, you will be glad you elected to pay the higher premium. With the ever-increasing cost of construction, I have seen underinsured associations that had policies based on decades old reconstruction costs, then after a loss occurred they came to me for a significant loan to shore up funding for repairs. Do not be "penny wise and pound foolish" when purchasing insurance for your association.

CAPITAL PLANNING

Since the tragedy that occurred at Champlain Towers in Surfside, Florida, the dangers of deferred maintenance are now front and center. Too many associations have been "kicking the can down the road" for too long with capital planning and maintenance. As an industry, we need to stop this trend immediately. One cannot be The Ideal Steward if one does not understand the true costs and scope of work for keeping the community in good repair. If your community does not have a professional reserve study, then hire a CAI certified Reserve Specialist and get one! If your reserve study is older than two years, then it is time to update it. Please keep the changing economic conditions in mind. Over the past two years we have been dealing with increased construction costs, higher inflation, labor shortages, and construction delays. A reserve study from three years ago may not account for these factors properly. It is important to make the necessary adjustments, or the association can find itself underfunded and off track.

Once you have a current reserve study it is time for the board to gather contractor quotes for each project in queue. Choose the best bids then put the proper budget and maintenance plan in place. If there is a gap in funding, then you will likely need to increase assessments, place a special assessment, and/or take out a loan. If a loan comes into the picture, please confirm your governing documents will allow for a loan, then get quotes from three HOA lenders. This part is never easy and some homeowners will push back, but you completed the appropriate due diligence and the board cannot continue to put this burden on future owners. You have a responsibility to preserve the community and its property values now.

Continued on page 10

Association financials are typically produced monthly, so take a moment each month to ensure their accuracy, and ALWAYS review your reconciliation. You should be able to connect the balance sheet to bank statements; this is a must. Do not be afraid to ask questions. Most community management companies know board members want to understand the financial statements and they want to help you get there.

Associations typically only pay taxes on interest income and other non-assessment related income. Because interest is taxable, the association may be able to deduct financial advice they purchase. You can talk to your CPA about deducting a portion of your management fee if your manager assists with investment policies and decisions. The point is, there are deductions that can be found. It is important to work with a CPA that fully understands the community association industry and participates in CAI. ⬆



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ADVANTAGES OF CAI MEMBERSHIP

My community's HOA Board Members have become more educated and aware of our responsibilities to our community since becoming members of CAI.

We overcame a serious shortfall in our Reserves a few years ago. Due to expert knowledge and assistance of our management company and a reserve specialist, we are now a prosperous community.

The knowledge built by attending the education luncheons and classes are vital for my community and all communities. Meeting and learning about each Business Partner and getting to know them on a personal basis is very rewarding. This enables my community to have a robust group of vendors to call upon when needed.

I encourage every Homeowner Leader, Management Company & Business Partner to become active & participate in CAI.

The knowledge, experience & relationships are worth our time and effort.



LEAH SHANTZ
 Homeowner Leader,
 Courtyards at Newport

Leah Shantz is a homeowner leader and current board member of Courtyards at Newport and is currently in her second term on the CAI of Southern Colorado Board of Directors.



DAVE FLEMING
Territory Manager,
Endeavor Exteriors of Southern Colorado

Ensure a Successful Community Project

Advice from a Contractor

So, you have a new project coming up for your community —perhaps upgrading recreational spaces and parks, replacing roofs or repairing old siding. Whatever the project might be, you're destined to be working with multiple construction trades, people or companies. As a contractor in 2022, the construction industry has changed and continues to evolve to mitigate supply chain delays and staff shortages. If you have a community project on your radar, here's a little advice from your local 2022 contractor.

Clarify Roles and Responsibilities

Not only do you have multiple contractors, companies and people involved performing the hard labor, who on your team is managing the project? Before you can even begin a community project, make sure your team clearly knows what their roles and responsibilities are, including yourself, to keep the project organized. Make sure someone is dedicated to being out in the field to oversee that the work being performed is meeting your expectations. Too often communication from one party to the next gets lost in translation and the best way for your project to turn out how you want it to is having someone on your team overseeing the project every day.

Compare Apples to Apples with an RFP

When selecting your contractors to work with, use an RFP (request for proposal) to get the most accurate comparison. When you receive quotes back, don't be afraid to show a competitor quote to the company you are considering, especially if it's lower. Sometimes, a lower quote is missing items in the bid and you're not actually comparing apples to apples.

Make Sure Everyone is Qualified

There's a lot of hesitancy on choosing a trusted company to work with in the construction industry. Simple verification processes and Secretary of State filings will let you know if the company is in good standing. Go one step further, ask for references to contact and have a conversation about how the project went. Checking online sources like the BBB and Google for reviews and other customer experiences is another great way of prequalifying your contractor. Going this extra step can save your community time, effort, and resources down the road.

Prepare and Mitigate the Unexpected

The Covid-19 Pandemic continues to cause material delays, shortages and even more price increases for labor and materials continue as we start off 2022. Expect delays in your project and higher prices. However, do your best to get your project scope as accurate as possible to avoid costly change orders. Include a budget for unexpected damages that may arise or be found after a project begins as well.

Set Expectations for Your Contractors

Meeting code is the minimum requirement. The work performed should exceed your minimum requirements. Make that clear to your team, and the company completing the job. Provide examples if possible and consider writing out your expectations in detail for the job.

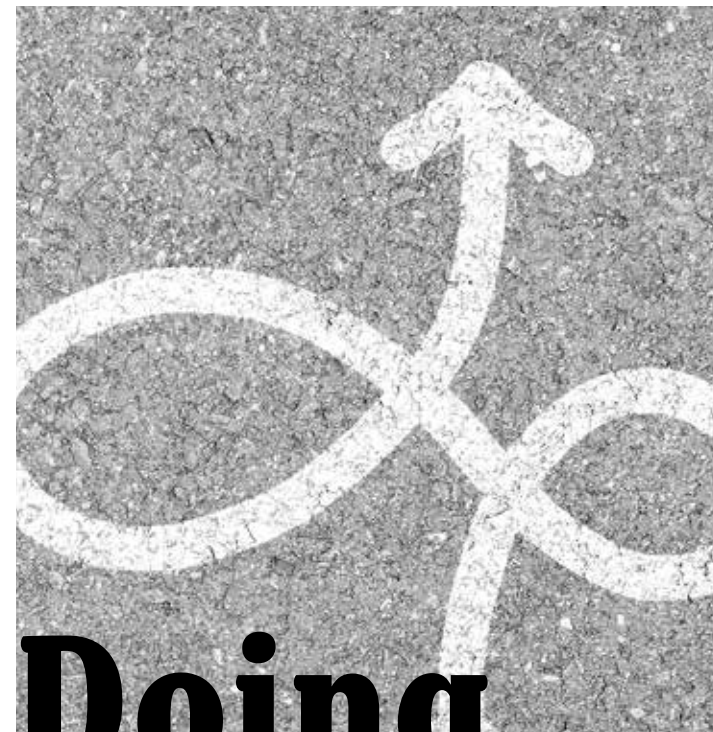
Communicate Often with Homeowners

What's your communication plan? If you don't have one, build one. Your homeowners need to be at the forefront of your mind before, during and after a community project. It's not uncommon for homeowners to feel surprised at the start of roofing or the addition of a new stoplight in their neighborhood. Did they miss a letter or email? Community projects impact the daily lives of residents and communication during a community project is more important than almost any other thing you do. It gives you a chance as the HOA to build trust and support as homeowners are reminded every day they pass by, or through, the project.

Make it a Game for Homeowners

Consider more than just communication with your community, engage with them. For example, provide incentives such as a free swimming season pass or knocking off a few HOA payments in return for their help by avoiding certain areas to speed up construction (ultimately saving you money from extended labor costs). Construction cones everywhere? See who can count and get them right for a prize. HOA's tend to only engage with the community when someone is breaking the rules or they are requesting payments. Wouldn't it be nice for residents to hear from you on a more positive note? ⬆️

***Dave Fleming**, Territory Manager for Endeavor Exteriors of Southern Colorado, has been involved in community and residential construction in Colorado Springs for over 25 years. His team has created nearly ten million in work in the Pikes Peak Region in 2021 alone, enhancing the customer experience and adding value to HOA properties. Dave works closely with ownership groups and board members to deliver on the mission to create an extraordinary experience that is convenient, enjoyable and sustainable in every aspect of each project Endeavor completes.*



Doing HARD Things

I took piano lessons for many years when I was a kid. Posture, curved fingers, theory, technique exercises, foot pedals, tempo, flats, and sharps-the details were so many! More often than I care to admit, I would arrive at my lesson only having practiced once or twice since the last time my teacher and I had met. The ride to those lessons usually included a lecture about the cost of lessons and the waste that little to no practice was to the investment. And how in the world did I ever expect that I would become the pianist that I dreamed of being without putting the hard work in throughout the week?

I went to a boarding high school in Nebraska that had a farm and dairy adjacent to the campus. The proceeds from the farm operations helped support the school. Every student was employed somewhere on campus. I chose to work on the farm and dairy for part of my time there as a student. Sometimes before breakfast was served in the cafeteria, we had already put in a day's work finishing up our 2 am milking shift or making rounds in the cornfields changing irrigation equipment as the sun came up. And during the seasons of planting and harvest, we would work until the field was done, often eating a sack lunch supper, consisting of

a peanut butter sandwich and a warm can of soda, while driving the tractor from the field to the farm hauling grain.

It wasn't always fun at the time but once the day was over, I never regretted putting in the hard work. No one usually does. Doing hard things provides a sense of accomplishment, a dose of confidence, and an increased chance that one has set the course of good habits formed. So many times, because we have our vision set on the destination and not the feat of completing the journey, we lose sight of the fact that the destination isn't what makes us better.

It is the hard work performed throughout the JOURNEY that molds and shapes us into better versions of ourselves.

What does all of this have to do with creating community? You see, a healthy sense of community is the proverbial destination.

But what does it take to "get there"? Sometimes Boards are so overwhelmed with the pressing business of the Association that the time needed to plan, strategize, and set course is never set aside. Kind of like the practice time I should have completed each day leading up to my weekly piano lesson.

A friend of mine recently shared with me the process on which his employer has embarked to evaluate and improve their level of employee engagement. A survey was sent,

and then hours-long meetings ensued to analyze the data and determine how his team would react so that the following survey yielded a yet higher engagement score. He shared with me that once the planning meetings had concluded, it took 6 months for them to unwind the execution of their established goals and begin to reap the rewards with a more engaged staff.

So, how do YOU measure the sense of community where you live? Are your events well attended? Are people still talking about them at the mailboxes several days later? Are you communicating frequently with owners about important information that affects them? Perhaps like the company my friend works for you need to craft a survey to simply ask residents for their feedback. Maybe you'll find that it's not events anyone wants at all! Maybe it's a committee to address safety or research patrol services. Or forming a group of teens to serve the aging population of the community by providing yard maintenance periodically. Or simply opening the clubhouse, turning up the heat, making a pot of coffee, and playing some cards on Tuesday afternoons! What your owners and residents need will rarely be the same as the community next door. It's because communities are made up of people and different groups of people have different needs. It's why we're "Community Managers" and not "Property Managers". We manage far more than property!

This new year is an opportunity to reflect on where you've been and set the course for where you're going as a Board of Directors. Be intentional about setting aside time to plan for the year ahead. What is it you want to truly accomplish? Be willing to put in the work of chewing through the hard stuff together as a Board. Share, challenge each other and in the end, support the goals established by the team (whether you voted for all of them or not!). Make sure your goals are specific and measurable. Without measure, you cannot claim success. And without details, you are a sheep without a shepherd.

And one last thing: don't forget to practice your piano! ⬆

Brandon Helm currently serves as the President of Warren Management Group in Colorado Springs, CO - a team he has been a member of for over 19 years. Brandon obtained his PCAM designation in 2008 at the age of 29 years old - at that time, one of the youngest individuals in the country to have received this designation.



BRANDON HELM
President of Warren Management Group

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How to be the **BEST** Manager



TRINA RODRIGUEZ, CMCA
Director of Community Management for MSI

I know, I know, this is a loaded statement if ever there was one! When I think back on my long (so very long) 10 years in this industry and to the times when things were running smoothly and I didn't feel stressed, I think those were the times I was being the best manager I could be. So, what was different and what exactly was I doing? Well, as we all know, juggling multiple tasks at one time is very high on the list for sure! The other things that I think make a good manager is to have a high level of customer service and empathy. I tell all my managers to put themselves in the homeowner's shoes, how would you want to be treated, talked to, what kind of communication would you want and when would you want to receive it? Basically, use the tried and true Golden Rule!

Take for instance, a community with over 50% rentals that is taking on a major repaving project. Yes, you would want to send out an eblast but that will most likely only go to the owner or property manager. Will they forward to the tenant living on-site? Maybe, but most likely not. Think outside the box, you could deliver a flier with the information to the property and post on each door (maybe the paving company will do this for you), post at the mail kiosks or in a bulletin board. Our job entails a lot of details and problem solving. What details do you need to consider when scheduling this project? Where will all the cars park? Should you split the

community in half and have the half being paved park on the other side of the community? Will you have a tow company on standby to tow any cars not moved and how will you coordinate? Should you have the tow company tag vehicles the night before, probably a good idea. Is it trash day? Will the paving company cone off the areas ahead of time to ensure no one parks there? To ensure the project goes smoothly and you don't have upset homeowners calling you, all these details and more (depending on the community) need to be thought about and planned for ahead of time. Happy and content homeowners are much better to deal with than upset homeowners.

The other thing to remember is **not to take things personally!** When a homeowner calls you upset that they received a violation letter for their dead grass, remember, you are doing the job you are paid to do by the HOA and Board of Directors. You didn't send them that letter, you sent that letter on behalf of the HOA. So let them vent, let them tell you all their excuses, listen to them. Then when they are done, tell them what the solution is and how you can help them. It doesn't help anyone to get upset with them or get defensive. The goal is to keep the community looking good, get compliance to all rules and have happy homeowners!

Attitude is also key. There are small things you can do that make a big difference in someone's day such as answering the phone with a smile on your face. Happiness is actually very contagious; it is hard to keep yelling and being upset with someone who is happy to talk to you and willing to listen and help you however they can. 🏠

BEING A GOOD PERSON AND BEING A GOOD MANAGER GO HAND IN HAND!

Trina Rodriguez is the Director of Community Management for MSI in Colorado Springs. She started there as a Community Manager for a large-scale community in 2011. Prior to being hired by MSI, Trina worked in retail management, which entailed running multi-million-dollar retail stores. Her extensive experience in the customer service industry has translated well to the MSI culture of superior customer service to HOA Boards and homeowners. Trina currently serves on the CAI of Southern Colorado Board of Directors.



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Date: Wednesday, March 16

Time: 9:00-10:30am

Location: Urban Egg, 5925 Dublin Blvd

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Building Blocks to Forming Ethical Relationships



KELLY K. MCQUEENEY
Orten Cavanagh Holmes & Hunt, LLC



LAUREN C. HOLMES
Orten Cavanagh Holmes & Hunt, LLC

What do you think of when you hear the word “ethics”? Do you think of a moral compass? The Greek philosopher Plato? For some, hearing the word “ethics” means an opportunity for a lively debate and for others, it just means a headache and confusion. Whatever your initial reaction may be, ethics impacts our daily lives – it is what drives our decision-making process, which includes... our business decisions.

This article focuses on how business partners can form and promote beneficial, ethical relationships in the HOA industry.

In the professional context, “ethics” generally describe the principles of conduct governing an individual or group in a business environment. That is, simply put, a code of conduct. As such, the question of what is ethical, is a practical question that affects our business and professional relationships on a daily basis – what should I do? This question has less to do with what is legal (although still a factor) and more to do with how individuals and businesses self-regulate.

Each profession, company, or individual can operate by a different professional code of conduct. You may have heard of legal ethics, medical ethics, journalistic ethics, and so on. For HOA business partners, representing multiple industries, you may expect to see variation in code of conducts; however, there are some generally

accepted ethical principles that apply across all professions in the HOA industry:

**Honesty • Trustworthiness • Loyalty
Respect for others • Adherence to the law • Accountability**

Young business leaders learn that they will form a variety of partnerships while growing and conducting their businesses. They also learn that the most successful partnerships are formed with those who are transparent, ethical and share their values. Successful businesses recognize the need to form ethical partnerships with others because it not only strengthens business, but their industry as a whole. Whether you are just getting into the business or are a seasoned-professional, below are general questions to ask to build professional, ethical relationships that are worth keeping:

WHO ARE YOU TALKING TO?

It is important to know who you or your company will be working with – is it a Board of Directors, manager, or other business professional? Remember that your primary point of contact may not be your ultimate client or decision-maker. Try to get a firm understanding of their goals and the scope of the proposed relationship. Conversations may also reveal potential bias or

prejudices that need to be addressed, but also differences and skills that may be an asset. There is no need to interrogate, but conversations in the beginning may avoid uncomfortable conversations and realizations down the road. In some cases, it may also be worthwhile to get references before entering into the new business relationship.

WHAT ARE MY VALUES?

The goal here is to ultimately identify business partners and clients that share in your values. Your values hopefully incorporate the more general ethical principles listed above, such as honesty and trustworthiness, but may be expressed in a more industry specific manner. For instance, a business partner’s code of conduct may require that all client inquiries are responded to promptly and in a courteous, respectful manner. This business partner’s business and reputation may be injured if it works with another company or individual that does not share in these values. Shared values do not mean you will agree on all matters – differences can even be assets to your relationship. However, while differences may be appreciated, do not compromise where it counts.

IS THERE TRUST?

Mutual trust is the crux of any solid professional relationship. Trust

is built over time, but certain qualities are necessary to build that trust. Qualities such as good communication, honesty, integrity, authenticity, responsibility and transparency will encourage trust in you, but also in your industry.

HOW DO YOU FEEL?

If something feels wrong, trust your instincts. More often than not, they turn out to be correct.

In closing, the above questions provide a baseline of the building blocks business partners can use to form ethical relationships. However, the building blocks only hold up to a point. Effective communication will successfully bind those blocks together and demonstrates the principle that the HOA industry values.

Lauren C. Holmes is co-managing partner and one of the founders of Orten Cavanagh Holmes & Hunt, LLC. She has provided general counsel and transactional services to community associations throughout Colorado for over 20 years.

Kelly K. McQueeney is an attorney at Orten Cavanagh Holmes & Hunt, LLC. She provides general counsel and transaction services to community associations. She also currently serves as co-chair of the Education Committee for CAI-Southern Colorado Chapter.

Board Member Benefits of CAI Involvement



LINDA COATS
Homeowner Leader,
Cobblestone at Cheyenne Mountain Ranch

It is my suspicion that currently serving on many HOA boards are many people like me who are experiencing being in an HOA for the first time and find themselves in a leadership position without a good basic understanding of how HOAs operate. So, given this opportunity to put my thoughts in writing, I am glad to share my experience of the value gained by being a part of CAI-Southern Colorado Chapter.

To date, the most benefit shared with our community from our CAI board member participants has come from the education and enlightenment received by attending educational sessions as part of monthly luncheon meetings and annual Law Day events. Additionally, we've used the CAI publications as resources to develop a screening and evaluation methodology to assist us in selecting a new HOA manager when that need arose.

Linda Coats is a homeowner leader and current board member of Cobblestone at Cheyenne Mountain Ranch. Linda has served on the board for six years.

The monthly educational sessions cover a wide range of topics all of which have some importance to HOA board leaders. Topics such as the roles and responsibilities of board members, updating/modernizing governing documents, conflict resolution, how to encourage volunteerism, best business practices, insurance issues, disaster preparedness, pet policies and many, many more pertinent issues which are dealt with on a daily basis within an HOA. The legal aspects of HOA leadership are critical and well addressed in Law Day topics which have included marijuana cultivation and use, code enforcement, amending declarations, and fiduciary responsibility. Awareness of legal aspects among board members is invaluable as is the importance of that information being current.

Let me relate a couple significant instances in which information gleaned from CAI education led to our board taking action. After learning about the importance of reserve studies the board member started asking questions about the financial allocations to the reserve account and finally learned that a reserve study had never been done. That was remedied by the board engaging a reserve study specialist, also a CAI member, to do the study. That study has since been updated and the annual budget allocation for reserves is based on that information.

The second instance relates to the role of the board. It became apparent that the board had become somewhat passive and

was not necessarily meeting its responsibilities. Having been energized by his involvement in CAI our president was able to share his enthusiasm for making changes and pushing the board members to recognize their responsibilities and to begin taking action. The board responded positively and became proactive and still is today. They have assumed the proper role in governing the HOA and with the support of new management and have authorized several big community property improvement and maintenance projects as well as having begun the updating of governing documents.

Learning from the many managers who participate in the educational sessions and who share their experiences and knowledge is always valuable to board members.

In so many instances we all face the same dilemmas and learning of different approaches to solutions helps us, hopefully, address issues in the best manner.

I am not meaning to overlook the importance of the opportunity to get to know the business partners who support and provide critical services to HOAs and are well represented at all meetings. They provide a wealth of information in their educational presentations which are targeted to meet an HOA's unique needs and are always willing to seek answers and provide assistance as requested. ⬆

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CALENDAR OF EVENTS

- JAN**
11 Education Luncheon: January Jumpstart
- FEB**
08 Education Luncheon
09-12 National Law Seminar
- MAR**
08 Education Luncheon
16 New Member Breakfast
- APR**
07 Speed Networking
12 Education Luncheon
16 Board Leadership Development Workshop (Virtual)
22 Annual Bowling Tournament
- MAY**
04-07 National Annual Conference
10 Education Luncheon
11 CLAC Trivia Event
- JUN**
10 Cheyenne Mountain Zoo Event
14 Education Luncheon (Onsite at community)
- JUL**
22 Annual Golf Tournament
- AUG**
09 Law Day
- SEP**
12 CLACsic Golf Tournament
13 Annual Meeting/Education Luncheon
23 Annual TopGolf Tournament

- OCT**
06 Business Partner Sponsored Happy Hour
11 Education Luncheon
12-15 National CEO-MC Retreat
15 Board Leadership Development Workshop
19 New Member Breakfast
- NOV**
08 Education Luncheon
- DEC**
13 Year-End Celebration, Awards, Board Installation & Charity Donation Event

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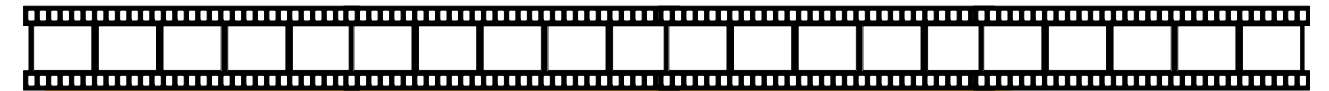
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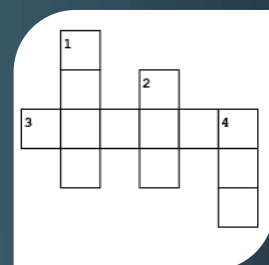
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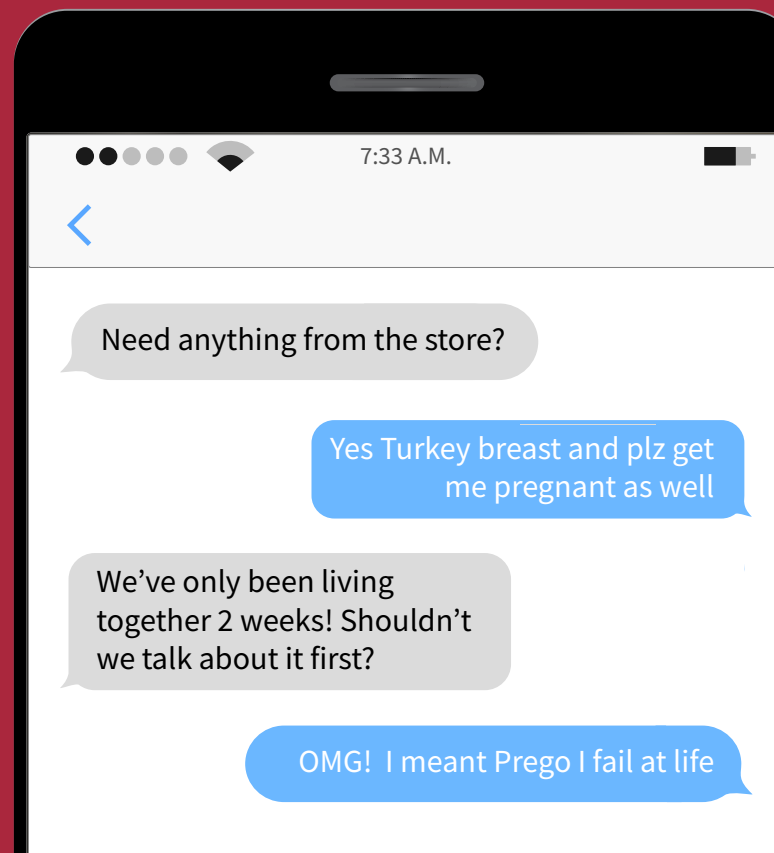
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Ms. Jamie Kay Redden, CMCA, AMS

Alliance Association Bank | MS | 03/08/2021

Mr. David Ford-Coates, CMCA

Alliance Association Bank | CMCA | 03/16/2021

Mr. Adam Noel, CMCA

Diversified Association Management | CMCA | 03/31/2021

Mrs. Kelsey Lynn Knudson, CMCA

Diversified Association Management | CMCA | 05/03/2021

Mr. Jason Kyle Stephenson, CMCA, AMS

RowCal | AMS | 05/12/2021

Ms. Tressa Bishop, CIRMS

USI Insurance Services | CIRMS | 06/02/2021

Miss Ashley Watson, CMCA, AMS

Priority Property Management | AMS | 06/02/2021

Ms. Victoria Schroeder, CMCA

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Ms. Jennifer Yeardley, CMCA, AMS, PCAM

Priority Property Management | PCAM | 12/10/2021

Mr. Ben Sloman, CMCA, AMS, PCAM

Colorado Association Services | PCAM | 12/10/2021

Ms. Kristina Marie Schurig, CMCA

Dorman Association Management | CMCA | 12/28/2021

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Mr. Walter W Wachter, III

Mrs. Amy Michelle Ward

Mr. Kalon DeLuise

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Ms. Linda Brandhuber

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Ms. Traci McDonald

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TUES—08 Education Luncheon

MARCH

TUES—08 Education Luncheon

WED—16 New Member Breakfast

APRIL

THR—07 Speed Networking

TUES—12 Education Luncheon

SAT—16 Board Leadership Development
Workshop

FRI—22 Annual Bowling Tournament

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