

COMMUNITY connections

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Q1 | 2024

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SOUTHERN COLORADO
CHAPTER
community
ASSOCIATIONS INSTITUTE

CALENDAR OF EVENTS

January

9 - Education Luncheon:
January Jumpstart

February

9 - Axe Throwing Event
13 - Education Luncheon

March

12 - Education Luncheon
20 - New Member Breakfast

April

9 - 2024 Trade Expo

May

14 - Education Luncheon

June

TBD - CLAC Trivia (South)
TBD - Family Evening with the
Switchbacks Soccer Team
11 - Education Luncheon

July

19 - Golf Tournament

August

13 - Law Day

September

TBD - CLACsic Golf Tournament
10 - Annual Meeting/Top Golf
Event

October

8 - Education Luncheon
TBD - Board Leadership
Development Workshop
16 - New Member Breakfast

November

12 - Education Luncheon

December

10 - Holiday Celebration,
Awards, Board Installation &
Charity Donation Event

CAI National Events

COMMUNITY ASSOCIATION
LAW SEMINAR
Feb 14-17, 2024

COMMUNITY ASSOCIATION
NATIONAL CONFERENCE
May 8-11, 2024

COMMUNITY ASSOCIATION
CEO-MC RETREAT
Oct 16-19, 2024

Vision & Mission Statements & Values

Vision

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

Mission

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

Values

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

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

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ADVERTISING

All ads must be submitted in 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 are 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	15 March 2024	15 March 2024
Q3	14 June 2024	14 June 2024
Q4	13 September 2024	13 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.

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.

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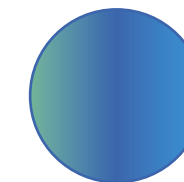
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Meet Our New Chapter Executive Director!



CHELSEA COFER
Chapter Executive Director,
CAI of Southern Colorado

Hi! I am Chelsea Cofer and excited to be the Chapter Executive Director for CAI Southern Colorado! I was born and bred as a Texan but have lived in Colorado Springs for the last 7 years. I graduated from college with a bachelor's degree in Marketing and worked a sales job until I found my calling in the HOA industry. I started my HOA career in Texas back in 2008 as an Assistant HOA Manager and worked my way up to Regional Director for Texas before moving to Colorado. I worked in HOA management until 2018 when I transitioned to the HOA Business Partner side as a Business Development Rep. I have truly enjoyed working in the HOA industry for over 15 years and looking forward to continuing that journey with all of you in this new role.

I am a highly motivated individual with excellent intrapersonal skills. I have experience in managing relationships with clients and providing excellent customer service. I pride myself on building strong, solid relationships by listening and communicating effectively. I am looking forward to working with the Board and members to implement new strategies for the Chapter while continuing to build strong client relationships.

In my free time, I enjoy helping clients with their Real Estate dreams and have been licensed as a Realtor for the last 4 years and it's been a passion of mine since I was a kid. I also have an obsession with dogs and one day would like to win the lottery and purchase a doggy sanctuary and adopt all the dogs! But for now, I love hanging out with my two fur babies, Teddy and Zeus, my wonderful husband, and four stepdaughters. Travel is my hobby and if I am not at work, you can catch me at the airport hopping on another flight to anywhere! I also love kayaking, paddle boarding, wine, reading and working out.

Looking forward to 2024!
Chelsea

COMMUNITY connections

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Tools to Help New Board Members Advance their Knowledge Base



KAYLA GAUDIOSO, CMCA, AMS
Diversified Association Management

Ever felt like serving on the Board of Directors for the first time and just wouldn't know where to start, but want to help maintain and enhance the quality of life within your community? As it may sound rather nerve wracking, it's good to keep in mind that taking on a Board role is a big responsibility and nobody masters it in a day. While the role can be learned through trial and error, the knowledge and experiences really come with time. It generally takes 6-12 months to gain a solid understanding of the association, how it operates, and all the new lingo involved. There is endless information, tools and resources that can be utilized to assist you in being a successful member of your association's leadership team. Let's touch base on just a few key tools to get you started, help advance your knowledge base expeditiously, and allow you to feel comfortable participating and providing input as a representative of the association.

EDUCATE: The biggest part of taking on this position is knowing you must take the time to educate yourself - the great thing about technology these days is, this can be done mainly at the tip of your fingers. Two main areas that a new Board member would like to initially familiarize themselves with would be your association specifics: Governing Documents and the industry-wide resources available. Gaining knowledge about your association is critical to helping preserve, maintain, and improve the value of the community as one of the biggest jointly-owned assets people have the pleasure of being a part of.

GOVERNING DOCUMENTS: Some great tools to start with to build a grasp on the community individually, would be reviewing the governing documents, as these provide for the legal structure and operation of the community and define rights and obligations. These include the bylaws that are used for the administration and management of the community, declarations that dictate

how the HOA operates, and rules and regulations that are in place. Reviewing the Bylaws and all the Rules and Regulations are beneficial to help provide association-specific operation, guidance and structure on requirements, rights, responsibility, and enforcement to adhere to. The key points in the Governing Documents to overview that would be most useful as you get started would be 1) the definitions, so you are knowledgeable on the specific meanings, 2) living environment standards that go over maintenance responsibilities of the building, grounds and HOA vs Homeowner responsibility, 3) Architectural control standards for any exterior alterations, 4) duties and powers of the association and the Board, and 5) the assessment section.

COMMUNITY RECORDS: A couple other quick tools would be the association books and records such as minutes from meetings (regular, special, annual and committee), the maintenance records, and the financials for the past six months minimum, as this would also be a helpful aide of history and beneficial for bringing you up to speed. These community documents help give you a 100ft view of the state of the association, actions and policies that were taken and why, plans and goals for the community, resident feedback and much more.

INDUSTRY: The other main area would be obtaining knowledge about the HOA industry itself. The one thing to know about the industry is it's ever evolving, and we are all still learning. Community Associations Institute (CAI) can be utilized as a HUGE tool for new and current members to learn and expand on knowledge; from seminars, articles, national resources, and periodicals to include magazines and news bulletins about community association ins and outs, legislative updates, and best practices. The CAI website (caionline.org) is a very valuable resource center, that allows access to standardized templates, reading rooms, discussion boards, a resource library, an advocacy center, and multiple programs for community volunteer leadership development and educational conferences. More specifically, CAI provides great basic tools for governance guidelines, a Board member tool kit, and the Board member code of ethics; these are going to be very advantageous to you as a new Board representative!

BUILDING: As you're building your tool kit with those aforementioned utensils, be sure to throw in a community manager for good reference and backup as well. I believe that a trusted manager is a universal tool that holds a substantial benefit to knowing both the community and the industry. Here's to starting your tool kit and growing as a Board member! ⬆

Kayla Gaudioso, CMCA, AMS has been in the industry for almost a decade and is employed by Diversified Association Management. She is extremely dedicated, passionate and has a drive for making and maintaining strong client-based relationships.



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 March 15, 2024 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.

~~UN~~ PREPARED

The Best Thing You Can Do to Protect Your Communities From the Elements Is to Not Wonder **IF** Something Will Happen, But to Plan for **WHEN** It Happens.



DAVE FLECK
ASR Companies

2023 was an amazingly volatile weather year. We had around 1,600 storm reports (vs about 500 in a typical year), and several of them severe. Think hail (lots and lots of hail), thunderboomers, lightning, and of course twisters. With all that came chaos came record property damage all along the front range.

At ASR we're in the business of providing Emergency Services for commercial and multifamily residential communities, so we saw and heard it all in 2023. We worked on hundreds of weather related emergencies, and worked hard to get people and business back up and operational as soon as possible. One thing was clear: when these emergencies hit, some of our clients were better prepared for a disruptive event to happen than were others. The differences between the two were immediate and pretty extensive.

Will 2024 be another crazy weather year? There's no way to know, but what we DO know is that there are several things you can do to protect your community for when the next event happens. Being prepared for emergency weather events is not just a matter of personal safety; it is a civic responsibility that can save lives, protect property, and foster community resilience.

Here are some strategies to consider to protect your community.

Create an Emergency Plan:

One of the cornerstones of effective preparedness is the creation of a comprehensive emergency plan. This plan should include communication strategies, evacuation routes, emergency contacts, and a designated meeting point. Additionally, considering the needs of vulnerable family members, such as the elderly, children, or pets, is crucial for a well-rounded preparedness strategy. Post the plan and make it available in a central location.

Community Engagement and Support:

While individual preparedness is essential, community-wide cooperation enhances overall resilience. Local governments, neighborhood associations, and community organizations play pivotal roles in disseminating information, coordinating evacuation efforts, and providing support services during and after emergency events. Establishing a sense of community solidarity fosters a collective responsibility for everyone's safety, ensuring that no one is left behind during times of crisis.

Emergency Supplies and Kits:

Having a well-stocked emergency supply kit (for the community and for individuals) is vital for weathering the immediate aftermath of a severe weather event. Basic supplies should include non-perishable food, water, first aid supplies, flashlights, batteries, and essential medications. Families should periodically check and update their emergency kits to ensure that all items are in good condition and that the supplies are still within their expiration dates. Adequate preparation can mean the difference between self-sufficiency and dependency during the critical hours following a disaster.

Staying Informed:

Timely and accurate information is a cornerstone of effective emergency preparedness. Monitoring weather forecasts, staying informed about local emergency plans, and heeding evacuation orders are crucial components of staying safe. In the digital age, numerous communication channels provide real-time updates, including weather apps, social media, and emergency alert systems. Being aware of potential risks and responding promptly to official guidance can significantly mitigate the impact of severe weather events.

Do These Suggested Maintenance Tips Each Year

- Winterize exterior spigots unscrew all hoses.
- Garage/bring in items that might freeze.
- Protect any exposed piping.
- When going out of town in winter months, have someone check your home during that time for any possible freezes.
- Open cabinet doors for any exterior water lines and sinks.
- When extreme temperatures arise make sure all faucets can drip slowly.
- Check all windows to make sure they are closed and locked so no cold air can blow in.
- Set thermostat to heat and keep between 68-70 degrees. 🏠

Preparedness is not just a personal responsibility; it is a commitment to the collective well-being of your community, and surrounding regions as well.

Dave has 20 years of experience in residential homebuilding and 12 years of experience in environmental work. This includes asbestos abatement, mold remediation, lead abatement, bio cleanup and water and fire mitigation with a primary focus on customer service. He is responsible for sales and managing all environmental and mitigation work.

VOLUNTEER SPOTLIGHT

Committees Bring Us Together



ASHLEY DRING-HILL, CMCA, AMS
RowCal

As leaders, members, and service providers of volunteer-based organizations, everyone reading this understands how critical participation can be to the success of any group. CAI of Southern Colorado is filled with incredible people working every day to enhance the lives of those around them, and without the dedication of volunteers it would be impossible to credit our chapter with the growth and success we see today.

We want to thank everyone who is currently volunteering on one of our amazing committees; your time and participation is truly valued.

We also encourage everyone to browse the list of committees that keep CAI-SOCO running, reach out if anything catches your eye, and come together with the rest of our amazing volunteers to propel our chapter through 2024! CAI joins us, but committees bring us together.

Membership Committee

Co-Chairs: Robert Gonzales & Aletta Marciano

Current members: Danielle Della Rosa, Danielle Holley, Terrin Klym, Lee Shakespeare, Ari Shore

Board liaison: Scott Matheson

Description: The Membership Committee is responsible for increasing the chapter's membership numbers, interacting with prospective members at events to reinforce the welcoming nature of the chapter, reaching out to members who haven't been as involved in chapter events, and obtaining feedback from former members on ways the chapter can improve. This committee also organizes and hosts two New Member Breakfast events each year.

Committee meeting dates:

Second Tuesday of each month, 10:00 AM, The Pinery at the Hill

Education Committee

Co-Chairs: Lindsay Thompson & Danielle Holley

Current members: Selina Baschiera, Richard Beall, Linda Coats, Kristina Schurig, Heather Smith, Jason Stephenson

Board liaison: Danielle Holley

Description: The Education Committee is responsible for creating the education event calendar (topics and speakers) for the year to present to the Board of Directors for approval. Each committee member is assigned at least one monthly education event and is responsible for coordinating with the selected speaker(s) to ensure the session is pre-approved for CE credit through Community Association Managers International Certification Board (CAMICB). They are also responsible for communicating presentation expectations and ensuring each presentation is provided to the committee in advance of the session.

Committee meeting dates:

Third Friday of each month, 9:00 AM, virtual

Special Events Committee

Co-Chairs: Lindsay Boshart & Shannon LeBleu

Current Members: April Ahrendsen, Toni Chatman, Kayla Gaudio, Allison Graff, Taryn Klym, Kate Leason, Stephanie Plost, Trina Rodriguez

Board liaison: Jessica Walker

Description: The Special Events Committee is responsible for the fun "after hours" events for CAI-SOCO. They identify, plan, and execute some of your favorites: the bowling tournament, year-end/holiday party, top golf tournament, and one family-friendly event each year! Their creativity and attention to detail ensure our membership enjoys even more interaction throughout the year, while getting to know each other in many different settings.

Committee meeting dates:

Third Monday of each month, 11:00 AM, virtual

Golf Committee

Co-Chairs: Jason Stephenson & Mike Kelsen

Current members: Mike Bolsinger, Gordon Floyd, Kayla Gaudio, Kim West

Board liaison: Scott Janson

Description: The Golf Committee is responsible for executing CAI-SOCO's largest income-generating event of the year. Their creativity and outside-the-box thinking ensure our members have a phenomenal time and win truly excellent prizes.

Committee meeting dates:

Second Friday of each month, 11:00 AM, virtual

Expo Committee

Chair: Nicole Hernandez

Current members: Shelby Burch, Hayden Heidbreder, J enae Langreck, Doug Leskee, Cole Reynolds, Trina Rodriguez

Board liaison: David Ford-Coates

Description: The Expo Committee is responsible for planning and executing CAI-SOCO's newest annual event -- our very own expo! This committee selects the venue, negotiates the contract, secures exhibitors, and promotes attendance for the expo. In 2023, the inaugural event had incredible success, and fully anticipate similar results in 2024.

Committee meeting dates: TBD

Editorial Committee

Co-Chairs: Tressa Bishop & Mia Gonzalez

Current members: Geneva Cruz-LaSanta, Ashley Dring-Hill, Terrin Klym, Jourdan Winters

Board liaison: Wendy Lovin

Description: The Editorial Committee (formerly known as the Newsletter Committee) is responsible for the production and distribution of CAI-SOCO's quarterly magazine. The committee brainstorms yearly/quarterly themes, and each quarter they identify current CAI members from whom to request timely articles that support those themes and bring value to all membership classes. Each committee member is responsible for reaching out to request an article each quarter from a CAI member, following up to ensure they meet the set deadline for the quarter, proofreading the article, and submitting the article for publication.

Committee meeting dates:

Third Thursday of each month, 10:00 AM, virtual ↗

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There are so many different ways to get more involved with your chapter, and every single committee contributes to the vitality you see and feel when you attend a CAI-SOCO event.

Interested in joining a committee? Email info@caisoco.org with the subject line "Committee Position" and let our chapter leadership know which committee(s) you want to join!

Adapting to New Laws

IMPACTING COMMUNITY ASSOCIATIONS



KIKI N. DILLIE, ESQ.
Altitude Community Law, P.C.

It seems like every time we start to get used to how things are, a new law gets thrown at us and we have to adapt again. My practice specializes in debt recovery for community associations and just since 2020, we have been clobbered with new laws and requirements relevant to collections under COVID, then restrictions on collections in general, then restrictions on collections specific to community associations.

Is it frustrating? Of course. Is it also going to continue to happen? Certainly yes. So, rather than getting worked up and angry every time it happens, I've made the conscious choice to accept it. Change is an inevitable constant in life and community associations are no exception.

As a Board Member or manager in the community association industry, what can and should you be doing to stay on top of the ever-changing legal landscape?

- 1. Stay educated:** First and foremost, make sure you are aware of what's going on in the world of community association legislation. You don't need to try to follow every bill introduced in the legislature. Sign up for attorney and/or CAI newsletters and blogs and let them do the work for you. Each time a law is introduced that could impact community associations, the industry attorneys are paying attention. We are working behind the scenes to prepare for whatever our clients will need once the law becomes effective, if it passes. By the time the Governor signs the bill into law and an effective date is official, it's time to get the word out about next steps for our clients. CAI and many attorneys issue updates on current legislation and what they mean for community associations. Both also provide webinars and in-person classes with updates and helpful information, including those focused solely on legislative updates.

- 2. Take action:** Watch for calls to action issued by CAI or other organizations you trust. If you feel strongly about a particular issue, follow up and have your voice heard.
- 3. Contact your association's attorney with questions:** Any time there is new community association legislation, there will be questions. Remember that you have resources available to you! Contact the association's attorney and find out the answers to your questions. You might ask any or all of the following: Does this impact me and my association? Do I need to do anything? Do I need to update any practices or policies to reflect the new laws? If these new requirements conflict with my association's current governing documents, which do I follow?
- 4. Notify your homeowners of the rule changes:** Providing open communication and transparency with your homeowners is usually very welcomed. This is especially true if there are changes that your homeowners will notice or be impacted by. Relevant information can be included in a community newsletter or the association's website. Providing information to homeowners can have the dual benefit

of answering questions people didn't even know they had and also increasing a sense of confidence in the Board's knowledge and leadership. If a Board is keeping up on current legislation impacting associations and homeowners know that, they are more likely to have trust in their Board to run the community well.

- 5. Follow the new rules:** If a new law impacts you, make sure you are following it. Updating a policy is not enough if you don't also follow the updates.
- 6. Trust yourself:** If someone says something that rings a bell, say something. For example, if someone at a Board Meeting says something about towing rules and you believe you may have heard something about that fairly recently, trust yourself! First, you are correct. There was recent legislation about towing. Second, make a note to yourself to look into it to be sure your association is up to date and compliant with current legislation.

Most importantly, remember to stay flexible. The laws impacting community associations are always evolving. Sometimes we like the changes and other times we don't, but change is inevitable so let's be prepared for it! ⬆️

Kiki Dillie is a Shareholder and Debt Recovery department head at Altitude Community Law, P.C., located in Lakewood, Colorado. Altitude Community Law specializes in representation of community associations all over Colorado and has offices in Lakewood, Loveland, Colorado Springs, Frisco and Durango.



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BUILDING AN EFFECTIVE TEAM

The Serious Business of Having **FUN**



DAVID FORD-COATES, CMCA
Alliance Association Bank

Building an effective team doesn't have to be a snooze-fest filled with corporate jargon and trust falls. Injecting a healthy dose of humor into the process can turn it from a daunting task into an enjoyable adventure. So, let's explore how to build an effective team while keeping the laughter levels high.

Define Clear Goals and Expectations: Avoiding the Bermuda Triangle of Ambiguity

Picture this: Your team navigating the treacherous waters of the Bermuda Triangle of Ambiguity, where deadlines disappear without a trace and goals are as elusive as a cat avoiding a bath. To dodge this comedic disaster, start by setting clear goals and expectations. Leaders must articulate a clear vision and establish specific objectives. It's like giving your team a GPS for success - with a few entertaining road signs along the way.

Emphasize Diversity and Inclusion: The Spice Girls of Team Dynamics

Remember the Spice Girls? They taught us that diversity makes everything spicier and better. Your team should be the Spice Girls of the corporate world - each member bringing their unique flavor to the mix. Diversity is a key driver of innovation and creativity within a team. A diverse group brings together individuals with varied perspectives, skills, and experiences, contributing to a more robust problem-solving environment. Embrace diversity like you're picking your favorite spice for a team stew. Ginger, Scary, Posh, Baby, and Sporty - everyone plays a vital role in the chart-topping success of your team.

Foster Effective Communication: Avoiding the Email Black Hole

Communication is the lifeblood of any successful team, but let's be real - email chains can be as confusing as trying to solve a Rubik's Cube blindfolded. Establishing effective and open channels for communication ensures that information flows seamlessly among team members. Regular team meetings, both formal and informal, provide opportunities for members to share updates, discuss challenges, and collaborate on solutions. Moreover, leaders must encourage active listening to create an environment where every team member feels comfortable expressing their thoughts and ideas.

Develop Trust and Accountability:

Trust Falls and Team-Building Karaoke

It is paramount to create an atmosphere where team members feel secure in sharing their opinions and taking calculated risks. At the same time, fostering accountability ensures that each team member takes ownership of their responsibilities. This combination of trust and accountability builds a cohesive team where members can rely on each other to deliver high-quality work. Building trust is no easy feat, but why not make it fun? How about incorporating trust falls into your weekly meetings? Just kidding - you might end up with a few bruised egos and a stack of medical bills. Instead, focus on creating an environment where trust naturally flourishes. Maybe a team-building karaoke night is in order - nothing builds trust like hearing your boss attempt a rendition of Bohemian Rhapsody.

Encourage Collaboration and Teamwork:

Because Two Heads Are Better Than One

Collaboration is key, but sometimes it feels like everyone's working in their own little bubble. Encourage team members to work together, leveraging their individual strengths to achieve common goals. Foster a culture that values collective success over individual accomplishments. Break down those invisible barriers with team-building exercises that actually make sense. A brainstorming session can turn into a freestyle rap battle of ideas, and who knows, you might discover the next Notorious B.I.G. in your midst.

Provide Opportunities for Skill Development:

The Skill Swap Extravaganza

When team members feel supported in their personal and professional growth, they are more likely to be engaged, motivated, and committed to the team's success. Investing in skill development is crucial, but why not turn it into a carnival of talents? Imagine a Skill Swap Extravaganza where Tim from HR teaches breakdancing, and Karen from marketing imparts her wisdom on interpretive dance. It's a win-win situation - skills get honed, and the office turns into a talent show extravaganza.

Foster a Positive Team Culture:

The Coffee Machine Chronicles

Positive team culture is like the aroma of freshly brewed coffee wafting through the office - it's impossible to ignore. Encourage a positive atmosphere by valuing collaboration, innovation, and a healthy work-life balance. Celebrate wins, big and small, and foster a culture where laughter is not only allowed but encouraged. After all, a team that laughs together stays together - especially if there's a well-stocked coffee machine in the breakroom.

CONCLUSION:

BUILDING AN EFFECTIVE TEAM DOESN'T HAVE TO BE ALL SERIOUS BUSINESS.

Injecting humor into the process can make the journey enjoyable and help your team overcome obstacles with a smile. So, put on your humor cape, unleash your inner stand-up comedian, and watch as your team transforms into a powerhouse of productivity and laughter. After all, who said building an effective team can't be the most entertaining part of your workday? 🐔



David Ford-Coates is the Vice President of HOA & Special District Banking for Alliance Association Bank, a Division of Western Alliance Bank. Member FDIC.

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YOUR COMMUNITY'S DIGITAL PRESENCE



DAVID J. GRAF, ESQ
Moeller Graf, PC

Managing your community's digital presence these days is easier and more complex than ever. On the uncomplicated side, the cost of technology and its widespread use by owners makes it a tremendous opportunity to connect and deliver more information at a lower cost. On the more complex side, even communities with the best digital presence must compete with unofficial Facebook communities, Next Door, and other platforms that purport to have accurate association information. Let's be honest here—scandals and lousy news sell newspapers, and they capture and hold people's attention. Association newsletters may help discover a good pumpkin spice bread recipe, but rarely are they gripping to read.

And association communications should not be gripping to read—we don't want horror stories becoming part of our community's identity. So, let us start with reality—a few owners want to see everything happening. Most don't like community information unless something affects them, in which case they want it quickly. The foundation of a digital presence begins with providing access to needed community information at low or no cost. Financials, budgets, reserve studies, a community calendar, meeting minutes, and similar information should be available on demand. This involves a website to be accessible according to the owners' schedule.

Some of the best websites that I have seen have some or all of the following characteristics:

- ★ A clean layout where documents can be easily found.
- ★ An easily found community calendar.
- ★ Architectural information and downloadable/editable forms.
- ★ The association's contact information.
- ★ A "frequently asked questions" section.

The budgeting and financial data should be password-protected from non-owners.

The use of technology has made the traditional standalone website somewhat obsolete. Now, there are online portals where nearly all public information can be found, work orders can be requested, and bills to pay can be reviewed and approved by the board. That said, a traditional standalone website is exponentially better than no website.

Once we have the website handled, we next consider how we push out information to the owners. Several boards and managers have said, "Our community is aging—our owners don't want emails." First, I am consistently surprised at how tech-savvy our seniors are. Don't write them off. Second, if

they don't want to receive emails, they don't have to give their email address to the association. But email blasts, when not used excessively, are a great way to keep owners informed proactively in real-time. This could be for urgent issues such as water service, impending weather, snow removal protocols, and lost dogs that have been found. But the blasts can also remind owners of upcoming meetings, significant item garbage collection events, and community volunteer opportunities. As the board starts using email blasts as an owner-service tool, it might be surprising how many people want to opt into the emails.

With this stable foundation of a digital presence, let's tackle the elephant in the room—how do we handle digital misinformation? This is a tough one, as community leaders' time is finite. You cannot spend hours per day on Next Door as some owners seem to do. Also, you are bound by the truth, and they are not. Lastly, your facts are usually not interesting. Gossip and accusations are attractive to most people.

Consequently, only some volunteer leaders can keep up with the digital false rumor mill. I suggest stopping trying to do so. And there are legal reasons why you should not—individual directors don't often have the authority to speak on behalf of the entire board.

This is where a decent and informative website or online portal comes in. You can control the dissemination of accurate information about the community; this does not mean that everyone is going to read that information, but at least you can redirect them back to a source of accurate information.

Reading ranting digital posts that spread false information is frustrating and can be demoralizing. It is a new national trend to whine and gossip online. It is growing faster than pickleball. However, there are things that you can influence, and there are things that you can control. Influence the conversation by giving access to accurate information early. Resist the urge to control the uncontrollable. ⬆

David Graf, current president of CAI's College of Community Association Lawyers (CCAL) Board of Governors, has practiced community association law exclusively since 2001. He has attended countless complex and contentious board and member meetings on behalf of associations. David is one of the most sought-after community association industry trainers and speakers in the U.S. and is a CAI faculty member. He travels nationwide to facilitate multiday corporate training for professional community managers. In 2015, he was named CAI's National Educator of the Year. David is a double-certified life and mindset coach, holds the Certified Professional Coach designation, and is an Energy Leadership Index-Master Practitioner. When not practicing law, David coaches professionals on outrunning burnout, chasing happiness, and living the best life right where they are.

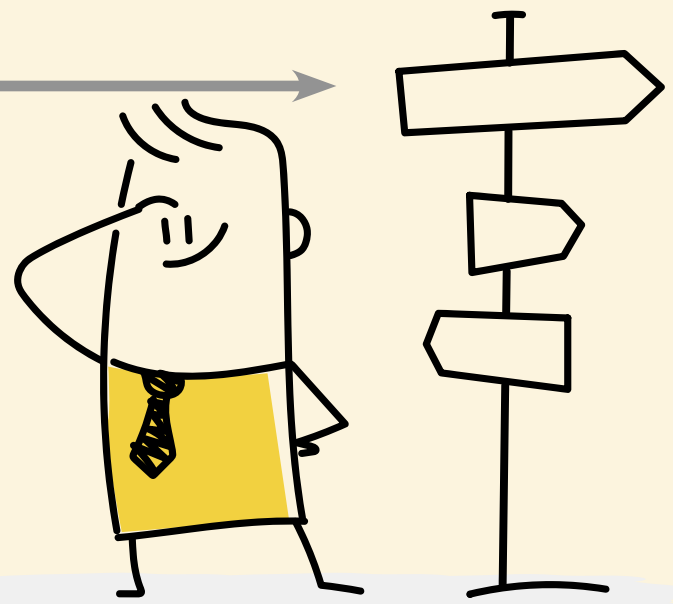
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EMBRACING NEW HOA TECHNOLOGY TOOLS: NAVIGATING CHANGE MANAGEMENT FOR BUSINESS SUCCESS



All those involved need to understand the purpose behind the change to feel motivated and engaged throughout the process of adopting a new and improved way of accomplishing business goals.

Importance of a Transition Plan

A well-thought-out transition plan is the backbone of a successful technology implementation. It outlines the steps, timelines, responsibilities, and resources required for a seamless transition. Here's why a **comprehensive** transition plan is indispensable:

1. Minimizing Disruption

While it may be clear why new technology tools and capabilities are required to stay competitive, it is imperative to know how you will provide **continuity of service** while making changes. A carefully crafted plan helps minimize disruptions to daily operations. I have personally seen very large CAM teams change their tooling while providing continuity of service without any disruption at all. Plans must ensure that employees are adequately trained and prepared before the new tool is fully integrated into their workflows. This eliminates downtime and prevents any productivity dips.

2. Addressing Resistance

Resistance to change is a common hurdle in adopting new technology. A transition plan allows for identifying potential sources of resistance early on and devising strategies to address them. Involving employees in the decision-making process and addressing their concerns can significantly reduce resistance.

3. Optimal Resource Allocation

A plan helps allocate resources efficiently. It outlines the budget, personnel, and other resources needed for implementation, ensuring that the right support is available when required.

4. Evaluation and Feedback

A transition plan includes mechanisms for evaluating the effectiveness of the new tool post-implementation. Gathering feedback from users allows for continuous improvement and adjustments, enhancing the tool's functionality and user experience.

Steps for a Successful Transition

- **Assessment and Planning:** Evaluate the current workflow, identify pain points, and set clear objectives for the new tool's implementation.
- **Engage Stakeholders:** Involve key stakeholders from different departments in the decision-making process to gain diverse perspectives and support.
- **Thorough Training:** Provide comprehensive, In-Person, training sessions to ensure that CAM team members are proficient in using the new tool. Offering ongoing support and resources for learning is crucial.
- **Phased Implementation Options:** Typically, this is only considered depending on the business need for the new technology tool as that may be a more rapid need depending on the team. This provides the option to roll out the new tool gradually, starting with smaller portfolios and moving on to larger ones.

- **One Source of Communication & Communicate Continuously:** Maintain open lines of communication throughout the transition. Regular updates from a project manager, weekly in-person Q&A sessions, and feedback channels create a supportive environment.
- **Monitor and Adapt:** Continuously monitor the adoption process and gather feedback. Be ready to adapt the plan based on insights and challenges encountered during the transition.

Conclusion

Adapting to new technology tools is a journey that demands careful planning, effective communication, and a proactive approach to change management. A robust transition plan not only ensures a smoother implementation but also sets the stage for maximizing the benefits of the new tool within the organization that can have transformative effects for CAMs, board members & homeowners. By prioritizing the transition process and involving team members in the change, HOA/COA management teams can navigate technological advancements more effectively and drive success for their clients in the ever-evolving digital landscape. ⬆



NATE HAYNIE
CINC Systems

In today's rapidly evolving business landscape in the HOA management space, the integration of new technology tools has become pivotal for staying competitive and efficient. Homeowner-focused **AI tools and cell phone apps** immediately come to mind. However, the process of implementing these tools often involves significant change management within an organization. Transitioning to a new software tool, or tool(s), requires a carefully laid-out plan and a proactive approach to ensure a smooth adoption and is also the main catalyst for maximizing its benefits.

Understanding the Need for Change Management

Adopting a new technology tool isn't just about the tool itself; it's a shift in the way people work and interact within the business ecosystem. In our industry, this can affect both the internal Community Association Manager (CAM) teams and the board members and homeowners simultaneously. Change management plays a critical role in facilitating this adjustment. It involves preparing, equipping, and supporting team members to successfully adopt the new tool(s) and embrace the increased efficiency that it brings.

One of the fundamental aspects of change management is communication. Transparent and effective communication about **why** the new tool is being implemented, its benefits, and how it aligns with the organization's goals is crucial. In HOA/COA management, this transparency is further needed to extend to board members and homeowners.

Nate Haynie is a Senior Account Executive at CINC Systems with a 10-year background in technology and software. In his free time, he enjoys the outdoors and running around with his wife and four children.

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Sustainability

in HOAs:

An Exercise in Planning

Sustainability is perhaps best understood as a social goal concerned with improving people's relationship with the natural environment to enhance the quality and longevity of life. The application of sustainability is far-reaching, having a global impact on everything from ecology to policy, and business. But for the context of Common Interest Communities, sustainability has been primarily focused on built environment issues, categorized by waterwise landscapes, building design, energy efficiency, and resource consumption, for example. More recently, things like electrical vehicle charging equipment and compliance with local and State programs, like Building Performance Colorado, have entered the discussion.

There's no doubt that Associations have a great opportunity to implement such measures in their community with the potential of real, positive impact on an entire neighborhood. After all, an association's governance purpose is to advocate for the integrity, performance, and durability of the community's shared assets. Despite a rather obvious opportunity, however, the process of moving from intent to action is much less straightforward and presents varying challenges throughout.

Here are some common concerns to demonstrate further:

"I love the idea of our community having a xeriscape landscape and less unused grass. Should we do a one-time special assessment to pay for it? Won't we save money on water? What's the payback period?"

"I don't understand why EV charging stations are suddenly a priority for the Board. I know it may increase our property value and more people own electric vehicles now, but what about the balcony waterproofing project that we've talked about for 2 years and never completed?"

"Can't we take advantage of our sunny days in Colorado and install solar panels on our townhome roofs, or at least the garages? Maybe this would help offset our electricity fees."



To acknowledge, navigate, and overcome such obstacles, associations should consider the concept of Planning. The process of planning includes evaluating, prioritizing, strategizing, and forecasting. Essentially everything needed to move from intent to implementation. Naturally, Board members and management teams will find themselves performing such disciplines, but often haphazardly and without structure. A more deliberate planning process creates a framework that considers the association from a holistic perspective and allows a Board to conduct a proper due diligence effort to aid decision-making.

There are a few noteworthy components of an association plan:

A **Priority Framework** helps Boards evaluate the importance of one project or another by using a set of predefined criteria, allowing more efficient discussion with an agreeable methodology. For example, a Board may choose to rank projects by 1-Safety, 2-Critical Infrastructure, 3-End of Useful Life, and 4-Cosmetic.

A **5-year Project Outlook** is a schedule of priority projects formatted into a realistic schedule. Each project should be listed by year and detailed with further analysis. For example, the findings of an engineering evaluation may be justification for a project to be at the top of the list, or perhaps to be safely deferred, knowing there is no immediate risk of deferral per a professional opinion.

Lastly, a well-crafted plan should include a **Financial Forecast**. Much like the 5-year Project Outlook, the Financial Forecast is not intended to replicate or be an abbreviated version of a Reserve Study. Rather, the Forecast should be grounded in more comprehensive analysis and due diligence in order to be a helpful tool for association budgeting. This may require a scope of work development and contractor estimates as well as other financial considerations like reserve contributions or planned special assessments.

With the Planning mindset, sustainability initiatives are not considered special, one-off, or pet projects. Rather the framework of a comprehensive plan offers an opportunity to integrate sustainability measures into a broader process while acknowledging other important and perhaps related issues on the property.

Furthermore, a well-crafted Plan offers additional benefits that extend past the posterchild sustainability projects. Let's not forget that in order for a community to achieve a baseline level of sustainability, it needs to have safe, hazard-free, critical infrastructure intact and well-maintained. Solar panels could be a great addition, but not if the roof sheathing is rotted and needs to be repaired. Additionally, an association needs to be financially stable and with a positive forecast. Yes, waterwise landscaping can save a substantial amount on the rising cost of Colorado water, but an association shouldn't bank on xeriscaping being its singular pathway to financial freedom.

Associations that have invested time, money, and effort in the planning process also stand to see improvements to the last pillar of Sustainability, which is social sustainability. The process itself can be conducted to engage the community members and to communicate the Board's actions in a way that is democratic, transparent, and based on reason. Ultimately, the Plan should aim to build confidence in the strategic direction the Board is taking the community and garner support among the owners.

The sustainability journey for owners' associations isn't merely an environmental endeavor, but a multifaceted undertaking to enhance the overall well-being of the property and its residents. As associations invest in the Planning process, a blueprint for a sustainable community will emerge, creating opportunities for green projects, but also building the foundation for a financially and socially resilient community. 🏡

Chris Marion is the Vice President and Chief Strategy Officer of 3.0 Management. Chris has spent his career working in the built environment and has earned undergrad and graduate degrees in Environmental Studies and Sustainability Planning. He is continually motivated to help 3.0's clients on a strategic level by helping Boards evaluate, prioritize, plan, and manage projects and financing plans.

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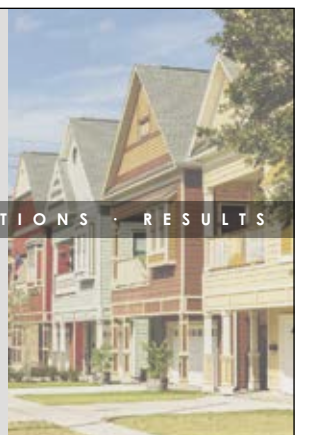
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20 New Member Breakfast

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