TIPS FOR PROFESSIONAL SUCCESS!

by Robert M. Nordlund, PE, RS www.ReserveStudy.com Nov 12, 2019
& Tiffany Jackson, LCAM, CMCA, AMS (2019 MOTY winner – On-Site)
& Pamela Coleman, CAM (2019 MOTY winner – Portfolio)

Miss the webinar? Watch it here: **https://youtu.be/zQJ9FkfvJR0**

In this webinar, we hear the two 2019 National Manager of the Year winners share some of their tips for professional success. Hear how they manage high performance in the midst of challenges (hurricanes, inadequate budgets, boards with clearly different technological preferences, time pressures). What does it take to deliver results that include significant cost savings and customer satisfaction that results in peaceful and productive communities with maximized property values? How do you select and surround yourself with a successful, winning team?

Our speakers share from their years of experience, the kind of skills and experience that led to winning the 2019 National Manager of the Year Contest.

Please find the Questions and Answers portion of the program on the next page, followed by the presentation's slide-show.

For additional information, please visit:
www.ReserveStudy.com and www.ManageroftheYear.org

Webinar Questions Asked By Attendees

Q: What are the pros and cons of manager licensing in your state?

A: (Tiffany) State licensing here in FL requires managers to have a general knowledge of state regulations and demonstrate their knowledge by taking a licensing exam. In addition, it provides some protection to associations since managers are required to submit their fingerprints and pass a background check prior to becoming licensed. But the 18-hour licensing course doesn't make someone competent. Managers need ongoing education and experience to manage associations well. The cost of the course, exam, and licensing tends to keep some from entering the field.

A: (Pam) Licensing is important to help provide the backbone of education needed to be a community manager. There are complexities in this industry that new, unlicensed managers might not know about. Licensing classes and Continuing Education classes are valuable to help managers serve their clients. CO recently stopped the licensing requirement and now there are community managers unaware of laws that have changed or codes that have been updated, and many managers are no longer getting that extra layer of education that can help them deal with difficult situations within a community.

Q: What do you think are the value of professional designations (PCAM, LCAM, etc.)?

A: (Tiffany) Professional designations create value in two primary ways. First, they provide valuable education to managers, so they don't have to learn the basics by trial and error. Second, they demonstrate a higher level of knowledge, which conveys to prospective employers, colleagues, vendors, and others that the manager is a true professional with a baseline of expertise in their field.

A: (Pam) I was CMCA certified for 10 years then took a 7 year break. When I came back to Community Management I made a point to get recertified. It brought me back up to speed with what was going on in management in the present. The credential shows that I am dedicated to knowing the information needed to manage the communities I serve. It is similar to the difference in having a high school diploma and a college degree in this field. CMCA, PCAM, LCAM is like the graduate, masters and PhD for community management.

Q: How do you guard your time but still respond in a timely manner to all that email traffic?

A: (Tiffany) For me, having an email system is crucial. My daily routine for managing emails includes: (1) Checking my email first thing in the AM (as soon as I get into the office), (2) Responding to priority emails first and other emails next, (3) Having a system for invoices – I print a copy for the hardcopy invoices folder and save a digital copy in a "to be paid" file. (4) Using the auto-reply feature is also helpful. It assists me when I am out of the office or to control high volume email traffic, by letting the sender know when they can expect a reply, and (5) Keeping business emails on my business computer only and not on my smart phone. Balance is very important. It can be very difficult to relax if you see emails coming in on your phone during your "off" time. Even though I'm on-call 24/7 for emergencies, I communicate that a phone call or text is the only way to reach me after hours. I also provide detailed messages, so callers understand that I'm on call for EMERGENCIES only. All other calls will be returned during business hours. This helps me to avoid burn out and provides people with reasonable expectations.

A: (Pam) I check my email first thing in the morning to set the pace of the day. Things that can be answered quickly I address and move on. Things that require information from others I forward so I can give them time to get the answer. Other items that require more time/research I schedule to take care of at another time of the day. I will put it on my calendar as if it was an appointment and focus on the information at that time. If it will take some time, I email the sender to let them know that I am working on it so I don't continue to get more and more emails from them on the same subject.

Q: Are your Board meetings open to residents? If so, how do you limit the time they need or take to impact the agenda?

A: (Tiffany) Yes, all Board meetings (with a quorum of the Board) are open to residents. When needed, I've used a timer (like a kitchen timer) that rings when the resident has reached the three-minute time. If you utilize this method it is important to remind attendees when the meeting begins that they will have three minutes to speak, that a timer is used to be fair, and to be sure that everyone who speaks is provided the same amount of time.

A: (Pam) Yes, unless it is an executive session. Owners are allowed 3-5 minutes to address a question or an agenda item. If they start to go over that time I remind them that the Board needs to move through the agenda to address all the items. If it is something on the agenda that is a hot topic for the community, comments will be noted and the item may be tabled for further discussion before a decision is made by the Board. While it can seem like a time consuming process, it is important to hear what the owners have to say about the community and the way it is being managed. If it starts to get off topic, then it is important to remind the owner that they need to address their concerns concisely and on topic so the Board can move through the agenda. Limiting responses to 3-5 minutes helps do that.

Q: Can you please describe how you approach the preparation of Board Meeting Packets in terms of your philosophy, how you present the packets, what to include or not include on the agenda, and any other advice related to Board Meeting packets?

A: (Tiffany) We have a very active Board that prepares their own packets. We have a mailbox system, in our office, where meeting documents are left for each board member. I also use a white board to track projects and items that require Board motions. A week prior to the meeting, I review the agenda with the Board President and email a draft of the agenda, along with any pertinent information, to the Board members. In addition, I provide a weekly action item list and a monthly manager's report to the Board up to date.

A: (Pam) Standard information, agenda, previous minutes, financials, and any supporting information to the agenda items are included. Sending the packet out at least a week in advance gives the Board members an opportunity to review and make changes to the agenda or ask for additional information/questions that the manager can prepare for before the meeting and have the answers when the Board meets instead of prolonging the decisions that need to be made. Knowing that I will send this out a week in advance, I try to put together the packet at least 8 – 9 days ahead of time so I can review and make sure I have all the information the Board will need for the meeting.

Q: We are a 3,150 member community who were transitioned from the developer controlled board now in a self-managed environment after throwing out the management company. How would you suggest we do visioning for our long term goals?

A: (Tiffany) First, I recommend the Board have a plan be in place **PRIOR** to ending the management contract. As a part of that plan I recommend that the Board seek professional guidance. That could include reviewing the decision to remove the management company, creating a plan with the association attorney and accountant. As the on-site manager of a self-managed community, I believe the most critical parts of the transition would be retaining the official records, having people in place to conduct operations, and having a system in place to collect assessments. Self-management (compared to outside professional management) can be a very good thing for the community if done properly.

A: (Pam) I would recommend that you get connected with CAI to find out what information classes are available so you can keep up to date with the laws for your state and how they apply to your community. Many HOA legal firms have classes that can assist you. I would further recommend getting connected with managers from management companies in your area to get their input with subjects that may be an issue for your community.

Q: What tips do you have for when multiple people are working on issues for one subdivision? Ideas for easy transparency within a team? (manager, assistants, accountants, etc.)

A: (Tiffany) Delegating tasks to individuals, having a consistent form of communication, and setting timelines would be an efficient way to involve many people. Setting meeting times to discuss progress and share information would be a great way to keep everyone in the "loop" and create transparency within the team. There are also shared technologies (such as a folder in a shared drive, Microsoft team, or other application) where team members can upload documents for the team to review.

A: Delegate the responsibilities so no one is doing double work. Plan a team meeting weekly or every two weeks depending on the issues that are being worked on so everyone is aware of things that are going on. Stay connected via email about major issues and make sure to pass the information to the team member delegated to that area of responsibility instead of taking it on so the work is not duplicated, or it may already be resolved, and you don't know. <u>Communication is the key</u> to understanding what has been taken care of, what is being worked on and who needs to know about the situation.

Q: An Open Forum time during Board meetings is required by law in our State. Since Open Forum is a proceeding therefore minutes are required (according our understanding of the law). I've noticed some associations do record minutes for Open Forum and some don't. What is your opinion?

A: (Tiffany) That is a great question best posed to an attorney or CAM in your state.

A: (Pam) Minutes are minutes, not hours. It would be important to capture what was discussed, but no decisions are being made. I would recommend bulleting the items out i.e.

- Questions addressed about the pool
- Concerns about violations
- Time frame for DRC response

These items can become an action item list for the Board and the manager to address for a newsletter or the next meeting.

Q: What software, apps or IT tools do you use to make your team more efficient/effective?

A: (Tiffany) We are frequently looking for opportunities to make operations more efficient and effective. Recently, we've implemented several tools to assist us. Below is a list of tools that we utilize:

1. **TOPS One** – a cloud-based property management system https://www.topssoft.com/

2. **HOAst** – electronic voting system (integrated with TOPS) https://www.hoast-inc.com/

3. **Mail Chimp** – mass email communication (avoid getting blacklisted as a spammer) https://mailchimp.com/

4. **Swift Reach** (Emergency Alert System) – phone, text, and/or email residents with urgent communication (such as, emergency water shut offs, serious weather events, etc.) - https://swiftreach.com/

5. **Community Mobile App** that is integrated with our website – provides residents with community information at their fingertips. Since we are a 55+ community we made our app very simple with large print and four basic links, including: a contact link (to call the office or guard house), a calendar link (to view schedule of activities), a tee time link (to view their scheduled tee times), and an emergency link to report after hour emergencies. It pulls information directly from our website, so when we update information on the website the app automatically updates. This was developed by our IT specialist.

A: (Pam) It is good to have computer software that can capture a record of responses to owners so if you have to go back and review what has taken place it can be done easily. Software that works well for DRC requests, and violations and accounting to be recorded on each owner within a community is important. Apps that can be downloaded into a phone are helpful when the manager is in the field and coordinate with the team any action that has been taken.

Q: Do you or your team send out a regular newsletter or blog or other regular communication? And can you please describe what you think works best about those types of communications?

A: (Tiffany) Yes, we have a monthly newsletter (delivered to residents via hard copy) and available online through monthly-media.com/. We also use mass email to communicate with residents who have opted-in to receiving them. Our newsletter is 100% free and produced by a media company who pays for the newsletter through advertisements. I prefer the mass email option because it is instantaneous and allows pertinent information to be shared quickly. However, many of our residents appreciate the hard copy of the newsletter for the calendar of activities and the articles. We do not have a blog yet. We are currently in the process of forming an IT committee, so that may change in the future. Our goal is to reach as many of the residents as possible. For reminders, we post an A-sign by the guardhouse at our entrance to remind residents of meetings and activities. This has been very successful for obtaining proxies for meeting quorums and increasing attendance.

A: (Pam) Newsletters are always helpful to keep owners informed. E-blasts have become more important to get information out quickly i.e. the trash will be coming later today or a reminder that painters are coming in the next two days so patios should be cleared. While e-blasts are great, not everyone has email so posting information at a public place in the community can be helpful as well. Encourage owners to get on the email list so they are as current as possible.

Tips for Professional Success

With 2019 Manager of the Year winners Tiffany Jackson and Pam Coleman

…. A webinar brought to you by

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Robert Nordlund, PE, RS

ASSOCIATION RESERVES

Tiffany Jackson, LCAM, CMCA, AMS

FAIRWAY VILLAGE FLORIDA

Pam Coleman, CAM

AdvanceHOAManagement
Moving Communities Forward

Today's theme…

THE NATION'S PREMIER AWARD FOR COMMUNITY MANAGERS
MANAGER OF THE YEAR AWARD

Tips for Professional Success:

2019 MOTY Winners

- Tiffany Jackson (On-Site)
- Pam Coleman (Portfolio)

Today's theme…

National Contest

- Free to enter
- Sponsor supported
- Three stages
- Recognition and cash prizes

www.ManageroftheYear.org

TIFFANY D. JACKSON
LCAM, CMCA, AMS

About Me

- General Manager hired 2016
- University of South Florida – magna cum laude graduate in Management & Finance
- 15-yr background in property management & real estate.

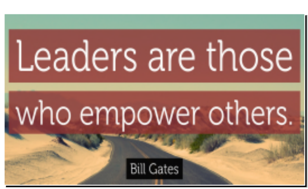
About Fairway Village

- Self-Managed Cooperative in Largo, FL
- 751 homes on 128 acres
- 100% Resident Owned
- Private Golf Course
- 55+ Active Community
- Over 50 Social Clubs

CAM to CAM

By Tiffany Jackson, LCAM, CMCA, AMS

- Technology
- Communication
- Challenges



Technology

Managing IT in an evolving world

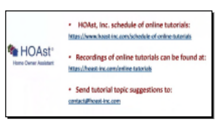
Technology is an essential part of Community Association Management. It impacts all of us and is ever-changing. Have you ever worked with equipment or a program, only to find out it has changed or was replaced just as you've mastered it? Or are you in charge of changes that impact employees who may feel that way? Below are three things I consider before making a change.

•Identify where improvements are needed
•Involve people impacted by the change
•Implement it, if it meets your goals or is necessary

Technology

Some IT we have implemented

- Property Management Software (cloud-based): TOPS One https://www.topssoft.com/
- Mass Communication (FREE option): Mail Chimp https://mailchimp.com/
- Electronic Voting: HOAst (TOPS integrated) https://www.hoast-inc.com/



Communication

There's one of me and many of them…

Communication is a critical part of a CAM's routine. Balancing communication and reaching the right people, with the right message, is often the challenge.

Some techniques that have helped me:

•Keeping Your Team in "The Loop"
•Mass Communication – When, Who, How, and Why?
•Emergency Alert Systems – Reach many, quickly!

Communication

Reaching the Right People

Choosing the best form of communication is critical to your success. Consider the following:

•**Your Team** (The Board, Employees, Committees, Vendors, etc.): email, phone, or face-to-face. Keep them in "the loop".

•**Your Residents:** a mass email to residents who opt-in, newsletter, mailings, bulletin boards, website, phone, or face-to-face. This depends on how many people you need to reach and how quickly.

•**Balance** – Setting controls. Auto-response for emails. Detailed voice message for cell and office lines.

Communication

Sending the Right Message

You've decided which avenue to use, now to convey the right message.

•**Be Proactive**: Planning for communications is essential. Pre-made templates save time. Appropriate notice, timing is everything. Seek input, ask a co-worker or Board member to proofread your message and provide feedback.

•**Be Concise**– Wordy communications may lose the reader's attention.

•**Use the Appropriate Tone** – A professional and positive tone conveys leadership and builds trust. Avoid negatives. For example, if an improvement is needed create energy about how the change will benefit the residents.

Challenges

Opportunities to Learn & Grow

Challenges, they happen whether we are ready for them or not. We do our best to plan for the unexpected. However, it is difficult to foresee every situation. Frequently, it is the unexpected event that challenges us to reach new heights and provides an opportunity for growth. Your reaction is where your strength lies. It is what will enable you to turn headaches into opportunities.

A sense of humor helps too!

Now this just "quacks" me up!

Challenges

I've had my share

Community Association Managers are frequently juggling many things at once. What happens when we drop the ball or come across a new experience?

A few of my A-HA moments have been:

- **Hurricane Irma 2017** - Improved Disaster Preparedness Plan
- **Enforcement** - Overcoming Resistance and Getting Residents on Board
- **Creating the "A" Team** - Choosing the Right People for Your Team

Professional Connections

It woud be great to connect!

I enjoy connecting with managers and other industry professionals.

Please feel free to reach out via:

•Email – TDJforYou@gmail.com
•LinkedIn Profile: www.linkedin.com/in/tiffany-d-jackson

Closing Thoughts

"Seeing the positive impact you have on a community is the greatest reward of being a CAM."

Tiffany Jackson, LCAM, CMCA, AMS

Pamela L Coleman
CAM

About Me

- CMCA Certified
- Over 12 years Industry experience
- Bachelors in Psychology
- Masters in Business Management

AdvanceHOAManagement
Moving Communities Forward

- 3 Developer Accounts
- 2 Commercial Accounts

What Works?

Tips for Professional Success!

Be Honest, Be Genuine

- Don't make things up
- Don't make promises you can't keep
- If you are unsure - take a moment
  - Check with someone who knows or has had experience in the area
  - Check with an expert in the field
  - Respond in a timely manner, even if just to say that you are working on it.
- Learn to adjust and adapt

Take a Moment…

But I want an answer!

In a fast paced world everyone wants answers immediately. Emails and calls with questions that don't always have an easy or fast answer. It is ok to say that you need to do some research or check with a professional. Answering any question you are unsure of immediately just to appease the "I want it now" attitude may make everything harder in the long run. Don't cave in to pressure from a Board member or an owner about getting an answer immediately.

If it is a unique situation or something that needs to be reviewed in more detail, it is important to take a moment and make sure the answer is right or to double check and make sure it is right *for that particular community.*

If you don't know, admit it and then take the time to go find the answer. Don't leave them waiting for your call. Getting the right answer is always better than getting a fast answer.

Take a Moment…

But I want an answer!

I worked with a builder representative who was always very methodical. I learned a lot from him. He would listen to the owners, take notes and wait before he spoke. He did not try to jump in with the quick answer, or say what he thought they wanted him to say. If he knew the answer, he would say it. If not then he would make a note and get back to them.

In a large meeting he would sometimes pause and not say anything. In a lot of cases another owner or even the one asking the question, would come up with the answer and the issue would be dismissed. If he would have jumped in with the same answer he may have come across defensive. Giving the owner a moment to consider the question that was just asked sometimes made him think it through and realize that the answer was already there in the documents or the policies.

Psychology 101

Who are you working with?

Learning to adjust and adapt to different personalities is a must. Some owners/Board members want a direct approach (just the bottom line), others want more of your time. Pay attention to the difference and adjust.

Sometimes the brief, to the point answer is best. Other times it is important to let the person know that you have taken the time and found the answer and how you got there. Know your audience – learn how the Board or owners in a given community absorb information best.

Put yourself in their shoes. This is their community – their home. Consider how you would want someone to spend your money in your community. Consider how you would want the manager of your neighborhood to treat the assets and concerns. It's more than just a check on their to-do list.

Psychology 101

Who are you working with?

The same can happen with technology.

Some Board members come to the meeting with their laptops and have their information all on the computer, budgets in spreadsheets, and reports at their finger tips. So know your systems – and who might have theinformation.

Some want information in hard copy, taking notes with pen and paper. Make new technologies available, but don't shame or frustrate them.

Be competent knowing your systems. You may need to be their technical leader! But be grounded enough to help the less-sophisticated understand how to gain access to important information.

Oops!

I could have handled that better…

Hard Lessons Learned – what I have learned that has helped me that can help you:

•Double check emails
•Double check numbers
•Listen closely
•Read it twice

If you can, get a second set of eyes on reports that go out to your communities.

One More Time

Double Check!

I personally like to keep a clean email in box. I go through and look at my emails, answer the quick ones to get them off the list, and respond to those that need a little extra time to let the sender know that I am working on it. I struggle with the long winded emails, the ones that go on past the reading pane. I have responded to emails with the quick answer not double checking the entire email, not scrolling down to see that there were 3 more questions that I missed. It can be embarrassing when the Board member emails back asking "What about the rest of my questions?" I have learned the hard way to make sure I scroll to the bottom before responding.

Accounting is not one of my strengths so double checking numbers is always something I need to do. When I don't, it can hurt in many ways – it reflects poorly on me and the company I represent, and appears sloppy. It's their money. Act like you care.

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ww.ManagerOfTheYear.org

Additional Resources at www.ReserveStudy.com

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Paige Schauermann
Marketing Manager

PSchauermann@ReserveStudy.com

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