

Handout



Board Leadership Development Workshop

**Part 3 – April 14, 2021
Communications, Meetings &
Volunteerism/Professional
Advisors & Service Providers**

Speaker & Sponsors

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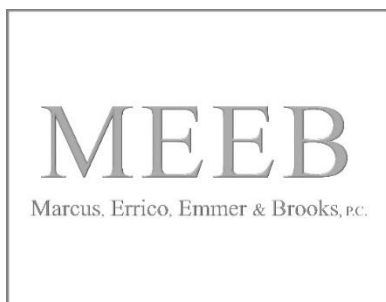
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Jared McNabb is the General Manager of the Brook House Condominium Trust in Brookline, MA a large mixed-use community of 787 units. He holds industry credentials including Certified Manager of Community Associations (CMCA) and Professional Community Association Manager (PCAM), the highest designation awarded by CAI. A previous CAI-NE board member and past chapter president, he is the current *Condo Media* president and has held that position since 2010.

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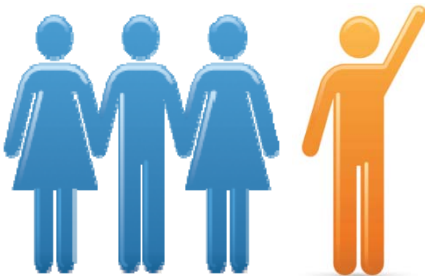
Did You Know?



- One in four Americans volunteer.
- Employed 35-44 year olds are most likely to volunteer.
- Those over 65 contribute the most hours.

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What Do You Think?



What percentage of volunteers do you think became involved after *being asked to volunteer* by someone already in the organization?

- a) 10%
- b) 20%
- c) 30%
- d) 40%

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Objective



You will learn to:

- Recognize factors for assessing board communication effectiveness

Communications

The Silent Killer

Communication problems could be dubbed the “silent killer of organizational effectiveness.”



Factor 1: Openness

Openness refers to a board communication strategy that encourages owners to share ideas, ask questions and make suggestions.

Openness:

- Fosters collaboration and mutual respect
- Helps leadership gain new insight



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Active Listening



Multiple research studies show we remember only **25-50%** of what we hear.

Listening is one of the most important skills leaders can have.

How well do you listen? Do you believe you absorb on average:

- a) 25% of what you hear?
- b) Between 25-50%?
- c) Between 50-75%?
- d) About 90%?

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Active Listening



A communication skill that builds understanding and rapport between the speaker and listener through a variety of techniques.

Techniques include:

- Eliminate distractions
- Observe body language
- Acknowledge what is being said by nodding or saying something like “I see” or “I understand”
- Repeat or summarize what you heard to confirm
- Ask questions for more information or to clarify

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Factor 2: Methods

The last two decades have revolutionized the ways we connect with others. In the past, the primary mechanism was the newsletter.

Many boards are still comfortable taking the traditional route.

According to research, demographics are changing.



Approximately 40% of the world population now has an Internet connection.

From 1999 to 2013, the number of Internet users increased **tenfold**.

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A Blended Approach



Integrates technology and traditional methods to increase convenience and communication speed and to decrease costs.

A blended approach may include:

- Electronic newsletters
- E-mail
- Letters/newsletters mailed to those who request printed copies
- Community association website
- Social media
- Automated texts/calls

Cautionary Notes on Methods

Make sure your distribution of information reaches the entire population, even if this requires duplication of effort.

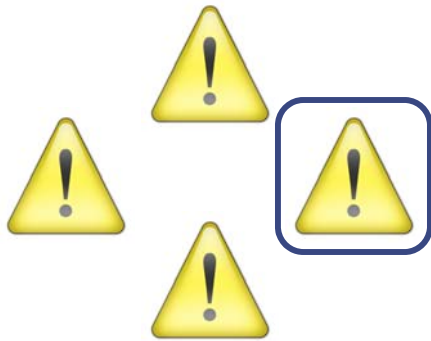


Whatever communication methods you choose, you'll want to be careful with how you use them.

Cautionary Notes on Methods

Use a communication method appropriate to the occasion.

If one-on-one communication is more suitable, then pick up the phone or have a face-to-face conversation.



Cautionary Notes on Methods

Never discuss association business or make decisions with another board member via e-mail. This could be construed as holding a “secret” meeting.

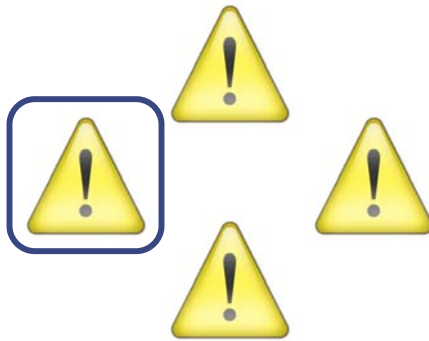
Remember, e-mail is never private. It can be forwarded without your knowledge.



Cautionary Notes on Methods

Be aware that website content reflects on the reputation of the community and has the potential to become public.

Consider adopting a policy regarding what is acceptable and what gets priority for website content, as well as for newsletter content.



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Factor 3: Tone

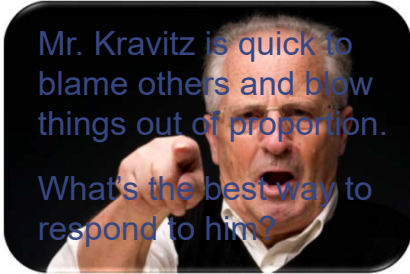


Power to:

- Build relationships
- Get things done through others
- Deliver news -- even bad news -- without alienating others

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Facing Anger



Mr. Kravitz is quick to blame others and blow things out of proportion.

What's the best way to respond to him?

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For every action, there is a reaction.

Plan the tone of your communications to elicit the response you want.

Factor 4: Frequency

Top complaints residents have are:

- Not receiving information in a timely manner or on a regular basis
- Hearing from the board only about meeting notices or rules violations



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Scheduling Communications



Establish a communication schedule and stick to it.

Share urgent news that impacts association members in a timely manner.

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Objective



You will learn to:

- Recognize requirements and effective practices in preparing for meetings, conducting meetings and holding elections

Meetings

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Meeting Requirements

Meetings must comply with:



Requirements vary by state, but generally address:

- Meeting notification
- Quorum
- Minutes

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Minutes



Minutes should **NOT** be a verbatim recitation of discussion.

They must be retained according to state requirements.

Minutes must include:

- Type of meeting
- Association name
- Time/date/location
- Whether a quorum was established
- Attendees
- Action taken on the previous meeting minutes
- Officer/committee reports
- Unfinished/new business
- Adjournment time
- Recording secretary's signature

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Types of Meetings



Board Meetings



Annual Membership Meetings



Special Meetings



Town Hall Meetings



Board Meetings

Only directors have voting privileges. Owners can attend, but not vote.

A quorum is necessary.

Minutes must be taken.

Board Meetings



Annual Membership Meetings



Special Meetings



Town Hall Meetings



Board Meetings

Purpose:

- Set policy
- Review operations
- Listen to residents; resolve disputes
- Plan for the future
- Vote on business issues discussed in **executive sessions**

Closed to owners; valid **only for certain reasons** prescribed by governing documents or state law. Minutes are **not** taken.

Board Meetings



Annual Membership Meetings



Special Meetings



Town Hall Meetings



Annual Membership Meetings

All owners are invited to attend and can vote. The meeting is led by the board.

A quorum is necessary.

Minutes must be taken.

Board Meetings



Annual Membership Meetings



Special Meetings



Town Hall Meetings



Annual Membership Meetings

Purpose:

- Comply with the governing documents and state statutes
- Report to the membership on actions taken during the current fiscal year and present the forecast and budget for the coming year
- Elect board/committee members
- Deliver reports
- Build relationships

Board Meetings



Annual Membership Meetings



Special Meetings



Town Hall Meetings



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Special Meetings

All owners are invited to attend and can vote. The meeting is led by the board.

A quorum is necessary.

Minutes must be taken.

Board Meetings



Annual Membership Meetings



Special Meetings



Town Hall Meetings



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Special Meetings

Examples of purpose:

- Focus on a particular item of concern or interest
- Vote on the removal of a director
- Vote on an amendment to the governing documents that can't wait until the annual meeting
- Reach consensus or resolve an issue

Board Meetings



Annual Membership Meetings



Special Meetings



Town Hall Meetings



Town Hall Meetings

All owners are invited to attend.
The meeting is led by the board.

A quorum is necessary only if voting is conducted.

Minutes must be taken.

Board Meetings



Annual Membership Meetings



Special Meetings



Town Hall Meetings



Town Hall Meetings

Examples of purpose:

- Give information
- Garner support for large projects
- Clarify unpopular decisions to settle community unrest
- Get feedback from residents

Board Meetings



Annual Membership Meetings



Special Meetings



Town Hall Meetings



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Parliamentary Procedure



Parliamentary procedure is a system of rules for conducting meetings in an orderly fashion.

Robert's Rules of Order is the most common in the U.S.

CAI offers a variety of publications on Robert's Rules.



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Meeting Preparation

The president determines the agenda with input from the other board members and manager.

Meetings should generally last no longer than two hours.



Tips for Productivity/Efficiency



1. Find an appropriate meeting place.
2. Set an appropriate meeting time.

3. Assemble/distribute a meeting packet for each director in advance.
4. Invite experts, as needed, to assist.
5. Insist all speakers address the chair rather than other speakers.
6. Avoid endless discussion; call for a vote.
7. Request that reports be written rather than presented orally.
8. Be committed to starting and ending on time.

Election Guidelines

- Check your governing documents for how nominations can be made.
- Check with your attorney on whether online voting or voting by proxy is acceptable.
- Conduct the election early in the meeting, so the outcome can be announced during the meeting.

- Consider appointing inspectors of elections to certify the process, if needed.



Objective



You will learn to:

- Ways to build volunteerism

Volunteerism

Tips for Recruiting

What motivates one person might have little impact on another.

Strong-arm tactics rarely work in recruiting volunteers.

Here's what does work.



Communicating the Need

Communicate the need repeatedly through a variety of channels.

Follow up with personal invitations. People to target include those who:

- Would be a good match
- Have been vocal about how things are done
- Are new to the community



Educating

Building skills and confidence can be addressed through various educational efforts, such as:

- Local seminars
- Newsletter articles
- Online testimonials
- Invitations to sit in on a committee meeting
- Recommended publications
- Online training
- Webinars



CAI Education Opportunities

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Promoting Community Spirit

Create a neighborhood assistance program.

Stage a block party to celebrate Halloween or the 4th of July.

Sponsor a safety seminar.

Hold a clothing drive to help a local charity.

Print association T-shirts and offer them as volunteer rewards or for sale.

Host a talent show.

Plan a progressive dinner.

Host a blood drive.

Schedule a poolside movie night or a musical jam session.



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Don't Give Up



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Objective



You will learn to:

- Apply effective practices for selecting people and companies for professional advisors and service providers

Finding the Right Candidates

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What Do You Think?



What do you think are the most common mistakes in selecting professional advisors and service providers?

- a) Deciding by price alone
- b) Hiring insiders
- c) Rushing into a decision
- d) Hiring under-qualified candidates
- e) Not defining the job adequately
- f) Not having a clear contract or agreement

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Job Criteria

Carefully think through the job criteria *before* approaching potential service providers so you can state exactly what you require.

If you experienced past performance that was unsatisfactory, use that experience to qualify what *is* satisfactory.



Job criteria:

A detailed description of the services the association needs and the performance the board expects

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Credentials



Consider the credentials that are appropriate for the required services.

Credentials provide assurance of a candidate's expertise, experience and level of commitment.

Use credentials to help:

- Find qualified candidates
- Evaluate candidates

Directory of
Credentialed
Professionals

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Requesting Responses

Select the approach that best fits your needs and resources.

RFPs:

- Require time/effort to put together
- Are recommended for professional advisor positions and for services that have the most impact on the association's operations and budget



Sending a request for proposal (RFP)

Sending letters describing the job and requesting information

Posting online advertisements

Making inquiries by phone

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Objective



You will learn to:

- Apply effective practices in evaluating candidates

Evaluating Candidates

Assessing Candidates on Paper

Look for red flags or areas needing clarification:

- Potential conflicts of interest
- Omission of information
- Rates outside the expected range
- Adherence to original RFP



The key word in assessing candidates is *consistency*.

Compare each candidate's credentials and experience to what you requested.

Preparing for Interviews



Narrow the field to the most promising candidates; then schedule in-person or phone interviews.

Be sure to include other board members at this stage.

Prepare for the interviews by creating a set of questions to ask each candidate, and, when possible, determine the ideal answer.

If appropriate, plan on giving a tour of the community. If relevant to the service or position, plan on discussing the governing documents.

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Evaluating Candidates



Look for the differences, the unique approaches, the experience and expertise that offer the best value to your association.

Consider:

- Candidates' personalities, but evaluate on the basis of job skills
- Rates or fees, but don't base your decision predominantly on this
- Familiarity with common interest communities

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Making Agreements/Contracts



Have an attorney review an agreement or contract to make sure:

- The best interests of the association are covered
- All terms are clearly identified
- Job/service criteria previously established are included

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Module Summary

- Recognize factors for assessing your communication effectiveness as a leader
- Recognize requirements and effective practices in preparing for meetings, conducting meetings and holding elections
- Describe ways to build volunteerism
- Apply effective practices for selecting professional advisors and service providers
- Apply effective practices in evaluating candidates
- Apply guidelines for extending an offer or accepting a bid

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CAI New England Chapter (CAI-NE)
www.caine.org

Community Associations Institute (CAI)
www.caionline.org

CAI Foundation for Community Association Research (CAI-RF)
www.cairf.org

Community Association Managers International Certification Board (CAMICB)
www.camicb

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