# Community Association Management Insider

Helping You Run Your Condo or Homeowners Association Legally & Efficiently

\$99.00

# Client Relations: How to Develop Your Ideal Roster

An Exclusive Special Report from Community Association Management Insider This report is provided as a research and reference tool. Although we make every reasonable effort to ensure that the information, analytical tools and data provided are useful, accurate, and current, we cannot guarantee that the information, tools and data provided here will be error-free or appropriate for your situation. This site and the information available through it do not, and are not intended to constitute legal or other professional advice. Community association management often involves complex decisions requiring the services of competent, licensed professionals; we urge you to obtain such services before making decisions with legal and other professional implications.

© 2021 Plain-English Media, LLC. All rights reserved.

Users are permitted to make one paper copy for personal, noncommercial use. Unauthorized reprinting, quoting, photocopying, duplication, transmission by facsimile, or incorporation into any information retrieval system, or any unauthorized use without written permission, is a federal offense with severe civil and criminal penalties.



# Make your association clients successful and your management business successful. We can help.

Sign up today for a **free trial membership to CAM Insider**. You'll discover:

- Updates on new laws and court cases
- Analysis with plain-English explanations of what these developments mean to you
- Model tools, such as letters to members, bylaws, and contractor agreements
- Exclusive Special Reports with in-depth information
- Articles with step-by-step management techniques
- Easy-to-implement solutions to managers' thorniest challenges.

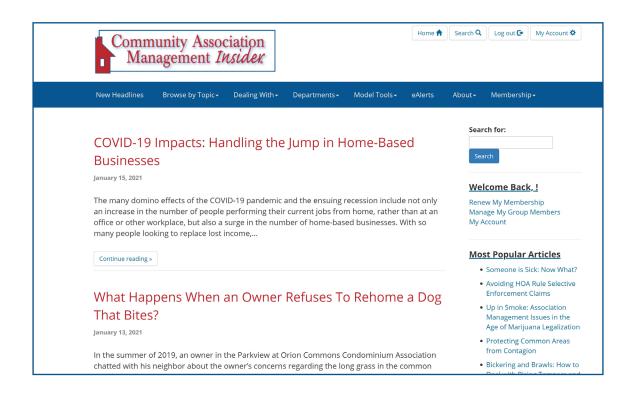
Community Association Management Insider will show you how to:

- Avoid liability and get indemnity
- Effectively and economically manage maintenance and repairs
- Get better deals from contractors
- Get the right insurance coverage
- And much, much more

#### Click here for quick FREE trial sign-up »

#### **About Community Association Management Insider**

Community Association Management Insider helps community association managers keep their co-ops, condominiums, and homeowner's associations running effectively and within budget — and all in the bounds of state, local, and federal law, as well as their governing documents.



### A Message from the President

Strong client relations with your community association clients are always important, but not always easy, to maintain. When times are tough economically, you can't afford to lose clients, but even when <u>finances</u> are robust, an unhappy client or former client can cause trouble for your future prospects.

That doesn't mean, though, that managers have to settle for rocky treatment from clients that are overly demanding, unappreciative, or even abusive. Concessions can be made for exceptionally trying times, of course, but wouldn't you rather develop solid, productive, and mutually satisfying relationships with your clients?

This Special Report aims to help you do just that. It provides valuable guidance on how to identify and land the right clients, establish and enforce boundaries, manage poor conduct, and leverage happy clients.

Best regards,

Mate

**Matt Humphrey** 

President

Plain-English Media

Publisher of Community Association Management Insider

# **In This Report**

A Message from the President4
Setting Yourself Up for Success — from the Very Start <b>6</b>
Contracting for Cooperation9
Managing the Unruly Client <b>11</b>
The Final Straw? To Terminate or Not to Terminate <b>14</b>
Leveraging the Strong Client Relationship
Appendix
Most popular articles on Community Association  Management Insider
Special Reports from Community Association  Management Insider

#### Setting Yourself Up for Success — from the Very Start

You can greatly increase your odds of assembling a profitable and pleasant portfolio of clients by incorporating this goal from the very beginning — in your marketing and your interview process.

#### **Marketing for the Right Prospects**

Katie Anderson, CEO of Aperion Management Group, LLC, which manages around 65 associations in Central Oregon, probably speaks for a lot of managers when she says she looks for what she calls "like-minded communities." What constitutes a like-minded community will vary, of course.

"Each company is going to be different — the owners' personalities, what they want to be known for, what they stand for — and so that's going to define who their ideal client is going to be," Anderson says.

"Every association has a personality and a reputation, and a good management company knows that going out of the gate," says Paul Grucza, director of education and client engagement for CWD Group, Inc., an association management company in the Pacific Northwest.

Anderson worked for a large multinational management company before founding Aperion. "They emphasized profit over people," she says. "The customer was always right regardless of if they were really wrong. I really wanted to make sure we work with clients I liked to work with and who respected the work I put in to become a professional."

Anderson invests heavily in <u>employee education</u> and charges a higher fee in exchange for her firms' expertise. And she emphasizes that expertise in her marketing, something she says many managers don't rigorously pursue.

"A lot of companies believe their main source of clients is referrals," Anderson says. "These companies are being reactive — for example, responding to bad online reviews — but not proactive. They don't dedicate resources to it." She acknowledges that it's not a high-margin industry but insists managers must find a way to take a more aggressive approach toward marketing.

"We actively market to the clients we want, and it's paid off," Anderson says.

Bear in mind that there's more to marketing than advertising, which many managers have found not worth the investment. Aperion, for example, has a board training that it holds throughout the year to target clients.

"If you know what you're doing, and you get in front of the communities whose managers don't," Anderson says, "the communities see that pretty quickly." The firm also has developed relationships with certain preferred developers that funnel it business.

"Each company
is going to be
different — the owners'
personalities, what
they want to be known
for, what they stand
for — and so that's
going to define who
their ideal client is
going to be."

**Katie Anderson**, CEO, Aperion Management Group, LLC

#### **Selecting Clients Wisely**

Ken Bertolucci, CMCA, president of NS Management in Skokie, Ill, which manages around 90 associations in the Chicagoland area, is one of those managers who relies on references — but that doesn't mean he settles for any client who walks in the door.

"The first time we meet with a board, one of the things I'm looking for is a match," he says. "I always tell them that I'm not looking for a client for two years; I'm looking for a client for 20 years or forever." It's not just talk — one of his clients has been with the company for 34 years.

"We're looking for boards where we can be their partner, their advisor, and their guide," Bertolucci says. "I spend a lot of time talking about values. We're looking for a board that understands and supports those.

"Early on in my career, I'd think 'oh, we can change those clients,' but if we don't have a fit in the beginning, we won't have a fit later on. And it's very disruptive to both sides to make frequent changes."

Aperion's selection process starts with a thorough vetting that includes a lengthy questionnaire and interviews. "We have to determine how the board functions, how they see the partnership with us," Anderson says. "For every one we say 'yes' to, we say 'no' to two."

Grucza says one of the most important inquiries to make of a prospective client is the number of managers it's worked with over the previous 10 years: "If they've only had one and want to make a change, we'll continue. If they've had three or four different management companies in that period, that's a red flag."

He also asks potential clients:

- Why are you looking for new management?
- What are some of the challenges you've had?
- How does the board work together? Do they get along well, or are heated debates common?

"We want to know what types of issues may be lurking that can have an impact on appropriate management," Grucza explains. "We don't want to find out after the fact that there's all this stuff percolating under the surface that's going to suck up time and effort."

He also considers how many hours an association will require, whether the manager pool has the bandwidth to take it on, and whether it's something the company truly wants in its portfolio — that is, whether the association will hurt the company's reputation or ability to serve to the association or other clients.

When Grucza recognizes that an association would require so much time and effort that the requisite price will be far out of the potential client's ballpark, he'll decline to take the association on. "If they're still interested, we'll explain how we came up with that number and then leave it to them to pick the 'a la carte' manager services.

"We want to know what types of issues may be lurking that can have an impact on appropriate management. We don't want to find out after the fact that there's all this stuff percolating under the surface that's going to suck up time and effort."

Paul Grucza, director of education and client engagement, CWD Group, Inc. "They go into it openly and willingly and with the understanding that they're paying \$X, and this is what they're going to get for it. If they need more services, they'll have to pay more. It's very fair and transparent, and it's worked very well for us."

Years of experience have helped Anderson identify some additional red flags on potential clients, including:

- Monthly board meetings. "Most of the time, these communities don't have enough going on to warrant monthly meetings," Anderson says, "but it's a sign they haven't put in place the processes for things to continue to operate smoothly between quarterly meetings." She prefers communities to have systems that allow presidents to make decisions between meetings or for managers to address issues that crop up.
- *Nighttime board meetings*. Aperion is moving away from evening meetings because of the burden on staff. "If a client isn't willing to shift the timing of their meetings, that's an instant red flag for us," Anderson says.
- High legal costs. "If an association has really expensive legal costs, we're going to ask what's going on." Is the board regularly in litigation with owners or third parties? Do the owners not understand the rules, so the board is using the attorney to explain them?
- Financial status. Anderson scrutinizes associations' financials to determine if they're on solid ground and adhering to sound business practices.

Careful screening can only so far, though. Managers also should protect themselves with their management agreements. ■

#### **Contracting for Cooperation**

n addition to screening potential clients more carefully, management companies can revise their contracts to reflect their expectations. Rather than assuming everyone is on the same page, they codify their expectations.

Aperion Management Group, LLC, which manages around 65 associations in Central Oregon, has developed its own code of conduct for boards, dubbed "board obligations" (See Exhibit 1). While the code ostensibly lists common sense rules, a disturbing real-life incident showed Katie Anderson, Aperion's CEO, they nonetheless needed to be clearly spelled out.

"A few years ago, a board president's wife got physical with me in the lobby of our office, and we wanted to terminate our contract," Anderson says, "but we realized it had a lot of language about what the client can expect from us and no language about our expectations for clients.

"A lot of the board obligations are industry standards and normal expectations, but what we found was they weren't what every board member walked into meetings with," Anderson says. She and her employees review the obligations during their initial meeting with a prospective client. "Boards that don't understand are people we don't choose to work with."

Brad van Rooyen, president of HomeRiver Group-Florida, which manages about 120 associations in the state, agrees. "It's unfortunate, but the world around us is changing, and I think we language in our contract about civility." (See the "Managing the Unruly Client" section for more information on the dealing with clients who become difficult.)

Matt Ober, a partner in the law firm Richardson Ober De Nichilo in Pasadena, Calif., suggests approaching a civility provision as an aspirational pledge to turn down the rhetoric and return to courteous and respectful norms. It's a way to indicate "this is how we want to govern and communicate," he says.

# **Exhibit 1. Aperion Management Group's Board of Directors Obligation**

Note: Managers should review the following with their attorneys before adding it to their contracts to ensure it complies with applicable local laws.

As volunteer members representing the Association, Agent requires that all members of the Board understand and abide by the following ethics and codes of conduct. These standards were developed in the spirt that all Board members agree to act consistently and reasonably. Therefore, all Board members must agree to the following:

■ Engage in lawful Acts. All Board members' actions will comply with the Governing Documents and current law. This may require thoughtful deliberation and input of knowledgeable persons and professionals.

"A lot of the board obligations are industry standards and normal expectations, but what we found was they weren't what every board member walked into meetings with. Boards that don't understand are people we don't choose to work with."

**Katie Anderson**, CEO, Aperion Management Group, LLC

- Maintain high standards of conduct. Directors' conduct should be above reproach and always avoid the appearance of impropriety.
- Demonstrate mutual respect. Directors and management will address each other, property owners, all the Agent's employees, contractors and vendors, with respect, even in the event of a disagreement. Belittling or abusive language will not be tolerated by any parties involved in Association business.
- The Board shall appoint a single point of contact to communicate any needs of the Association with the Agent, to ensure efficient communication for both the Agent and the Board of Directors.
- Attend all Board meetings. The Directors agree to attend scheduled meetings, unless proper notice of their absence is provided or there is a personal emergency. Effectiveness of the Board is based on keeping informed and making informed decisions. This is made possible by attending meetings where decisions are made.
- Be prepared. The Directors will be supplied with meeting information five to seven days prior to scheduled meetings. Directors agree to come prepared to meetings by reviewing the agenda and related materials prior to the meeting.
- Robert's Rules of Order. Directors will conduct all meetings in accordance with Robert's Rules of Orders, including respectful debate, attentive listening, properly recorded decisions, and clear direction to the Agent or its employees.
- Attend an annual training class to gain a better understanding of the responsibility, applicable state laws, and proven leadership needed to administer the Governing Documents of the Association.
- Maintain confidentiality. Directors agree to maintain confidentiality on all highly sensitive Association information including assessments, legal advice, and actions against individual owners.
- Directors will respect the Association Rules. All Board of Directors members will obey the Governing Documents and Association rules and regulations. ■

#### **Managing the Unruly Client**

The CAI's "Community Association Commitment to Civility" isn't a solution without a problem. From profane name-calling to fistfights, managers are reporting a jump in over-the-top behavior from board members and owners. Their anger and anxiety are spilling over, and they're directing their vitriol at each other and their managers.

#### **Meeting Mayhem**

"I used to love going to meetings, but my stress level goes up now, and I'm constantly scanning the room for <u>threats</u>," says Paul Grucza, director of education and client engagement for CWD Group, Inc., an association management company in the Pacific Northwest. "We never used to think about this stuff before, and now we have to."

Grucza has good reason to scan the room at meetings — he's witnessed the full gamut of bad behavior at and after meetings.

"I see physical altercations where owners accost board members when they don't like what they hear," he says. "I've had a knife pulled on me when talking about a special assessment. I've seen fruit, books, pens thrown at people. I've seen board members' cars keyed and packages of dog poop left at members' homes." In one case, some board members were beaten to the point of needing stitches.

You might think that more mature communities would be better behaved, but JoAnn Burnett, an attorney in the Fort Lauderdale, Fla., office of Becker & Poliakoff, P.A., hasn't found that to be true. "In the 55-and-older communities, people are out there with their canes and umbrellas, jousting and name calling. We've had people waving guns around.

"It's usually over crazy things," she says, "like 'his tree is encroaching, and I want it off!"

Managers take their fair share of abuse, too. "We see an incredible void of civility in dealing with managers," says Sandra Gottlieb, a founding partner of California homeowner association law firm SwedelsonGottlieb, "as if they're invisible and not sitting right there. Owners wave their fingers and literally will tell managers to shut up and 'you work for me!"

Richardson Ober De Nichilo in Pasadena, Calif. "All we want is to be heard."

void of civility in dealing with managers, as if they're invisible and not sitting right there. Owners wave their fingers and literally will tell managers to shut up and 'you work

"We see an incredible

**Root Causes** 

So what's behind this surge in hostility? Those on the front lines have some ideas. "There's this permission to be obnoxious and publicly confrontational, and we've stopped listening," says Matt Ober, a partner in the law firm

**Sandra Gottlieb**, founding partner, SwedelsonGottlieb

for me!""

Katie Anderson, CEO of Aperion Management Group, LLC, which manages around 65 associations in Central Oregon, points to the lack of consequences for owners and board members for bad behavior.

"The <u>board</u> isn't willing to draw boundaries on behavior," she says. "The owners think it's OK to cuss out our staff."

Grucza notes that tempers can run especially high at budget meetings or meetings about special assessments. "Money just flips a switch in some people," he says.

"I have boards that are afraid to meet," Ober says. "Elected officials are no longer able to govern, and managers are no longer to manage, because members don't want to be told what to do."

"I have boards that are afraid to meet.
Elected officials are no longer able to govern, and managers are no longer to manage, because members don't want to be told what to do."

**Matt Ober**, partner, Richardson Ober De Nichilo

#### **Combating Poor Conduct**

Boards and managers, including those that have yet to experience behavior problems, must plan ahead for potential disruptions, particularly when dealing with thorny issues like special assessments. In certain circumstances, they might consider bringing in backup.

"Some issues have to be addressed in an open meeting," Burnett says. "If we think there's going to be a problem, we have off-duty police come in. A lot of times, the board knows in advance there's going to be trouble because they've heard from the troublemakers before."

Some boards may feel handcuffed by open meetings laws, but they shouldn't. After all, they still have to conduct business.

"Yes, that's a statutory right," says Sandra Gottlieb, a founding partner of California homeowner association law firm SwedelsonGottlieb, "but, if you're attacking people, you can be shut down because you're interfering with the business of the board. It's hard for boards to understand that they need to act like a business, but that's what I tell managers — bring it back to the business side."

Unfortunately, some of owners come to meetings looking for a fight. That makes it essential to set expectations for conduct in advance. For example, when you're sending out communications, use them to push proper conduct.

"Something as simple as including a line about 'Let's remember to bring our best manners to the meeting next Tuesday' can help," Grucza says.

Of course, poor client behavior isn't limited to obnoxiousness. "You can have a toxic board that causes problems in the community or undertakes practices that fly in the face of, for example, a statute," Grucza says.

Grucza cites one case where he provided a board with his professional advice, only to have the board go a different route. "We didn't agree, so we made sure to note in the board minutes that we didn't agree."

"We have to say 'I understand that you think this might be okay, but I want you to understand that, as a licensed manager, I don't have a choice—we can't compromise on that. So if you want to do it, we can't continue to manage you."

**Ken Bertolucci**, CMCA, president, NS Management

Ken Bertolucci, CMCA, president of NS Management in Skokie, Ill, which manages around 90 associations in the Chicagoland area, reports that he's had clients ask his firm to do things that aren't legal or ethical, such as ignoring legal guidelines when making collections or failing to hold necessary meetings.

"We have to say 'I understand that you think this might be okay, but I want you to understand that, as a licensed manager, I don't have a choice — we can't compromise on that. So if you want to do it, we can't continue to manage you."

Which raises the question ... when should you terminate a client? Read on. ■

#### The Final Straw? To Terminate or Not to Terminate

Sometimes a problem client can slip under the wire, or doesn't rear up until after you're entrenched in the relationship, perhaps after a board turnover. "Obviously, board members change, and we've had situations where the board turned over, and we didn't really care to work with the new people," says Katie Anderson, CEO of Aperion Management Group, LLC, which manages around 65 associations in Central Oregon.

"Many times, managers are petrified to let go of a client because they see the dollars going out the door, but the decision is about more than the dollars."

Paul Grucza, director of education and client engagement, CWD Group, Inc. Assuming your contract provides for termination for cause (and it should), you have a decision to make.

"Many times, managers are petrified to let go of a client because they see the dollars going out the door, but the decision is about more than the dollars," says Paul Grucza, director of education and client engagement for CWD Group, Inc., an association management company in the Pacific Northwest.

"It's a quality of service and quality of life issue. Sometimes it's extremely healthy to just let go."

#### **Termination for Bad Behavior**

Brad van Rooyen, president of HomeRiver Group-Florida, which manages about 120 associations in the state, has terminated clients three times in his career because they weren't good fits. "It wasn't just one incident; it was a series of issues that continued even after addressing it with the board and assurances were made," he says.

The three terminations all involved the same circumstances, according to van Rooyen — a board without a quorum, no formal election, and a lack of volunteers. "The remaining members appointed a very strong-willed individual that put the rest of the board into the background," he says.

Grucza has terminated clients because of a "runaway board."

"It was just out of control," he says. "We pointed out the expectations for how board members deal with each other and with management and said there needed to be an immediate, tangible change in attitude and behavior." Spoiler alert: They tried and failed, so Grucza gave notice.

"We don't cavalierly toss aside a client," he says. "When it gets to the point that it's an untenable situation, we'll do everything in our power to make it tenable. It's a very carefully evaluated process to terminate a client.

"Sometimes no matter how hard you try, it just doesn't work out, and, for the benefit of both parties, you need to walk away."

Anderson had such a situation with the first client her firm ever fired, which turned out to be its very first client. The firm tried to work through it for 2.5 years but eventually gave up.

"The final straw was a particular board member who had not been very mannerly to us," she says. "He took over as president that year, and the behavior got worse. He was demeaning in meetings and publicly very cutting to our staff and the way they were working."

Ironically, Anderson reports, that client returned to Aperion last year, after going through three other management companies.

#### The Morale Factor

There's no bright-line rule for whether you should terminate a problem client, but employee morale is one critical consideration.

"Our staff know we'll always have their back if they're not treated right, that we walk our talk," Anderson says. "My employee is more important to me than this monthly management fee." The added benefit? "This approach creates a dynamic of trust and transparency with the staff. If employees screw up, they're going to tell us and give us the opportunity early on to fix it."

Van Rooyen endorses Anderson's employee-first approach: "If the manager feels he's constantly walking on eggshells, it's an obvious choice to protect our team. The association could be left in a difficult situation looking for another manager, but it's in our interest to protect good managers over clients. Without good people, you don't have a good company.

"If I don't make a stand, they employees are going to feel we're only bottom-line focused, and I can't be that. You take care of your people, and everything else will follow."

"You take care of your people, and everything else will follow."

**Brad van Rooyen**, president, HomeRiver Group-Florida

#### **Beyond Bad Behavior**

It's not always poor treatment that can prompt a management company to think about terminating a client. You also might reach that point when the amount of time spent greatly exceeds the value of the management fee.

"There are times when you get to the point that you're not really making money because there are just so many issues," says Ken Bertolucci, CMCA, president of NS Management in Skokie, Ill, which manages around 90 associations in the Chicagoland area.

He recalls one customer that had unrealistic expectations of what a manager does and wanted extra services without paying for them. "It was a long-term customer, so I wanted to cut them some slack," he says.

"I sat down with the board and explained that this is a low-margin business, so when you ask us to handle the leasing of units, managing tenants — we can't do that without a fee. They understood and nodded, but, four to five months later, they were still asking for all those things."

Bertolucci again reached out to the board president. "We ended up politely bowing out," he says. "We gave them three months to find themselves another manager." Interestingly, the client eventually became self-managed.

Bertolucci estimates that he's terminated fewer than 10 clients since he took over NS Management in 2010. "What I learned pretty early on is that you don't say 'yes' to a client if it's not a fit," he says. "We haven't terminated in a while because we've gotten better at screening." (See the "Setting Yourself Up for Success — from the Very Start" section for more information on screening clients.)

"There's no benefit in retaining for money the client from hell."

Paul Grucza, director of education and client engagement, CWD Group, Inc. Grucza cautions management companies against holding on to "bad" clients solely for monetary reasons. "There's no value in keeping what I call the heart-burn client. If it's a matter of cash flow — with the amount of time you put in trying to fix a client who's probably unfixable — you can make it up in a few months by finding a better client.

"There's no benefit in retaining for money the client from hell."

#### Why Wait?

Some managers don't wait for things to reach the point of no return — they regularly work to upgrade their client roster. One of Grucza's colleagues, for example, would review his client list every year and identify those that caused the greatest headaches.

"He didn't look at cost, just the quality of the client," Grucza says. "On an annual basis, he would purge at least 5 percent of his portfolio and give himself the opportunity to take on new clients he otherwise couldn't. That worked for him for years."

#### **Leveraging the Strong Client Relationship**

You work hard to find the right clients and keep them happy. That happiness leads to productive relationships, but it can lead to more if you know how to take advantage of it.

"Those clients are our best marketing team," says Ken Bertolucci, CMCA, president of NS Management in Skokie, Ill, which manages around 90 associations in the Chicagoland area. "Customers who are happy with you tell their friends who aren't happy with their management companies."

Paul Grucza, director of education and client engagement for CWD Group, Inc., an association management company in the Pacific Northwest, agrees about the marketing power of satisfied clients.

"You have to be pretty proactive in recruiting clients to say good things about you. Those happy customers translate into goodwill in the community."

**Katie Anderson**, CEO, Aperion Management Group, LLC "During 2019, I had over 900 board members go through some type of our monthly board training, which includes a boot camp for new members," he says. "They have friends in other associations that they tell. They really are my sales people with other people who live in other communities.

You can count on getting *bad* online reviews regardless of how good of job you do. It's inevitable, which makes it important to actively encourage your satisfied clients to put in the good word for you.

Katie Anderson, CEO of Aperion Management Group, LLC, which manages around 65 associations in Central Oregon, doesn't take it for granted that happy clients will spread the word. "We ask them to talk about us — review us online, provide referrals," she says. "You have to be pretty proactive in recruiting clients to say good things about you. Those happy customers translate into goodwill in the community."

#### Most popular articles on Community Association Management Insider

#### Someone is Sick: Now What?

The calls related to the coronavirus started coming earlier and earlier, says Sandra Gottlieb, a founding partner of California homeowner association law firm SwedelsonGottlieb. "As the death counts climbed in the United States, people were panicking. It was ratcheting up every single day, and I heard the terror." In the midst of a public health...

#### **Avoiding HOA Rule Selective Enforcement Claims**

Q: Do the courts hold an association responsible for enforcing every community rule? A: How strictly HOA rules are enforced varies from community to community. Some rules and regulations are necessary for a board to enforce, especially when a member creates a problem that could affect the health and safety of other members. In such...

#### <u>Up in Smoke: Association Management Issues in the Age of Marijuana</u> <u>Legalization Protecting Common Areas from Contagion</u>

This Special Report takes an in-depth look at some of the most pressing marijuana-related issues for community association managers and their clients and provides expert guidance on how to mitigate the associated risks.

#### **Bickering and Brawls: How to Deal with Rising Tempers and Incivility**

From profane name-calling to fistfights, we're hearing from experts that the behavior at community association meetings has been on the decline. Owners' anger and anxiety are spilling over, and they're directing their vitriol at board members, fellow owners, and managers. "The ability to contain oneself and act appropriately in a public forum seems to be...

#### **Coronavirus Creates Meeting Mayhem**

Community associations of all kinds, regardless where they're located, are subject to stringent requirements regarding board of directors and annual membership meetings. Strict compliance can pose a challenge for some associations in the best of times, let alone during a public health emergency. Social distancing protocols and prohibitions against gatherings make traditional meetings nearly impossible...

#### Know When to Hold 'Em: Document Retention for Community Associations and Their Managers

From governing documents and vendor contracts to communications with owners, community association boards of directors may feel like the constant deluge of paperwork is drowning them. "This can become a problem because community associations are required to keep a great deal more documents than any individual director is accustomed to in their personal lives," says...

#### **Delinquent Assessment "Acceleration" Policy Pays Off**

If the community you manage is considering setting an "acceleration" policy to cut down on the number of delinquent monthly assessments, make sure you know how it works.

#### **Preserve Common Areas from Wheelchair Damage**

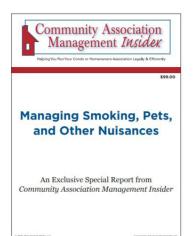
Q: Several community members, and, occasionally some guests, use wheelchairs. Because of the size and design of some of the common areas, the walls have been dented, paint has been scratched on the walls and doors, and corners and doorways have been nicked. There has also been damage to carpets and wood floors from wheelchairs. It has been expensive to repair wall and floor damage caused by those wheelchairs to the common areas. What can I do to prevent this damage?

# **Special Reports from Community Association Management Insider**



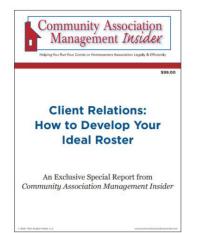
#### Navigating the Delicate World of Debt Collection: How To Collect What You're Owed, Even During Difficult Times

This Special Report provides expert advice on how you can increase the odds of collecting from every kind of debtor you and our clients may encounter. It includes insights on how to improve collections during both regular times and those periods when developments such as COVID-19 threaten the finances of wide swaths of owners. **Download now** »



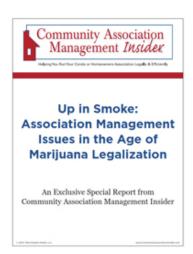
#### **Managing Smoking, Pets, and Other Nuisances**

Regardless of where you're located, or how long you've been in the business, the same types of problems tend to crop up over and over, don't they? It's not the big emergencies that make you pull your hair out, but the everyday hassles that start to grate when you get lots of people living together in the same community. Things like pet issues. And smoking. And the other chronic niggling nuisances that, over time, become a real pain in the neck. Which is why we've pulled together this Special Report specifically about managing these sorts of challenges. **Download now** »



#### **Client Relations: How to Develop Your Ideal Roster**

Strong relationships with your community association clients are always important — but not always easy — to maintain. As a manager, you don't have to settle for rocky treatment from clients that are overly demanding, unappreciative, or even abusive. Concessions can be made for exceptionally trying times, of course, but wouldn't you rather develop solid, productive, and mutually satisfying relationships with your clients? This exclusive Special Report aims to help you do just that. It provides valuable guidance on how to identify and land the right clients, establish and enforce boundaries, manage poor conduct, and leverage happy clients. **Download now** »



## <u>Up in Smoke: Association Management Issues in the Age of Marijuana Legalization</u>

Those states with legal marijuana have seen it rapidly commoditized, with new businesses such as delivery services cropping up and becoming a part of homeowners' daily lives. Not surprisingly, the proliferation of pot has begun to have repercussions for community association managers, both as property managers and employers. Whether you live in a state where marijuana is fully legal, partially legal, or on the cusp of some degree of legalization, you need to know what that means on the ground.

This Special Report takes an in-depth look at some of the most pressing marijuana-related issues for community association managers and their clients and provides expert guidance on how to mitigate the associated risks. **Download now** »

### Your Entire Team Can Benefit with a Group Membership to CAM Insider

As a member of Community Association Management Insider, you can add up to 9 additional people to your account ... *for no additional cost!* 

Each user gets his or her own username and password, and access to:

- **Updates** on new laws and court cases
- Analysis with Plain-English explanations of what these developments mean to you
- Model tools, such as letters to members, bylaws, and contractor agreements
- Exclusive Special Reports with in-depth information
- Articles with step-by-step management techniques
- Easy-to-implement solutions to managers' thorniest challenges.

#### It's an unbeatable deal! Start your Group Membership today!

