

Set the Tone for Teamwork In Your Association

By Sascha Macias, CCAM

As board members, you strive to uphold a sense of community. Your actions on behalf of your community can set a tone for the way your community lives and breathes. It is important that, as leaders, the board act as a cohesive group and lead by example to accomplish the overall community objectives.

All too often, homeowners, the board, and/or management can develop a relationship based on conflict and frustration. This can be a result of conflicting agendas, but more frequently results from a lack of communication or teamwork, which can be extremely counterproductive and hinder your ability to build a sense of community. By working together, the board and management can instill a sense of understanding and respect within the associations they manage and serve.

Here are some tips to encourage teamwork and productivity between board members and management that will extend to the membership.

DON'T PLAY THE BLAME GAME

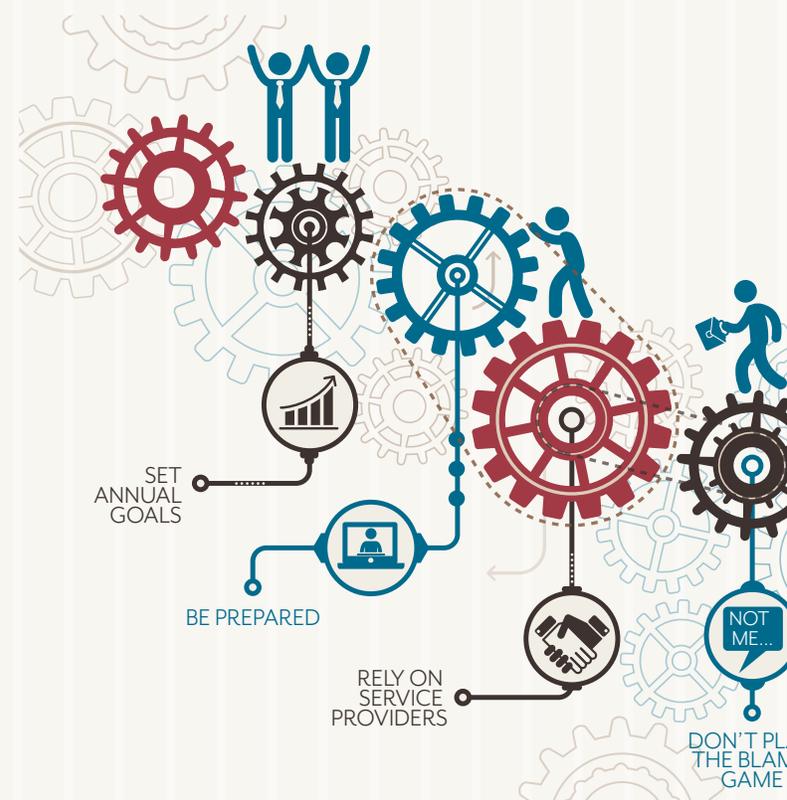
Within an association, it is imperative to provide a united

front to the community. When something goes wrong, or doesn't get done, it is easy to point fingers or place blame. In order to demonstrate a team attitude, the board as a whole is better served to accept responsibility and move forward. Any issues with follow-through between board members or management can be resolved during executive session.

This approach will also serve you well outside of meetings. Establish a protocol for whom to contact for items of concern. For example, if the manager is to accept plans and mark the received dates, as a board member, direct your fellow neighbors to the manager. If the management company is the contact for concerns, be sure to hear your fellow member, and direct them per protocol. This will ensure the board and management are seen as a team that works together for the good of the community.

SET ANNUAL GOALS

Annual goal setting is something that helps the board and management stay on track with upcoming projects and objectives. A good time to establish these goals would be shortly after an annual election, or even during the



annual meeting. Goals may include: cutting costs to refrain from raising dues; reserve projects; community improvements; a community event; annual vendor reviews, etc. This will allow management to have a clear vision of the overall view of the community from the board members' eyes and help the board stay on track throughout the year. Making this an open

session meeting will also allow the membership to see the board as being proactive and working as a team.

BE PREPARED

If using a professional management company, establish a set time for board packet receipt. If you would like to see the agenda and approve it before the packet is

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constructed, set a schedule for that as well. This will allow the management company to get you complete information in a timely manner, and help you hold the management company accountable for deadlines. Once your packet is delivered (five to seven days in advance of the meeting is recommended), review the packet as soon as time allows. If there are questions or concerns, relay them to your manager as soon as possible

so you can have complete answers and clarity on any issues before the board meeting.

This important step in preparing for the meeting is sometimes overlooked, but skipping this step can hinder the progress of the meeting. In addition, if a board member is unaware of what is on the agenda or if he/she is opening the packet for the first time at the meeting, it can make the process appear disconnected or send the message that management and the board are not in sync. Take value in having these materials early – review them beforehand and ask questions in advance.

Another reason it is important to review your packet before the meeting is to allow your manager time to gather the necessary information to answer all of your questions thoroughly. If your manager has your questions in advance, he/she can offer more detailed and complete answers at the meeting. In addition, having the information in advance can aid you in making more informed decisions. For example, you may have more in-depth financial or delinquency information regarding an item up for review. This will extend the appearance of open

communication, preparedness and teamwork, and allow everyone to provide a united front during the meeting.

ASSIGN TASKS TO “RESIDENT EXPERTS”

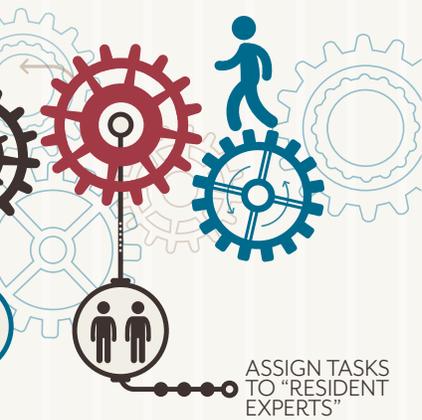
Boards are made up of people with diverse backgrounds and levels of expertise (e.g., the stay at home mom, the retiree, the professional business man/woman, or the first-time home buyer). We all have different skills to bring to the table, and assigning responsibilities or tasks based on individual strengths is an asset to the team environment. For instance, a CPA board member might serve best as treasurer; someone who addresses crowds well, the president; or an officer who pays attention to detail, the secretary.

This idea can also extend beyond officer positions. If the community is planning an event and a board member has event planning experience, he/she can be the point person. Conversely, if there is a board member who is home regularly, he/she may be available for management or vendor walks. Relying on each other’s availability and strengths can allow the board to function at the highest level of productivity.

RELY ON SERVICE PROVIDERS

While you turn to your community association manager for a myriad of advice and rely on fellow board members to implement their expertise for certain tasks, it is important to always refer to expert service providers for certain information or details. Associations employ many third-party contractors to perform work: CPAs, attorneys, reserve analysts, landscapers, roofers, pool vendors, etc. Relying on these service providers for accurate information not only makes the manager’s and the board’s job easier, but it also protects the association (and board members) from liability. If you can demonstrate that professional expert advice was relied upon in a decision, even if it turned out poorly, this can protect your association and demonstrate you followed your fiduciary duty as a board member. Following this practice protects the association, the board, and the manager as a team.

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