

Community Connections



Fourth Quarter 2019 • www.caisoco.org



Which community manager would you prefer?

By Danielle Holley with Hearn & Fleener, LLC

Which community manager would you prefer? A reasonably qualified, acceptable test taker who hasn't committed any violent or financial crimes or a competent, reliable, caring and proactively educated individual?

A valid argument (with significant body of proof in the CAI Southern Colorado Chapter) can be made that most managers are often both, but how would someone know? We have to tell them!

You've seen CAI promote credentials in a dozen different ways. There have been emails and press releases, and maybe you've seen CAI or even CAMICB on LinkedIn or Facebook, but do you really understand the value? You are a community manager or assistant here in Colorado. Maybe you had your CAM License though DORA or maybe you're so new to the industry that you missed it. Now is the time to show your worth and dedication to the industry.

The point of Community Associations Institute's credentialing is to establish that you are a competent, reliable, caring and proactively educated individual. Aren't those the qualities that homeowner leaders are seeking

for the management of their neighborhoods? For their million-dollar budgets? Aren't they the qualities that management company owners seek in job descriptions? The CAM License, with the best of intentions, worked to establish that all community managers be at the minimum: reasonably qualified, acceptable test takers who haven't committed any violent or financial crimes.

If you had your CAM (Community Association Manager) License through the state of Colorado, you had permission to operate as a community manager.

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Celebrating Community Unity

By Leah Shantz, 2019 Chapter President

As we close out 2019, I want to celebrate our Southern Colorado Chapter members. All of our members work hard to make us a chapter of inclusion and unity. At our education luncheons or special events, one is welcomed into a wonderful gathering of friends where we learn and collaborate with each other.

Congratulations to all of our committees and their hard-working volunteers; you accomplished so much for CAI SoCo. The work you are doing will benefit the organization for years to come. Your enthusiasm and excitement inspire all members to think outside the box and join a committee.

Thank you to our Business Partners & Sponsors; your generous support makes our Education and Special Events possible. The support you have shown over the years is unmatched. Words cannot express the gratitude we have for you.

2019 has been a wonderful year of developing relationships to the mutual benefit of the HOA Management Companies, Business Partners and Home Owner Leaders. The unity we display will keep our chapter vital and strong to face the challenges in the coming years. ♦

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Let's Transition Well!

By Melonie Marshall, CMCA®

I recently went to my first CAI Law Day. I am a “newer” manager, so my ideas are open to new perspectives, and I have some newer ideas myself.

The code of ethics showcase put on by Gravely Pearson was fun. Everyone was given a paddle with a green “thumbs up” on one side and a red “thumbs down” on the other. We had to pick a side with the paddle we were given. Wes Wollenweber and Lee Freedman took opposing sides on several presented industry “hot topics.” Each did a great job arguing the common perspective for that side. They did such a great job that I felt torn to support both.

The topic of how to handle information about a community when an association decides to switch management companies was one of the arguments that intrigued me. Who owns what information? One common side argues that everything pertaining to the association belongs to the association, while the other side contends that while the information belongs to the association, the way it was compiled belongs to that manager, and the software used cannot be shared with the next manager.

I had thoughts and comments about this argument, but I was nervous about raising my hand. When I finally got up the nerve, they were on to the next argument. Here are some of my thoughts: Perhaps the challenge of transition could have some simple solutions.

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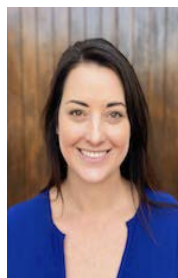
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Share what you would want shared with you.

Let's explore the compilation as a work of art. Hours have gone into organizing, adding notes to records, and having them easily understood by any office staff who may assist with tasks for that community. Your work is beautiful and perhaps considered a masterpiece. Then notice is given. It could be that the board has gone rogue and now jeopardizes the integrity or licenses of your management company, or perhaps, the board decided they would mesh better with a different management company. I know emotions can get in the mix. Leading up to the decision to change is tough on both sides. No two communities or situations are alike.

When it's time to hand over the association information, wouldn't it be great to present your masterpiece of carefully assembled information that speaks of your care and expertise? Then, if they have not executed records in such a high level of skill, they will be, at that time, challenged to up their game to come close to the bar you have raised. Providing great records can also reveal if the community you have been managing may have unrealistic expectations.

Can you pass it along?

Even with the best communication to homeowners, there are usually a few (sometimes more) who insist on sending their emails, assessments and complaints to the previous management company. If you are previous management, it could be easy to blow it off and say, "not my problem," but consider a different option, maybe even a better option: Pass it along!

This is another great time to consider the Golden Rule! Give it some time and you will get an association from another management company. It's tough enough just

getting to know the community, the board, new vendors, and which residents may be the squeaky wheel. Think of how awesome it would be to get an email from the previous manager, just to let you know that they have a stack of assessment checks ready for pick up! That's right! Almost feels like you won the lottery, right? Wow – you have that kind of power too! You could make someone feel like they won! Maybe someday there will be an opportunity for them to return the favor!

List it!

This one is just an idea of mine. Often, I am working on a list of active concerns for each community and have a status next to the task. Yeah, maybe it is my list, with my notes, but I won't be needing those if the community is changing management, and the next manager would most likely appreciate the history and perspective that these could provide.

Wouldn't it be great to think that all managers out there are creating, designing and taking care of recordkeeping masterpieces?

Keep it open!

Even though Colorado Springs is growing at an incredible rate, it is still small in many respects, especially in our close-knit industry. Boards change, management changes, and chances are we will continue to exchange associations and their information. Let's be approachable, reachable and responsive.

We can all transition with excellence! Perhaps these four basic guidelines can make every transition nothing less than stellar!

Building positive relationships with boards, homeowners and vendors is always at the forefront of our efforts. It would be great if those in management could all transition like Rockstars! ♦

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Soufflés and Old German Dudes

A conversation between Diana Davis with BluSky Restoration and Lisa Waltman

It was a casual conversation after a CAI monthly luncheon in late fall. You know, the type of conversation that every CAI meeting entices and builds upon over years of involvement. Sometimes it's continued business from the topic presented during lunch, but often it's time to just engage socially and laugh a bit. One of the most important, perhaps unadvertised benefits of being involved with CAI is the personal connection you can feel when you meet with this group of talented and diverse professionals on a regular basis. It was exactly that connection and diversity which spurred this casual conversation of the upcoming holidays.

"I'm going home for Thanksgiving," Diana said. "It is my daughter and her family's favorite holiday, but... no traveling at Christmas." As the Director of Business Development at BluSky Restoration, Diana Davis is all too familiar with the fact that the cold temps bring on a new set of mitigation, restoration and construction challenges.

"No kidding," I said. "My son from Denver, Matt, and I are heading to Dallas for Thanksgiving to see my other son, Rob, but Christmas will most likely be me and Mattie (which, if he were nearby, would prompt an eye roll that shows his disdain for still being called 'Mattie'hated at 6'4" and 29 years of age)."

"I think one of the things I enjoy most about the holidays are some of the traditions we had and still dabble in," Diana said. "See, when I was young, my mom was a Digital Computer Specialist with a Top-Secret clearance at Wright Patterson Air Force Base in Ohio," she said. "She

traveled all the time, so my dad did most of the cooking, EXCEPT for the holidays when mom ruled that kitchen!"

"I hate to state the obvious, but your mom's job was quite an accomplishment for a woman during that time." I said. "The computer specialist – not so much the kitchen."

"Yeah, well she loved it, she was good at it, and you know, it was all we knew," she laughed.

I asked her, "So, what did your holidays look like – what did you guys make during the holidays?"

"Well, I was in charge of crushing the crackers for the corn soufflé. That was probably a good choice for me as I wouldn't have trusted a kid like me with a recipe two pages long!" she said. "I didn't have the patience for it then and I still don't. You know what I mean?" she laughed.

"I hear ya," I said. "I was always given the task of measuring the shortening or margarine for cookies. I hated it. You know; scoop it out, get your knuckles all covered in it, then try to transfer it to a measuring cup, smash it down – getting more of it on my hands – and THEN, scoop it back out and put it in the bowl!" I said. "The worst job of all. I always wanted the breaking-the-eggs job. – How tough can that be?" I remember wondering. "Plus, it washed off with water!" I complained. "I don't think I was given the job of actually beating the ingredients together with an electric beater until I was married and had two kids!" I laughed with my typical sarcasm.

"You are so right!" Diana said. "My mom didn't cook that often, but during the holidays she was the woman to

know. I grew up in a small town, so we had more relatives than I could count. Everyone stopped by because “Aunt Chris” was cooking! She told me later in her life that all she wanted to do was to be a Fry Cook. I remember thinking, ‘Mom, you’re crazy!’”

“My mom was exactly the opposite,” I said (although all moms share that little bit of crazy – it’s mandatory for the job). “She actually became my mom, and that of my three older siblings, when I was 4ish? She is of German descent, but you would never know it from her cooking ‘skills’ (or lack thereof). We did follow a lot of German traditions like putting our shoes outside our bedroom doors for a German Santa Klaus to leave us oranges and mixed nuts to crack and shell. As you know, being from the grey skies of Indiana or Missouri, getting bright, fresh oranges or fruit of any kind, during December was such a treat.”

Diana laughed, “No kidding!” she said. “I remember we used to always get another present on January 1st, which was Kwanzaa, but I didn’t really understand it, then.” She went on to explain that Kwanzaa is an annual, week-long celebration which is held in the United States and other nations of the African diaspora.

“The African, what?” I’d never heard of diaspora, and I’d written a few words over my 30 years as a journalist.

“The African diaspora. Diaspora is when a group has been dispersed outside of its traditional homeland,

especially involuntarily, as were Africans during the world’s history of the slave trade,” she explained. “Kwanzaa is held in America as a tribute to honor African heritage in African-American culture.”

My mind drifted a bit to wondering what that must have been like. I wasn’t intentionally drifting on her words. In fact, my mind can easily drift from refinancing my house to

a cute puppy to riding my Harley and finally onto “Did I leave clothes in the washer?” I, too, am a mom with a sprinkling of crazy.

But this thought was of how incredible it was that two women from very diverse backgrounds and incredibly different family histories were sitting together in this beautiful room after a meal just shared. Regardless if we made cakes, cookies or a soufflé with our family during the holidays, or if a Kwanzaa gift was given or even if a fictitious old German dude snuck into our house and put food in our dirty shoes, we sat there in laughter imagining and clearly seeing the other as an excited little girl during the holidays.

That day, I left with more than just an education of the subject matter delivered during a CAI luncheon. I left with a greater understanding of the history of my friend, Diana. While our cultural differences of the past are real, significant and sometimes vast, they are also what helped to create a friendship of these two individuals sitting side by side today. ♦



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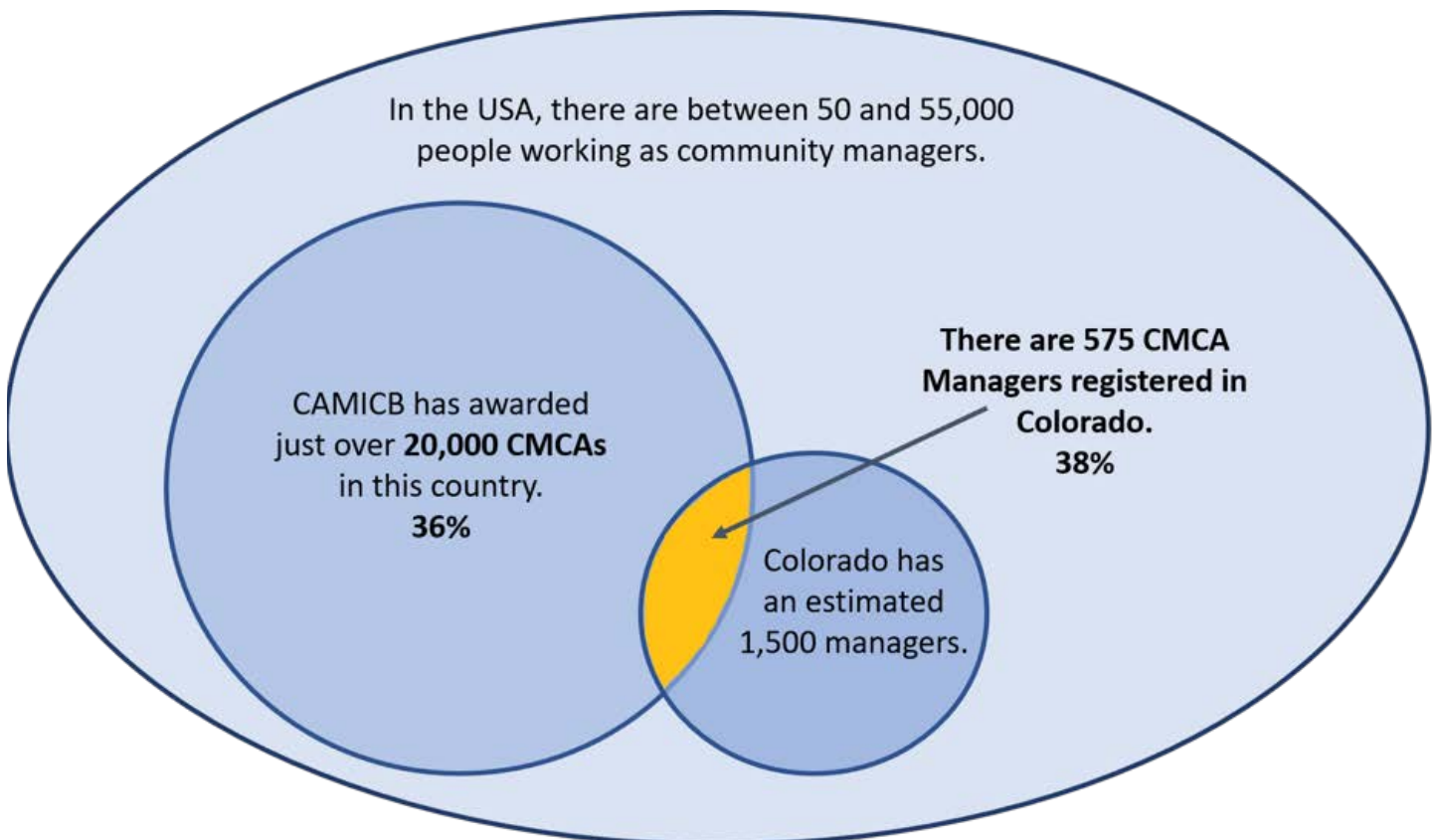
Consider this for a moment. As a homeowner, wouldn't you want someone with the CMCA or better to manage your neighborhood? Wouldn't you want someone who has done more than just the minimum?

Beyond the CMCA®, Community Associations Institute offers additional designations if a person is willing to work for and earn them. To become an Association Management Specialist® (AMS), a manager must be CMCA® certified, have at least two (2) years of verified experience in financial, administrative, and facilities management for at least one community association, and comply with the CAI Professional Manager's Code of Ethics.

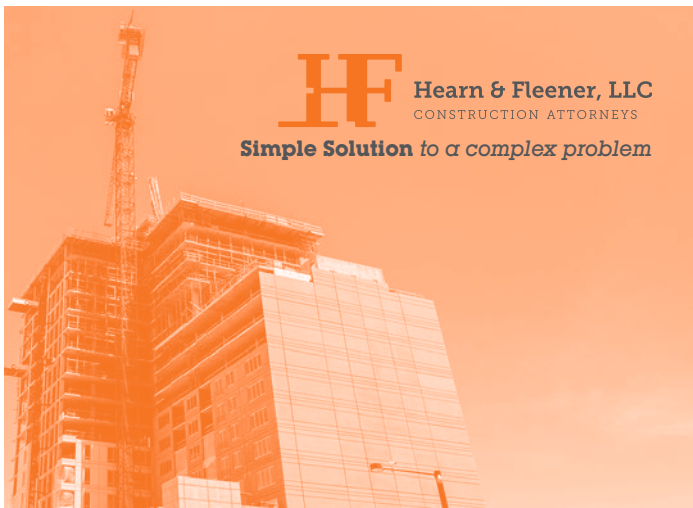
Then a person can earn their PCAM: the Professional Community Association Manager designation. This is a

class of managers who are the leaders in the community management industry. A manager cannot even apply for this designation unless they have at least five (5) years of verified experience as a community manager, have earned their CMCA, have passed several advanced association management courses and are in good standing with the CAI Professional Manager's Code of Ethics. Once they've applied to earn their PCAM® and are accepted, they have the opportunity to participate in a PCAM® Case Study where they spend two days assessing a community association previously unknown to them and then another month writing a paper analyzing the association according to strict criteria in compliance with their training. A panel of Professional Community Association Managers reviews and assesses each case study.

Think about the time and dedication these managers have to commit if they seek these designations. Consider the qualifications the next time you want to hire a manager – whether you're in leadership at a management company or volunteer on your HOA board. Community association managers who take the initiative to educate themselves and grow professionally have dedicated time and money to their careers and to their clients. In an industry so mired in negativity and which is inclined to focus on what we do not want, why wouldn't you consider what you do want and choose the competent, reliable, caring and proactively educated individual? ♦



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<p>The first step for a professional community manager to demonstrate the fundamental knowledge required to manage a community association.</p>	<p>The second level in the nationally recognized career development track for community association managers. The AMS designation demonstrates a higher level of understanding of the role of a community association manager and additional experience in the community association management profession.</p>	<p>The pinnacle of community association management. The PCAM designation is the highest professional recognition available nationwide to managers who specialize in community association management.</p>	<p><i>The AAMC accreditation demonstrates a company's commitment to providing the unique and diverse services community associations need. An Accredited Association Management Company ensures that their staff has the skills, experience, and integrity to help communities succeed.</i></p>
Requirements	Requirements	Requirements	Requirements
<ul style="list-style-type: none"> • Successfully complete an in-depth comprehensive training course covering the essentials of community association management or have 5 years experience of community association management or hold an active Arizona CAAM, California CCAM, Florida CAM, Nevada CAM, Illinois CAM, or Colorado CAM. • Complete and submit the CMCA application. • Pass the CMCA Examination; a 120 question, psychometrically sound examination prepared under national standards and guidelines to meet the requirements of a valid certification testing tool. • Comply with the CAMICB Standards of Professional Conduct 	<ul style="list-style-type: none"> • Pass the CMCA examination. • Complete two or more years of community association management experience. • Successfully pass two CAI M-200-level courses. • Comply with the CAI Professional Manager Code of Ethics 	<ul style="list-style-type: none"> • Pass the CMCA examination. • Successfully pass all six CAI M-200-level courses, plus the Case Study. • Complete five or more years of community association management experience. • Comply with the CAI Professional Manager Code of Ethics. 	<ul style="list-style-type: none"> • A minimum of three years of experience providing community association management services. • At least three full-time employees, one of whom is a manager. • A Professional Community Association Manager (PCAM) designee as the company's senior manager. • A staff of which 50% of managers hold a CAI or CAMICB credential (CMCA, AMS, LSM, or PCAM). • Maintain fidelity, general liability, and worker's compensation insurance in addition to meeting federal, state, and local laws. • Comply with the CAI Professional Manager Code of Ethics.
How to Maintain	How to Maintain	How to Maintain	How to Maintain
<ul style="list-style-type: none"> • Pay the annual service fee each year • Complete 16 hours of continuing education every two (2) years <p>*** The CMCA certification, administered by Community Association Managers International Certification Board (CAMICB).</p>	<ul style="list-style-type: none"> • Pay the annual maintenance fee each year • Redesignate every three years by meeting continuing education requirements [one CAI course (M-200 level or above) and 8 hours of other continuing education]. • <i>Maintaining the CMCA is not required</i> 	<ul style="list-style-type: none"> • Pay the annual maintenance fee each year • Redesignate every three years by meeting continuing education requirements - M-300 or M400 level CAI course or CAI Annual Headquarters Conference, Law Seminar or CEO-MC Retreat (see current redesignation application for details) • <i>Maintaining the CMCA is not required</i> 	<ul style="list-style-type: none"> • Renew accreditation every three years

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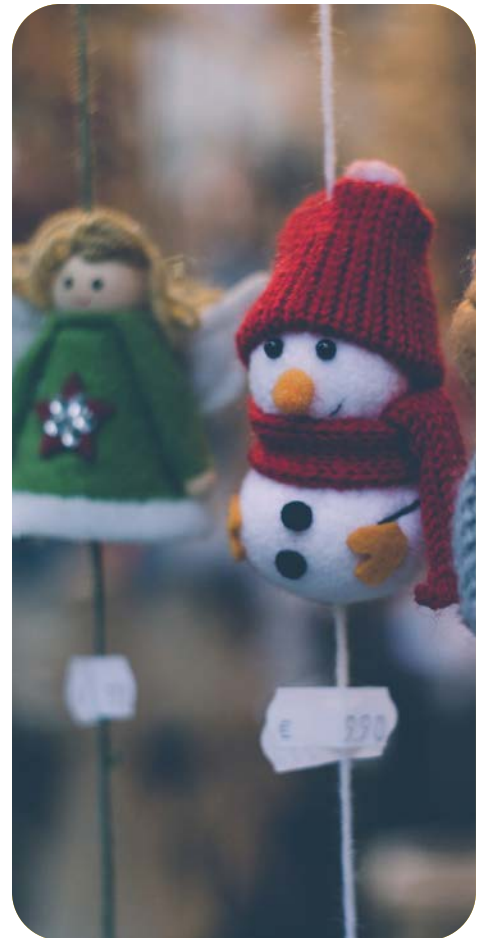
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2020 CALENDAR OF EVENTS



January 14	Education Luncheon: January Jumpstart
February 6-7	Manager Education: PMDP M330
February 11	Education Luncheon
February 19	New Member Breakfast
February 21	Manager Education: PMDP M203
March 10	Education Luncheon
March 19	Business Partner Mixer
April 2 – 4	Manager Education: PMDP M100
April 10	Bowling Tournament
April 14	Education Luncheon
April 18	Board Leadership Development Workshop (Essentials)
April 30	Speed Networking
May 12	Education Luncheon
June 5	Wild About Cheyenne Mountain Zoo Event
June 9	Education Luncheon
June 10-13	CAI National Conference in Fort Lauderdale, FL
June 25	Business Partner Mixer/Golf Clinic
July 17	Golf Tournament. Note: no education program in July
August 11	Education All Day: Law Day
September 8	Annual Meeting Luncheon
September 10 – 11	Manager Education: PMDP M204
September 14	CLACsic
September 24	Business Partners Present Happy Hour
October 13	Education Luncheon
October 14	New Member Breakfast
October 17	Board Leadership Development Workshop (Essentials)
November 10	Education Luncheon
December 8	Year-End Celebration, Awards, Install Officers & Auction

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