

Georgia Commons

A Publication of Community Associations Institute of Georgia, Inc.

Inside:

Best Practices when Planning for the Year

How to Best Partner with Your Community Manager

Best Practices for Spring Pool Opening

...and more!



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From the Chapter President



*"I am so excited to serve as
CAI-Georgia's first ever,
Homeowner Leader President!"*

I am honored to serve as your 2023 CAI Georgia President! It is with great pleasure that I welcome you to the "Best Practices" edition of the Georgia Commons Magazine. At CAI Georgia, we are dedicated to supporting and educating community associations throughout our state; we strive to be a valuable resource for board members, business partners, property managers and residents alike.

As I reflect on my 15 years of service as an active member of CAI Georgia, I am filled with a sense of encouragement, dedication, and pride in our Chapter. We've come together not only as individual members, but also as a community. Your CAI-Georgia Board of Directors and Executive Team remain confident in our Chapter's growth and direction. We are committed to providing value to all members, as well as future members through education and quality networking events.

I am so excited to serve as CAI-Georgia's first ever, Homeowner Leader President!

I started my career as a property manager and then served as a CAI Business Partner for 12 years within the Georgia Chapter. The past 4 years my career took me in a new direction, but I remain dedicated to the community association industry as a homeowner leader.

As your President, it is my responsibility to not only focus on the mission of our Chapter, but also to clearly communicate to all of membership our 2023 goals and how we plan to achieve them.

Some of our exciting and new initiatives for this year are:

- Business Partner Distinction Education Class to educate professionals on how to differentiate themselves in the community association marketplace
- Young Professionals Task Force to encourage the "next generation" of leaders in our industry
- Increase homeowner leader participation and membership through education and networking opportunities
- Continue to increase value to Business Partners, Managers and Homeowner Leaders with innovative ideas and platforms
- Strengthen communication across membership by continuing round table discussions through "Coffee with your President"
- Increase manager participation at all events
- Work closely with all committee chairs and chair elects to fulfill their committee charters and provide top notch events

We have a very exciting 2023 Calendar of Events! We have added two regional breakfasts scheduled for May and September in Cobb and Gwinnett counties. Also, for the first time ever, we will offer a business partner distinction education class! We will continue to provide meaningful and trending education topics for both our homeowner leaders and managers.

Our Chapter's success is a reflection of our dedicated members and Precious Metal Sponsors. Thanks to our generous sponsorships, CAI-Georgia is able to showcase and support membership.

On behalf of the CAI-Georgia Board of Directors, we thank you for your continued support and success of our Chapter. I am looking forward to serving you in 2023!

Jennifer Fournier
2023 CAI-Georgia President

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Access Management Group is proud of the strong legacy of consistent, successful community management around the Atlanta Metro area. Having long term relationships with our communities, employees and vendors enable us to excel for the betterment of over 275 Homeowner, Townhome and Condominium Associations. We pride ourselves in being experts of governing documents, covenants, bylaws, board and annual meetings, operating budgets, financial statements, assessment collections and much, much more. Our proven practices deliver first-class customer service to all residents. We work hand-in-hand with boards and homeowners to make your community a place you're proud to call home. Our goal is to protect and raise property values while building a trusted community.



bank along with the flexibility, commitment and superior service of a more specialized institution that is dedicated to the community association industry nationwide. Increasing Efficiencies Through Integrations and Technology - We understand that technology and software integration is key to your operational efficiencies and success, and ultimately helps you keep your clients and homeowners satisfied. Contact us today at 888-734-4567.

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community association managers and accounting staff are ready to partner with your Board of Directors to meet HOA challenges. Whether it is financial or full service we manage it all. Professional accounting assures your community's financial resources are managed and utilized to maximize community benefits. Customized financial services, cash management, accounting and detailed reports provide up to date information. AMAG will make a positive difference in your community.

Association Management Advisory Group, Inc. is community management at its finest. Homeowner Associations are our specialty. We provide tiered levels of service from financial only to full service, or customized Homeowner Association Management. Our licensed, professional community



lives of families in your neighborhood. Our services include Accounting and Administrative as well as Property Management and Facility Maintenance. Our experts will help your community stay on top of Covenant Violations and Modification Requests. We will tailor our services to fit your needs! Tell us how we can work for you! www.atlantacommunity-services.com 770-904-5270

As one of the top community association management companies in the south, Atlanta Community Services (ACS) will provide the services and support to build a strong and stable community association. Our professional and personal approach will help improve the



remediation, insect and disease management, consultation services, and many other tree related needs. Call us today to see how we can help improve your assets!"

Arboguard Tree Specialists has been providing Georgia with quality Tree Care since 1981. Working with property managers, community associations and homeowners, our team of ISA certified arborists is equipped to handle all aspects of your property's Tree Care needs including proper pruning practices, removals, hazard mitigation, tree healthcare including soil



Communities). The ALG Staff offers a Century of Experience, with Quality Services, Communication, and Proactive Management (that is second to none)!!!

Atlanta Landscape Group is a Commercial Landscape Contractor specializing in offering Landscape Services for Master Planned Communities in Metro Atlanta (including HOAs, Multi Family, Townhome, and Condo



highly skilled and experienced professionals, we have the expertise and resources to handle all of your HOAs project management and preventative maintenance needs.

Avid Contractors is a premier general contracting company specializing in HOA project management, CapEx projects, insurance claim management, work order management and property maintenance. With a team of

We pride ourselves on our attention to detail and our ability to complete projects on time and within budget. Through our network of qualified contractors, we're here to ensure your community receives the highest standard of workmanship. Check us out online at www.avidcontractors.com or give us a call at 833-GET-AVID.



and robust expertise to oversee a property of any size or complexity. Our professional team has dealt with virtually every facet of real estate, giving us the experience that will materially improve your property.

Beacon Management has been ranked by the Atlanta Business Chronicle as one of Georgia's leading management companies for the past eight years. We deliver added value, quality service, competitive pricing,

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the Atlanta area. Our professional renovation specialists incorporate expert customer service and communication to ensure that our clients are completely satisfied, and consistently exceed our client's expectations. Our renovation specialists and knowledgeable project managers work closely with condominium, townhome, and HOA community property owners and managers to ensure every project is completed quickly and to the highest standards. We are your partner for capital improvement solutions.

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Bouvier Insurance is a family-owned, full service independent insurance agency established in 1959, specializing in community association master policies. We provide unparalleled service to our clients and communities as the insurance partner to more than 2,000 community associations. With locations in Georgia, Tennessee, Connecticut, and Rhode Island, we have developed and partnered with the country's leading habitational insurance carriers to offer unsurpassed value, commitment, and exemplary customer service. Above all else, our agency will continue to stand by our outstanding reputation and founding values of ethics, integrity, and honesty. For more information call 877-817-1747 or visit binsurance.com.



We bring your property a team of experts: horticulturists, irrigation techs, designers, and arborists, who offer unmatched experience. We have developed cutting-edge tools: BrightView HOA Connect - an online portal for communicating with our community association customers; our Quality Site Assessment (QSA) reports - combines a punch list with images of the issues being addressed. Reach out to our team members in metro Atlanta & Savannah for details.



Brown & Brown, established in 1939, is the fifth largest insurance brokerage in the nation and the largest Property & Casualty broker in Atlanta. Our Atlanta office has an entire division dedicated to community associations. We truly differentiate ourselves by remaining independent with our management company partners and the 40+ insurance companies that we represent. We are fully equipped to build the most effective insurance program specifically designed for each association. For a free consultation and program evaluation, please visit bbinsurance.com or call 770-952-7725 to speak with one of our licensed agents.



Cobb, Olson & Andrie, LLC is a full-service litigation and real estate law firm focusing on the needs of homeowner's associations in the Atlanta area and all of Georgia. We represent boards of directors with covenant drafting, amendments and enforcement. Our firm is passionate about collections! Recognizing that assessments are the lifeblood of an association, we aggressively work to secure judgments and use custom collection tools to hunt for assets and foreclose on association liens if necessary. Retainer clients receive discounted collection packages, news alerts and complimentary board training provided by our attorneys. www.coalegal.com.



As a locally owned and operated business headquartered in Atlanta, GA, Colony Roofers' team are experts in providing affordable roofs and great customer service. Our employees are handpicked for their experience, hard work, and integrity. We specialize in residential and commercial roofing systems, and work tirelessly to provide customers exceptional quality and value. Our attention to detail is among the best of Atlanta roofers, and we stand by the quality of our work by offering rock solid workmanship. We offer assistance with roof replacement, repair, and gutter services.



"Community Association Management, LLC is led by Lee Mason, who is both an attorney and community association manager. Mr. Mason simplifies the operations of neighborhood associations by combining legal and managerial services into one setting. Usually, associations must hire a management company for day-to-day operations and an attorney for any legal issues. Mason's clients get complete managerial services along with the counsel of an experienced community association attorney. It's what sets him apart in this industry. Having a strong association with quality management and legal services protects investments for homeowners and helps ensure that property values increase over time."



For more than thirty years Community Management Associates has provided professional association management services throughout Alabama, Georgia, Florida, South Carolina, and Tennessee. We bring many assets to every association we manage including first-class customer service, proactive, experienced management, and cutting-edge technology.

Whether your association is large or small, a mid-rise or high-rise condominium, co-op, master planned community, or a commercial association office complex, CMA delivers professional, effective, and cost-efficient management—customized to your association's requirements at a price you can afford.



Coulter & Sierra, LLC specializes in real estate law and our practice areas include community association law, real estate development. Our attorneys are active on both the local and national level with the Community Associations Institute. We provide hands-on service and practical advice to build a long-term relationship with our clients. Our knowledgeable staff has years of experience dealing with a variety of real estate related issues. Learn more at www.coulter.sierra.com



Crabapple LandscapExperts is a full-service commercial landscape company founded 30 years ago by Georgia native, Bill Coleman. Originally a garden center in the early 70's, Coleman bought Crabapple in 1992 and targeted commercial landscape maintenance efforts toward community associations.

This rings true today as community association landscape maintenance has become cornerstone for the Crabapple brand. Over the last 17 years, Crabapple has expanded its landscape maintenance portfolio into business parks, retail/mixed-use, hospital campuses and industrial parks. Our services include landscape maintenance, lawn care, build/design, irrigation, floriculture and landscape enhancements. Crabapple is one of the few locally owned commercial landscape companies that has remained on Atlanta's Business Chronicle's top 10 list for the last 19 years.



Dreher Insurance is an Independent Insurance Agency dedicated to providing exemplary service and education to our clients. Our focus on community associations has provided us access to unique industry carriers; enabling us to match our clients to policies according to their specific needs. The Agency is family owned ~ operated (for 22 years), with a supportive licensed staff to patiently serve our clients. Agents are available to board members, and association managers; setting up virtual meetings, or presenting to the entire community pertinent insurance content. Our goal remains to deliver each client the best value and service for their insurance dollar.



Epic is your dedicated disaster preparedness, response and recovery crew. We partner with businesses and communities across the southeast, offering a suite of services from assessments and training, to full restoration and construction. With a watchful eye and forward thinking solutions, our team is always a step ahead of what's next and committed to safeguarding people and rebuilding lives. We can't predict disaster, but we can be prepared, bring everything we've got and bring it fast.

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The GCM Difference is our people-friendly approach and culture of "care" that is integrated into everything we do. Our staff is friendly, knowledgeable and our technology is top notch. We drive through your neighborhood in a GCM wrapped vehicle, so your homeowners have "peace of mind". Our commitment to our Associations is also demonstrated by our simplified contract terms including a 30-day cancellation with or without cause. GCM achieved the Accredited Association Management Company designation from CAI and received the Trustdale certification. For over a decade we have been honored to serve HOA and Condo Associations throughout Georgia making Association living simple and enjoyable! 770.554.1236 | www.gcmngt.com



Homeowner Management Services, Inc. has been committed to serving Community Associations since 1993. HMS is locally owned and operated and has again been named Best of Forsyth and a Top Ten Management Company by the Atlanta Business Chronicle. As an Accredited Association Management (AAMC) staffed by accredited management professionals, HMS managers are given the support of an administrative and accounting team so they can focus on managing your community. We offer cutting edge technology and services to our clients. By providing a full menu selection of management services, associations can customize services to suit community needs. Call on HMS for Respected, Responsive, and Reliable services.



Lazega & Johanson is the premier law firm specializing exclusively in the representation of condominium and homeowner associations throughout Georgia. Our team of experienced attorneys and paralegals are problem solvers who focus on proactive, practical and cost effective approaches for our clients. We also offer unmatched assessment collection results, with two exclusive programs which make assessment collection economical for every community. Our Free Collections Program has absolutely no cost for initial collections, and our Contingency Collections Program offers a no-risk collection option. Let us help your community today! www.LJLaw.com.



Lueder, Larkin & Hunter has specialized in community association law since inception. Our practice team structure, leveraging the benefits of technology, makes it possible to marshal all the resources our clients require to advance even their most ambitious legal objective. We offer multiple billing arrangements because each community association is unique, and the simple fact is that there is not one approach that works best for all communities. Our goal is to provide unparalleled legal services with the rate structure that works best for your association. We know community associations. We invite you to get to know us.



National Cooperative Bank (NCB) provides banking solutions for housing communities nationwide. With over 40 years of experience, NCB offers a full suite of banking products and services uniquely tailored to the housing market - including cash management, investments, and financing options. Currently, NCB has more than 3,000 relationships with housing communities and their respective property management companies. Call or text us today at 559-HOA-LOAN or visit www.ncbassociationbanking.coop.



Naturescapes delivers commercial landscape services across the greater Atlanta and north Georgia region specializing in homeowner association communities, commercial buildings and shopping centers. Since 1983, our teams wake everyday with an unmatched commitment to deliver the highest quality landscaping service in the industry.

As one of Georgia's top landscaping companies, we have cultivated long-lasting relationships with HOA boards, property managers, and property owners. Now, as a part of the yardnique family of landscape companies, we have enhanced our capabilities and look forward to creating new relationships. Ready for quality landscape service from Naturescapes? Give us a call today 770-923-7023.



NGLM is a full-service landscape firm in Atlanta. We offer award winning design/build services for residential and commercial clients. We also offer complete landscape and grounds management programs to commercial clients. NGLM has the capacity to take any project from inception, through construction, and into completion - and then maintain the property for years after. NGLM's turnkey landscape design/build and management services are offered to you using our award-winning crews and designers. Our job is to make the life of our clients easy. We aim to take as much off of your plate as possible. Your satisfaction is our success!



Northwest Exterminating is a family owned and operated pest control company that was established in 1951 by L.A. Phillips and his wife, Emma Lene Phillips. The company was founded on the values of honesty, integrity, and excellence. Today these values remain the core of Northwest Exterminating as we have grown from a family of 2 to a family of hundreds of team members and multiple service centers throughout Georgia and Tennessee. Our Community Association Team specializes in customized and effective termite control, pest control, mosquito control, wildlife services, lawn care, insulation, and HVAC services for your properties.



NowackHoward, LLC is the premier law firm specializing in community associations in Georgia. Led by attorneys with unmatched experience, NowackHoward is driven by a passion for protecting the rights and improving the operations of community associations. NowackHoward represents clients regardless of size or location. The firm provides the full range of legal services, including general counsel; governing document interpretation and amendments; covenant and rule enforcement; assessment collection and lien foreclosure; association meetings and parliamentary guidance; insurance claims, coverage and defense; contract review, negotiation and disputes; Fair Housing Act claims; zoning; and construction defect and general litigation. Please visit www.NowackHoward.com to learn more. The Counsel Every Community Needs.



P3 Painting & Renovations specializes in large community-wide projects for the Homeowner, Townhome, and Condo Association Communities and has completed over 10,000 projects. Our team of professionals has extensive experience in the general contracting industry and understands that each project deserves unbridled attention to craftsmanship and quality. P3 is a Licensed General Contractor and uses only the highest quality products to provide long lasting results. All P3 projects include dedicated project managers, detailed bids and a comprehensive scope of work, competitive pricing, and quality work and products. Our services include painting, masonry/concrete/stucco, pressure washing, carpentry, major renovations, and amenity renovations.

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"RealManage acquired GW & Associates in 2019 and continues to provide a local community management team backed by an extensive back-office support staff and the absolute best in proprietary condominium and HOA management technology that provides a level of detail and transparency that is not available anywhere else in the industry. Located in Gwinnet county, RealManage provides personalized local service to the greater Atlanta area and are excited to be a part of your community."



Remediation Group, Inc. is a fully licensed environmental, restoration, and remediation firm located in the heart of Atlanta. 24 hours a day, 7 days a week, we are readily equipped to respond to your emergency and restoration needs. Our mission is to prevent further damage from occurring to communities by putting a swift plan into motion and providing managers and HOA's with a partner as each loss is navigated. Our staff is comprised of individuals who carry a wealth of experience and expertise. Most importantly, Remediation Group understands the value of relationships and provides our clients with information based on current standards and regulations needed to make wise decisions, limiting liabilities for all parties involved.



Roof it Forward focuses on providing excellence in roofing, gutters and insulation for single family, multi-family, HOA's and Property Managers. We are dedicated to providing expert consultation, exceptional customer care and the best workmanship in our industry while giving back to the communities we are blessed to serve. At the core of our mission statement we have committed to volunteer our time to give back a portion of every dollar we earn to organizations that fight childhood cancer. When you chose to partner with us on a project, your money goes further than just getting a quality job... We Roof It Forward!



Russell Landscape Group offers a complete range of professional landscaping services for HOA, condominium and commercial properties in Atlanta, Charleston, Destin, Hilton Head, Nashville and Savannah. Russell Landscape Group is a leader in southeastern landscapes and is listed in the top 100 commercial landscape contractors in the country and proudly supports CAI and its mission to support all community associations.



Shaben & Associates will introduce you to innovative programs that can save time and money. We help you find the right vendors to partner with to meet your association's special needs. We assign a licensed Community Association Manager to work directly for your Board of Directors to oversee operations and financial matters; developing budgets and monitoring their status; managing staff and maintenance needs; creating community newsletters, websites, and so much more.



Silverleaf Management Group provides community association management to homeowner and condominium associations in metro Atlanta. We combine innovation with a high-level of customer service to provide a unique and effective solution for community management. We support communities of any size and provide professional community management services accentuated with personalized attention. Silverleaf is proud to hold the Accredited Association Management Company (AAMC) designation and our manager credentials include Association Management Specialist (AMS), Certified Manager of Community Associations (CMCA), and CAI's highest designation, the Professional Community Association Manager (PCAM). At Silverleaf, if we aren't exceeding your expectations, we aren't working hard enough!



SuperHero Fire Protection is a full-service fire protection company providing installation, inspections, service, and maintenance for your Sprinklers, Alarms, Extinguishers, Hydrants, and Monitoring needs, using the highest quality of products and workmanship. We treat every customer as if you are our most important customer, no matter how big or small, and we're here to SAVE THE DAY.



From award-winning design, maintenance, installation, and long-term horticultural care, The GreenSeason Group is an accomplished, full-service landscape provider. Over the past two decades, The GreenSeason Group has had the privilege of serving both residential and commercial customers throughout the southeast. We attribute our continued success to the men and women who commit their time, talents, and passion toward fulfilling our shared vision.



WINTER CAPRIOLA ZENNER
attorneys at law

WCZ understands that a client relationship built on collaboration and communication is fundamental to business success. Our team of experienced professionals works closely with association boards and community association managers to accomplish their goals in a cost-effective manner. We bring to associations the knowledge and experience needed to resolve problems without litigation, if possible, and through litigation, if and when necessary. Our team of attorneys and collection paralegals is without parallel in the industry. At WCZ, we create value for our clients. WCZ is very active in CAI and proudly supports the Georgia Chapter as a Platinum Sponsor.



WJE is a global engineering and architecture firm specializing in facades, roofing and waterproofing, parking structures, and various construction administration services. From investigations of existing facade and roof assemblies to the design and construction of water-tight, energy-efficient, and high-performance building enclosures, to questions of structural integrity, WJE's experienced engineers and architects diagnose and solve problems ranging from small buildings to large infrastructures, in both contemporary and historic structures. Chances are, if your building has an issue, we have seen it before—and if not, no firm is more qualified to break new ground in finding a solution.





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Executive Director
Tina Saadat

OUR MISSION:

The Georgia Chapter of CAI is the voice of the community association industry in the state. Our purpose is to facilitate the professional creation and operation of community associations through the delivery of high quality education for our multidisciplinary membership. We are committed to building cohesion, integrity and respect.



The materials contained in this publication are designed to provide accurate, timely and authoritative information with regard to the subject matter covered. The opinions reflected herein are the opinion of the author and not necessarily that of CAI. Acceptance of an advertisement in *Georgia Commons* does not constitute approval or endorsement of the product or service by CAI. CAI-Georgia reserves the right to reject or edit any advertisements, articles, or items appearing in this publication.



To submit an article for publication in *Georgia Commons*, contact Tina Saadat at (770) 736-7233.

Mission Statement:

CAI-GA Mission Statement:
 Developing professionalism in the community association industry through education, advocacy and business networking.

Vision Statement:

To be the voice of community associations throughout the state of Georgia.

Best Practices When Planning for the Year

By: Bill Pope
Yellowstone Landscape

Welcome to 2023! Welcome to new opportunities. With new opportunities comes new challenges. And, in today's challenging business climate, it's more important than ever to implement values of using best practices when trying to grow your business, improve margins, retain valued employees and improve relationships with your vendors.

What are "best practices"? As described in a recent article, best practices are "sets of methods and techniques that produce optimal results, increase efficiency and develop structured processes."

So, what are some ways to plan for the new year, keeping best practices in mind? Here are a few examples. You may have your own process for success.

- Assemble a diverse and imaginative group of people to make up your planning team. Bring together a strong team of leaders and managers who represent every area of the company.
- Allow time for strategic thinking, keeping in mind the "big picture". Include all members of your team and allow time for "big-picture" thinking.
- Get full commitment from key people in your organization. If your team doesn't buy into the planning process and the strategic plan, your chance of success diminishes greatly.
- Encourage open discussions regardless of each person's position within the team. Encourage active participation by everyone involved. Assign strategic tasks.
- How will the plan be carried out? Think about how the plan will be completed. It doesn't matter how good the plan is if it isn't executed.
- Take action with your planning. Make sure everyone on your team understands the plan and their role in it. Actions work best when everyone takes ownership in the process and plan.
- Allow flexibility in your strategic planning. Good strategic plans are ever changing. Changes in the marketplace are constant. Your competition changes all the time. The market changes all the time. Don't be afraid of change.
- Make sure each step in the planning process is clearly understood by everyone involved.

Enjoy and learn from the process. Creating a plan is part of implementing "best practices" in your organization. Make 2023 the best year yet! ■



HAKIMHAN/Stock/Getty Images Plus

"So, what are some ways to plan for the new year, keeping best practices in mind?"





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How Best to Partner with Your Community Manager

By: Stephanie Munn, CMCA, AMS, PCAM
Access Management Group



A community manager works closely with Board and Committee members to provide professional community management services to help your community association run smoothly. Community managers provide a wide variety of expertise and services related to financial management, governance, administration, homeowner inquiries, maintenance, and more.

Having a successful partnership between the community owners, Board and the community association manager is critical to ensuring that living in your community is a pleasant experience. Here are a few tips for success.

Establish Clear Goals and Priorities

Success begins with having a clear understanding of the management contract and the services to be provided. However, each community has different needs and priorities. For example, some communities prioritize enforcing covenants, while others may focus on capital reserve upgrades. Therefore, it is critical to have a mutual understanding of the goals and priorities of your community.

Respect Each Other's Time

Unless you have a full-time community manager on-site, it is likely that your community manager supports a portfolio consisting of multiple properties. Each day, they work to help communities manage their reserves, budgets, and financial statements. Also, they help associations and homeowners respond to emergencies and coordinate planning for community projects. In addition, they attend community meetings, sometimes in the evenings and even on weekends. For

the partnership to be successful, it is important to recognize that your community manager is busy, just like you.

Set Clear Expectations

Both parties should establish a clear set of expectations. Sometimes, an in-person meeting is required. However, email may be acceptable in other situations. This will help both parties clearly understand the priorities for your community.

Consider establishing a regular schedule for things like meetings, maintenance, planning, etc. This will allow both parties to budget their time and manage their schedules accordingly.

Establish Communication Preferences and Guidelines

As with any relationship, personal or professional, effective communication is key. However, there is no specific set of rules that work for every relationship. So, it is important for you to discuss your preference and priorities for how you'll communicate.

- Consider identifying one or two board members to serve as the liaison with your community manager. This will help limit the number of calls and/or emails the manager may receive on any particular topic.
- Clearly establish when in-person meetings are necessary and when communications can be handled via video chat, phone, or email.
- Rather than reaching out to your community manager multiple times per week, consider setting up a weekly touch-point to discuss action items. For example, make a list of items to discuss, things that need follow-up, important upcoming events, etc.
- On Monday morning, managers are often occupied with responding to issues that occurred during the weekend. Consider avoiding contacting your community manager on Mondays unless the matter needs immediate attention.

"Clearly establish when in-person meetings are necessary..."

Last but not least it is important for the entire Board to be on the same page as to what a successful relationship looks like between themselves and the management company. Management companies welcome these conversations to avoid ambiguity so that the partnership can be a successful in order benefit the home values and overall community's stability. ■

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Preparing for Difficult Communications: Helpful Strategies for On-site Managers and Boards in Community Associations

By: G. Lanier Coulter, Jr., Esq. and Brianne Wingate, Esq.
Coulter & Sierra, LLC

Dealing with unhappy or disgruntled residents has always been an inevitable part of being a community manager or director on an association board. Whether a confrontation occurs during an association meeting or at an on-site management office, homeowners often feel the need to vent their frustrations, whether reasonable or unreasonable, at individuals unable to independently offer a solution. In the past few years, it seems these confrontations have become both more frequent and severe. This is not unique to Georgia. It is a concern that is being discussed throughout the Community Associations Institute (CAI), both nationally and internationally.

Our industry has received a multitude of requests from association clients wondering how to prepare for, and respond to, these challenging situations. Depending on the circumstances, sometimes we advise clients to pursue judicial proceedings, like obtaining temporary or permanent restraining orders for managers and directors. We have also delivered numerous cease and desist letters to owners in response to out-of-line conduct by residents towards association leaders and vendors. Because of the current climate and conduct of some residents, many communities are now taking a more detailed approach to document incidents and prevent on-site staff from having to tolerate harassing interactions with disgruntled residents. As boards and managers prepare for informal, annual, special or open board meetings with residents, they need helpful strategies to address discord that may occur.

Below are some tips that may prevent or de-escalate negative interactions with hostile homeowners:

- Analyze the location of on-site staff and consider changes such as installing new doors and cameras.
- Consider requiring pre-set appointments to visit with a manager and/or the board.
- Research whether the association or manager's insurer or insurance broker has active shooter drill courses, whether in a group setting or a private course for your particular property.
- Establish or revisit emergency preparedness plans and safety procedures.
- Attend classes on managing conflict and creating safety plans.
- Consider which meetings, hearings, and other gatherings the community can occur virtually versus in person.
- Plan to have an off-duty officer at all in-person meetings, whether annual, special or open board meetings (executive session or general), if there is any reason to believe a disgruntled individual will be in attendance, or simply as a policy going forward.
- Evaluate if the community wants to permit any properly trained staff to carry firearms on site. Such a decision would need to involve the association's insurance provider and counsel, as well as some level of gun safety and training. Note that this may not be feasible with some insurers.



- Review, with counsel, the protocols to implement a rule and post appropriate signage to restrict firearms in certain areas of the common areas, mainly areas where it would not be necessary to have firearms, even for transporting firearms to and from a Unit.
- Make sure the individual(s) chairing or leading a meeting can remain calm. Not every director is an ideal choice to interact, field questions and provide answers to residents. Emotions can run high, potentially making a challenging situation more heated. Remaining calm and objective can help de-escalate.
- Attend a board training with your management company and/or counsel.
- Avoid one-on-one meetings and interactions whenever possible. Always have a second person/witness present.

“Avoid one-on-one meetings and interactions whenever possible. Always have a second person/witness present.”

Call 911 immediately if an interaction with a homeowner or resident involves weapons or is in any way a threat to individual or community safety. If the interaction is less severe, document the encounter. Keep a record of any hostile interactions so that they are available should the association require the assistance of counsel.

It may seem surprising that community associations and manage-

ment companies have to contemplate these things, but it is the reality increasing numbers of communities are facing. At the most recent CAI Law Seminar in January of 2023 in New Orleans, Louisiana, a five-person lawyer panel representing firms from coast to coast had two attorneys admit that multiple individuals in their office now carry firearms and/or have access to them in the office. Recent tragedies have left directors and managers with no choice but to make preparing for these types of events a top priority.

The key is to not ignore abusive behavior or communications from residents. Moreover, do not turn a blind eye and assume that your community is immune from this risk. Rather, come up with a plan and train staff and leadership. In the event of an incident, document the behavior immediately, and if necessary, seek advice from counsel. With preparation, support, and a calm approach, managers and directors can help promote a safe community. ■



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Inflation and Reserves: The Implications on Capital Planning

By: Nick Brenneman
Reserve Advisors

Inflation has moved into our lives and isn't estimated to move out for a while. While some industries are already seeing some relief, this is not and will not be the case for many other industries for the foreseeable future, including those that community associations rely on for capital projects.

Because the primary purpose of reserve studies is to provide associations with a comprehensive short and long-term capital plan, professional reserve study providers work diligently to account for these economic changes in their studies and reports. Generally taking 3% inflation into account in reports, specialists are now incorporating higher rates in the near term when applicable. There are three primary ways in which inflation is affecting capital planning efforts within associations, including the cost of goods, the cost of materials, and the cost of labor.

So, what are the implications of the current economic environment on capital planning for associations? First and foremost, the current climate has lent itself to capital planning issues within community associations. Because of this financial turbulence, an association's existing reserve fund or reserve funding plan may be prematurely outdated and in need of updates. This is especially true in cases where there are projects due soon or projects already in progress that are capital-intensive.

Your reserve study consultant should take into account the fact that the market will eventually correct itself, as it historically has. When it comes to short-term adjustments, particularly current-year expenditures, it's important to bring in an expert on each project to guide you through the scope of the projects, the need for the project, and related costs.

Currently, expert reserve study specialists will typically increase near-term project costs extending through 2023. To account for supply chain issues, inflation, and pandemic-related pricing, real-world costs are relied upon and collected during information gathering at a community, along with published sources including construction cost



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estimating guides. Because these numbers may vary by market, also relied upon is a proprietary database of recent projects in each market. When these sources of information are weighed, a common finding is that client vendor contracts are priority, followed by the database of recent projects by market and published sources of information.

One important thing to examine during times of economic uncertainty is the prioritization of all upcoming projects. If an association is unable to complete all capital projects as planned, priority should be placed on projects that, if deferred, would cause additional damage to the component, later leading to higher project costs to remediate excess damage. For example, if deferring a roof replacement would increase water infiltration, replacement costs down the road would increase due to continued deterioration of the roof and any other component affected by this water infiltration. Next, associations can weigh the importance of discretionary projects, and decide to defer non-critical projects until inflation subsides or evens out. Again, reserve study consultants will always be available to your board to

CONTINUES ON PAGE 44.

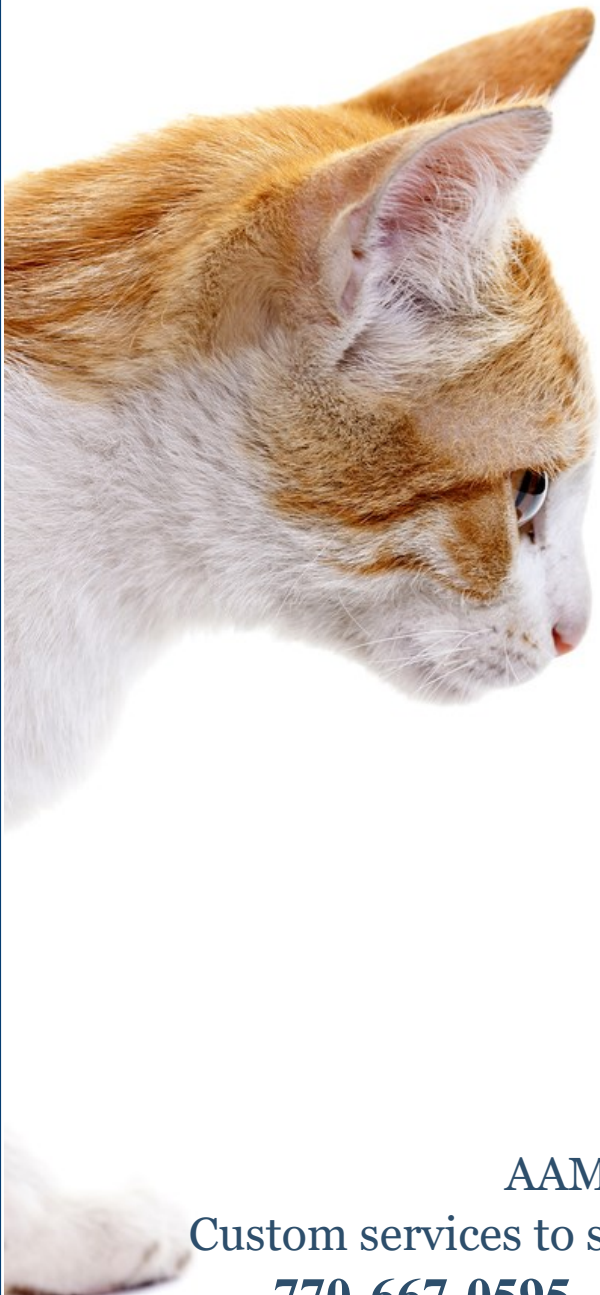
2019	2020	2021	2022
MATERIAL - ASPHALT PAVEMENT (MIXTURES & BLOCKS)			
1.8%	2.7%	8.2%	21.9%
MATERIAL - CONCRETE (READY-MIXED)			
2.7%	2.2%	6.8%	12%
MATERIAL - PLASTIC CONSTRUCTION PRODUCTS			
0.4%	5.4%	35.4%	22.4%
MATERIAL - LUMBER & PLYWOOD			
2.2%	37.2%	18.8%	7.7%
LABOR - CONCRETE CONTRACTOR			
4.7%	0.9%	17.4%	21.1%
LABOR - ROOFING CONTRACTOR			
3.6%	3.2%	9.2%	23.4%

“So, what are the implications of the current economic environment on capital planning for associations?”



Association Management

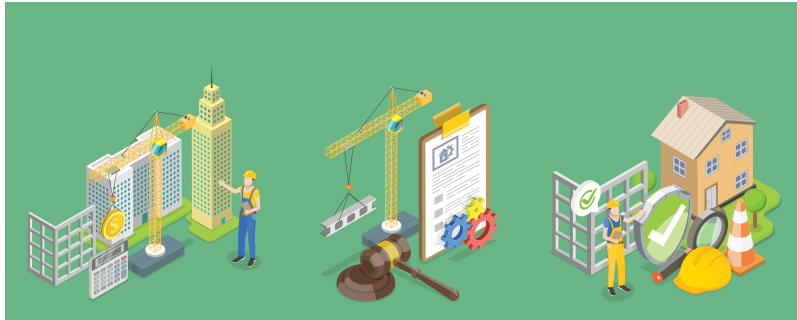
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Understanding Vendor Contracts & How to Make the Most out of Your Relationships with Them

By: Jennifer Carter
Avid Contractors



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One of the many important tasks a board is responsible for is hiring vendors to perform work or provide services to your community association. Whether you're a small or large community, chances are you have at least a few recurring service contracts.

There are a few types of vendor contracts and agreements to keep in mind. There are those recurring service contracts, the ones that provide a service on a regular basis every week or month, etc. Examples of vendors that provide those types of services are your landscaping and/or your pool vendor.

Then there are those contracts with service providers where a board hires that vendor to do a specific job. This could be hiring an engineer to complete a reserve study for your community, or hiring a vendor to complete a project (big or small) they are wanting to complete within the community.

Having a trusted relationship with all your vendors is a crucial piece to the overall success of a thriving board and membership, and that begins with understanding all of your contracts' terms and conditions.

We have outlined some helpful tips and best practice recommendations a board should take into consideration before hiring any vendors and certainly before signing any contracts. If you fail to follow a good due-diligence process, it can cause your relationship with your vendor partners to suffer or even be terminated. It's an extremely expensive and time-consuming process to fire and hire new vendors, so don't rush through the hiring process.

- Most conflict would not even occur between a community association and a service provider if all parties understood the expectations from both sides. Conflict is almost always a direct result of some sort of misunderstanding. Be prepared to have open ended conversations with all your vendors to understand the expectations from both the vendor and from the board/membership. You will be glad you did this from the get-go.
- Boards typically don't read the vendor contracts before they sign them, or they don't read them thoroughly enough and ask the tough questions. This is no fault of anyone. Board members are typically just too busy and don't have enough time to review contracts as they need to be reviewed. Save yourself from a lot of headaches down the road. Spend a few hundred dollars and have your attorney review all your vendor contracts. They know and understand contract language better than anyone, and they know what hard questions to ask about the contracts. There is a good

chance they are also already familiar with your vendor's contracts. This is also just a good business practice, as most board members are not experts at contract language.

- As board members turn over, it's important to understand that those contracts are still in effect, regardless of whether or not a board member who signed the agreement is no longer in their position. A common misconception that boards have is that they do not believe a contract is valid if the board members that signed the contract are no longer on the board. This is not true.

"You need to understand what exactly it is that is included in the price you are paying regarding the service or work you are receiving."

- **UNDERSTAND the FULL Scope of Work!** You need to understand what exactly it is that is included in the price you are paying regarding the service or work you are receiving. A lot of boards do not clearly understand what is and what is not included in their vendor service contracts, which in the end can cause turmoil between the board, membership, and vendor. This never ends well.
- **Understanding the termination clauses** – how can you get out of the contract if things go wrong, or the vendor does not perform pursuant to their contract terms?
- **Got Warranty Issues?** It's important to understand the warranty terms in your contracts, and what specific actions or inactions can void a warranty on any parts or labor. Taking short cuts can void the warranty on the work you are not only having done, but what you are paying for. Working with service providers that have been in business for a respectable amount of time, and that have a good reputation, are good steps towards ensuring work is done so the warranties are not voided. Make sure you check the references for all your vendors.

Keep in mind in that inevitably a mistake will be made by your vendor(s) at some point. Vendors and their employees/staff/contractors don't graduate past human. Don't be so quick to fire them when they do make a mistake. Try to resolve any issues amicably. The grass isn't always greener on the other side. In general, working out challenges with your contractors will make both parties happier, and the relationship is much more fruitful for all involved, including your membership. ■



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(above) Kelley Moon, EPIC., Joe Moon, Ameristar Roofing, Emily Little, Beacon Management Services



(above) Barry Coleman, Pacific Premier Bank, Mike Shaffer, Shaben & Associates, Brandie Bays, Shaben & Associates



(above) Amber Collins, Beacon Management Services, Cari Gaines, Crabapple LandscapExperts, Austin Whitlock, Brown & Brown Insurance, Stephen Finamore, Lueder, Larkin & Hunter, Meghan Keith, Silverleaf Management Group, Kenneth Hair, Access Management Group, JJ Chaves, Planned Companies



(left) Susan Contreras, Blueprint Painting & Renovations, Ian Mari, Homeowner Leader



(left) Lindsey Trost, Homeowner Leader, Judy Dreher, Dreher Insurance



(above) Tracy Henson, Homeowner Management Services, Kenneth Hair, Access Management Group



(left) Allen Burns, Remediation Group, Eric Love, American Homes 4 Rent



(right) Kent Atzinger, Access Management Group



(above) Doug Ward, Homeowner Management Services, Diane Amaral, Homeowner Management Services, Ron Jockers, Homeowner Management Services



(left) Scott Douglas, Homeowner Leader



(left) Bill Gourley, NowackHoward, Dan Moore, NowackHoward, Christina Steinman, FirstService Residential, Stephen Finamore, Lueder, Larkin & Hunter, LLC, Elina Brim, Lueder, Larkin & Hunter, LLC, Judy Dreher, Dreher Insurance, Jamie Trost, Homeowner Leader, Kent Atzinger, Access Management Group



(above) Melissa Rogers, Heritage Property Management Services, Natalie Hunsucker, Homeowner Management Services

(below) Kimberly Munier, American Casual Living, Eric Love, American Homes 4 Rent, Amy Stanitzke, Freeland Painting



(above) Dave Lyons, Access Management Group, Shannon Tillou, Access Management Group, Teddy Russell, Russell Landscape Group



(above) Andrew Hixson, National Cooperative Bank, Michael Dubas, Beacon Management Services



(above) Vicky Sand, NowackHoward, Penelope Hilliard, Crabapple LandscapExperts, Victoria Baggett, NowackHoward



(above) Lisa Turner, Silverleaf Management Group, Jacob Davis, Lazega & Johanson, Bradley Griffin, Lazega & Johanson



(above) Rob Stein, Lazega & Johanson, Julie Jackson, Greenwood Group, Chris Lee Khano, Lazega & Johanson



(above) Michael Coleman, Pacific Premier Bank, Kenetha Ponder, Pacific Western Bank, Barry Coleman, Pacific Premier Bank



(above) Ian Mari, Homeowner Leader, Tracy Henson, Homeowner Management Services



(above) Allen Duckett, Atlanta Landscape Group, Kris Longfellow, Access Management Group, Randy Ray, Atlanta Landscape Group

(below) Rafael Alvarez, P3 Painting & Renovations, Robin Parker, FirstService Residential, Jeff Musselman, FirstService Residential, Jacqueline Cress Mill, FirstService Residential, Megan Owenby, Brown & Brown Insurance



(above) Dylan Steed, Winter Capriola Zenner, Lindsay Benton-Josepher, Community Management Associates, Philip Lahman, Winter Capriola Zenner

More photos on the next page...

2022 ANNUAL MEETING...*Continued from previous page.*



(above) Marc Creamer, Heritage Property Management Services, Melissa Rogers, Heritage Property Management Services, Becki Swain, Heritage Property Management Services



(left) In'spires' Award Winner: Michael Shinnars accepted on behalf of his daughter, Molly Shinnars



(above) Rising Star Award Winner: Andrew Hixson, National Cooperative Bank



(above) Homeowner Leader Excellence Award Winner: Lindsay Trost, Homeowner Leader



(above) Educator of the Year Award Winner: Judy Dreher, Dreher Insurance



(above) Committee Chair of the Year Award Winner: Kris Longfellow, Access Management Group



(above) Doyle P. Jones Leadership Award Winner: Jeff Ellixson, Beacon Management Services



(above) President Award Winner: Miye Johnson Yi, Winter Capriola Zenner



(above) Presentation of the Presidents Gavel: Tina Saadat, CAI-Georgia Executive Director, President Elect, Jennifer Fournier, Homeowner Leader, President, Kelley Moon, EPIC.



(above) Rita Kennedy Award Winner: Kent Atzinger, Access Management Group, Dennis Hoffman with Community Management Associates

(right) Rita Kennedy Awards Winners: Eric Henning, Community Management Associates, Jamie Platt Lyons, Lazega & Johanson, Julie McGhee Howard, NowackHoward, Miye Johnson Yi, Winter Capriola Zenner, Chuck Negas, Northwest Exterminating, Ashlie Gray, EPIC., Teddy Russell, Russell Landscape Group, Kelley Moon, EPIC., Kent Atzinger, Access Management Group, Scott Douglas, Homeowner Leader, Sean Ruthven, Access Management Group, G. Lanier Coulter, Jr., Coulter & Sierra, Dennis Hoffman, Community Management Associates





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Best Practices: Getting Ready for Pool Season

By: Diane Lasek
PTR Control Systems, LLC

A wonderful thing about living in a planned community is the benefit of having a pool. Having a Pool Safety Plan in place with security measures for managing pool-goer safety is an ongoing task. With pool season around the corner, getting your pool area “Access-Ready” for your residents should be a priority. Not waiting until the last moment can ensure that you can get your Access Control Company scheduled to come out to your community to get things checked out, and to make sure that everything is ready for your county’s inspection prior to your opening day.

Fences and Gates

There are rules for securing your pool. These laws and guidelines to operate your pool are set out in the Georgia Department of Public Health Code. It’s important for you to check your local codes, as each county may differ. Georgia Law requires that swimming pools must have a perimeter fence at least 48 inches in height with a locked gate. The gate attached to your swimming pool fence must also be at least 48 inches in height. It must be self-closing and self-latching. The gate door needs a bolting device that is 36 to 48 inches off the floor. If the wall of a building (such as the Clubhouse) serves as one of the walls of the fence, the door leading to the pool needs an alarm that sounds when the door opens. No swimming pool fence may have a gap at the bottom or vertical fence slats that are big enough for a ball that is four inches in diameter to pass through. In addition to these rules, if a fence has both vertical and horizontal slats the slat attachments must be installed on the inward side of the fence.

Pool Gate Access Control Systems: Locks, Fobs, Cards

Access Control Systems control access to an area using keypads, fobs, biometric readers, magnetic locks or “maglocks,” electric strikes, or mobile credentials. Each resident is assigned a credential to operate the swimming pool gate lock without the need for any keys being cut. If a person moves away or security has been compromised on-site, you can change the code or delete the badge of the former resident.

The most popular Access Control option for pool gates is having residents swipe a card or fob to enter. You can use the same card and fob system in all your common areas, including your fitness center. People illegally entering areas such as your pool, with duplicated cards and fobs, are a real problem. Fortunately, there are now cards and fobs that cannot be duplicated. Changing over to these requires you to reestablish the credentials for each of your residents and can help to keep these areas for residents’ use only. You can also use Medico Locks, a brand whose keys cannot be duplicated.

While most systems operate with a keypad or fob reader, some access control systems are operated using mobile credentials. Your



“While most systems operate with a keypad or fob reader, some access control systems are operated using mobile credentials.”

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mobile device is your credential, and it allows the lock to operate based on the proximity of the device instead of having to present it to the reader.

Electronic access control requires power, either by a transformer plugged into an electrical outlet, or batteries. Some access control providers have cellular connectivity, and or network (Wi-Fi and/or network option). And there are mechanical locks that can be used for situations where power and internet connections aren’t available. A magnetic lock paired with card or fob are a good option, as are using wrist bracelets.

Access Control Systems are ever evolving with new technologies that will make setting up credentials easier, and more efficient for both you and your residents.

Your Pool’s CCTV Cameras

Another important component in being ready for the pool season is making sure that your pool cameras are operational, and that you can retrieve the security camera’s footage. Cameras can act as a deterrent to potential criminals and help to alert you to any nefarious activity. And most importantly, retrieving footage allows you to collect evidence in the event of an accident. In addition, having a security camera at your pool gate can alert you to any unauthorized access.

Having your pool “Access Ready,” with your gate’s Access Control System checked to make sure that it’s functioning properly and making sure that your pool’s cameras are operational will help to put your mind at ease as you prepare for an active pool season for your residents. ■

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Best Practices for Spring Pool Opening

By: Craig Sears

Sears Pool Management Consultants

Spring pool opening is an exciting time for the whole community. The weather is warming up, school is winding down, and families are looking forward to spending time at the community swimming pool. A lot has to happen in order for your pool to open successfully. While your pool service provider should handle most of the work, there are some simple tasks you need to handle.

Follow these five best practices to help ensure your Spring pool opening is as stress free as possible:

1. Confirm who is filing your pool operating permit with the county, if applicable. Perhaps the most common oversight is to forget to file your permit paperwork or assume someone else is handling it. Not every county requires an annual pool operating permit. However, most counties around Atlanta and other metro areas in Georgia do. The permit paperwork process can be confusing if you're handling it for the first time, and the process varies depending upon the county. Talk with your pool service company and property manager to confirm who is receiving the paperwork from the county and who will file the paperwork and fee. Some pool companies will file on your behalf, while others will not.
2. Confirm the opening date with your pool service company and board members before announcing it to the community. This may seem a given, since this date should be in your pool service contract. However, it's possible the pool company found a problem when they went to start opening preparations, or that a board member is researching potential facility upgrades or program changes that might necessitate a change in the pool opening date.
3. Coordinate any projects in or around the pool area with your pool service company. Be aware that county inspections include areas such as the pool restrooms, fence, gate, and telephone, in addition to the pool equipment and pool area itself. If anything is not in safe operating order per code, you may be denied your operating permit. Even routine cleaning and maintenance tasks, such as pressure washing and painting, should be coordinated with your pool service company, as these projects cause dirt, debris, and overspray to wind up in the pool, making it dirty and altering the pool chemistry. Even projects you wouldn't think would be related to the pool can cause a problem. Tree removal adjacent to the pool may result in branches and tree debris in the pool area; clubhouses receiving a



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"The weather is warming up, school is winding down, and families are looking forward to spending time at the community swimming pool."

- new roof may result in nails and shingle debris falling into the pool area, causing a pool to fail inspection.
4. Make sure all utilities and services are turned on and operating correctly. A landline phone must be working in order for the pool to pass inspection. The phone company usually needs a few weeks advance notice to ensure it gets turned on. Don't forget to reactivate or increase your trash service pick-up schedule, if needed.
 5. If your pool is staffed with lifeguards or attendants, help your pool company recruit Summer staff. This can be done with minimal effort. Staffing has been extremely challenging for the pool industry, and many others for that matter. However, your contacts are local and in the community. You may know good candidates for these positions, which will help you and your pool company. Mention in your community newsletter what positions the pool company is hiring for and how to apply. Share their social media posts on your community social media.
- If you follow these five best practices, you'll give your community and pool company the best chance of opening on time without a problem. Thanks in advance for your help! Happy swimming! ■



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How to Stick to Your Budget

And other tips for effective community association financial planning.

By: Neal Bach, CPA
BJM Duluth

Let's face it. Budgeting and budget management can be one of the most tedious tasks for property managers and association board members. Most covenants require some sort of a budget and budget disclosure, but there is a vast difference between a hastily assembled and ignored budget as opposed to a well-planned and regularly reviewed budget.

Budgets require attention and maintenance every month, but a well-documented and well-maintained budget can be one of your association's most important management tools – now and for future boards as well. Whether you're a property manager or association board member, here are some ideas to help you effectively and efficiently manage association budgets and finances.

Best Practices for Budget Management

Now that you (hopefully) have a budget in place, it's important to keep it current, reviewing actual expenses vs. budget on a monthly basis. Here are a few tips to help you manage your budget over the course of the year:

- **Report budget status each month.** With the help of the property manager, the board treasurer should review expenses vs. budget each month and report major variances or trends.
- **Utilize preventative maintenance.** Delaying repairs can be expensive. Use a proactive maintenance strategy to extend the life of major assets, minimize down-time, and reduce overall maintenance costs.
- **Don't bury unbudgeted expenses.** Don't put the unexpected pool pump replacement in the social budget because there's extra money. Put expenses in the right category and document the reason for the variance.
- **Fund the reserve account.** Your reserve study, which should be updated every 3-5 years, outlines major repair and replacement projects that will be required in the future. This money is already allocated, and must be available when needed.
- **Review contracted vendor expenses.** If you notice an increase in fees or surcharges, contact the vendor. It may be time to renegotiate, or find a new vendor. Prioritize and focus on the larger contracts and larger variances, like landscaping, pool, and building maintenance.
- **Keep a close eye on revenue.** Stick to your policies and quickly begin collection efforts when residents fail to pay dues. This sets the tone that the community takes this process seriously, and will encourage everyone to pay on-time.

Best Practices for Sound Financial Management

Pretty much every community association starts out financially sound. The common areas, amenities and building are shiny and new, and the developer maintains everything. Then the developer turns over the community to the residents, time passes, and the community starts to age. The real challenge is to maintain that financial health consistently over time. Here are my top tips to ensure that your community association is financially successful today, and into the future:



Channarong Prasertthai/Stock/Getty Images Plus

“Now that you (hopefully) have a budget in place, it's important to keep it current, reviewing actual expenses vs. budget on a monthly basis.”

- **Have a strong board and property manager.** Remember that your community is a business. The board of directors and property management are the business leadership team. At least one board member, hopefully the treasurer, should have some financial experience.
- **Know and enforce the rules.** Before you can enforce the rules, you need to know what they are. Read your community association covenants, bylaws, and other documents in detail. Then enforce the rules the same for everyone.
- **File tax returns.** After years of talking about this, I still get calls almost every month from board members asking if community associations need to file tax returns. Yes, you do – both federal and state returns for associations located in Georgia.
- **Maintain adequate insurance coverage.** This includes general liability, directors & officers (D&O), fidelity, and cyber. The best time to confirm adequate coverage is now, not after there's a major issue or theft, and the association (and board) gets sued.
- **Audit the financials every 2-3 years.** Many covenants require annual, or at least regular, audits or other financial reviews. These financial procedures verify the association's financial health, identify risks, and minimize the chances of major mistakes, theft, and fraud. More often than not, it proves that the board and property management company utilize sound financial procedures.

Seek Professional Help

No, not that kind, although you may wonder sometimes why you became a board member or property manager. If your community is not currently professionally managed, have a property management company give you a presentation so you know what's available. Don't be afraid to ask for help from other professionals and subject matter experts with community association experience, like CPAs, lawyers, reserve engineers, and insurance brokers. That's a sign of a great leader! ■



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Best Practices Regarding Your Roof

By: Kevin Tolnai
Colony Roofing

If you are responsible for a condominium association or multifamily building, it's important to remember that improper maintenance, traffic wear or severe weather can cause damage to your roof. To ensure the safety of your property and residents, it's essential to follow best practices regarding your roof.

Regular roof maintenance is essential for the life and performance of your roof. It also helps prevent costly repairs and extends the life of your roof. Here are some best practices when it comes to maintaining your roof:

1. Inspect your roof twice a year – once in spring and again in fall – for signs of wear, damage, or debris buildup.
2. Clean scuppers, gutters and downspouts regularly to ensure water is being properly diverted away from your roofline.
3. Remove any debris, such as leaves or twigs, that may be stuck in the seams of thermoplastic olefin (“TPO”) roofs. TPO roofs can become damaged from the accumulation of leaves and other materials.
4. Trim back any tree branches that may be near your roof, as they can cause damage when brushing up against it.
5. Check for signs of moisture or mold inside your building periodically to ensure there are no leaks coming in from the roof. Look for water stains on the ceiling or walls.
6. If you frequently have equipment being repaired on your roof, you may want to consider putting walk pads on heavy traffic areas of flat roofs.

Following these best practices will help your roof remain in good condition for many years to come. Remember, regular maintenance is key for avoiding major repairs or replacements down the road. Invest in a quality inspection and cleaning service at least twice a year to ensure your roof is properly cared for.

Of course, Mother Nature can overcome even the best maintenance program and damage your roof anyway. It is a good idea to have a list of trusted contractors that are equipped to respond to routine repairs



and emergency situations with temporary remedies and tarps. If you suspect storms did damage your roof, get an assessment from an experienced contractor who specializes in multifamily roofs. They can provide a detailed report that outlines affected areas as well as recommendations for repairs and preventive measures.

It may just be time to consider a new roof before problems occur. When shopping for a condominium or multifamily new roof, there are several best practices to consider. First, you should always check with your

condo association or building management company to determine the exact type of roofing material approved for installation on your property. Additionally, it's important to research local and regional building codes that may affect the materials and installation process. A good roofing contractor can help you with this process.

Second, ensure that any contractor you hire is licensed, bonded, insured and experienced in condominium and multifamily roofing projects. Ask for references from previous multifamily and commercial clients, read reviews online and get multiple bids for your project before making a selection.

Third, review estimates carefully; make sure all labor costs and materials are itemized so you understand exactly what you're paying for.

Finally, ask the contractor if they offer a warranty on their work and materials. A quality contractor should be willing to stand behind their installation with a strong warranty that covers both labor and material costs.

By following these best practices when maintaining and shopping for condominium or multifamily roofing, you can enjoy many years of great performance from your existing roof and ensure a new roof is installed correctly and provide lasting protection for your property. ■

“...ensure that any contractor you hire is licensed, bonded, insured and experienced in condominium and multifamily roofing projects.”



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Best Practices: Proactively Recording Notices of Liens

By Christine L. Khano, Esq.
Lazega & Johanson LLC

As responsible drivers of Georgia, we all—hopefully—carry car insurance. As responsible homeowners, we all carry homeowner's insurance. As responsible adults, we all carry health insurance. See a pattern? We responsible people like to reduce financial uncertainty and ensure a layer of protection. Taking precautions on the front end makes treatment and remediation on the back end less expensive and more manageable.

Generally, the best practice is to be proactive rather than be reactive. So why should it be any different when it comes to safeguarding a community association's interest in collecting debt? It should not be. In the same way a responsible association would take out insurance policies to protect its property, officers, and directors, it should take precautions to protect its interest in securing its collection of debt against delinquent owners. But how?

When a community is a common law association, the best practice is to record a lien against the real property in the local county land records. Likewise, when a community is subject to either the Georgia Condominium Act ("GCA") or the Georgia Property Owners Association Act ("POAA"), the best practice is to record a paper document referred to as a "notice of lien" against the real property in the local county land records.

Under the GCA and POAA, there is no legal requirement to record a lien to ensure the money owed to an association is secured against the property; both statutes provide for an automatic statutory lien with the mere recording of a declaration for an association subject to the respective statute. The statutory lien has the same legal effect as a recorded lien. Both are an encumbrance on the property that require the owner to pay the debt owed to the association at or prior to a closing.

For the above reasons, too often boards of a condominium or property owners association believe there is no reason to record a notice of lien when there is a statutory lien. Again, the best practice is to be proactive rather than reactive. While those statutes and declarations may provide for an automatic lien, the best practice is still to record a notice of lien in the land records. The association's lien then becomes public record. When interested parties search the land records for the subject property, recorded notices of liens announce to all interested parties that the association has a lien against the subject property. By investing a small amount of time and money to record a notice of lien, associations maximize their likelihood of recovery at closing and minimize the hassle of delay and additional expenses.

The goal is to maximize the association's ability to collect. Therefore, the association should want to make it as easy as possible for interested parties to locate and identify the association's debt and



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"...too often boards of a condominium or property owners association believe there is no reason to record a notice of lien when there is a statutory lien."

pay it off at the closing table. Ideally closing firms should look to see if an association is subject to the GCA or POAA, which should trigger a request for a closing payoff statement even in the absence of a recorded lien recorded, but that doesn't mean this always happens.

If there is a closing and a closing payoff statement has not been requested, then the new owner, as well as the prior owner of the property subject to the GCA or POAA, is liable for the unpaid amounts because there is a statutory lien. Nevertheless, having a statutory lien alone does not magically summon the amounts owed; it merely preserves the association's right to collect it. The association still needs to pursue the parties for the debt. Accordingly, proactively recording a notice of lien is more cost effective and time efficient than reactively chasing down a current or prior owner after a closing when the debt is not paid.

The idea is not to rely solely on the automatic statutory lien, but rather to treat it as a safeguard like insurance. We don't rely on car insurance to save us from paying for big accidents. We still take precautions while driving to avoid situations where we need to depend on our insurance policy. Next time the association is debating whether or not to spend a little extra to record a notice of lien, remember the best practice is to be proactive rather than reactive. ■

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Fraud Protection Checklist for Community Associations and Managers

By: Carolyn Moscoso
Alliance Association Bank



✓ 1. Identify High-risk Users

Identify your high-risk users such as HR, executives, IT managers, accounts and financial personnel

- Review each for what is posted on social media, company websites and in the public domain, especially job duties/descriptions, hierarchical information, and out of office details
- Identify email addresses that may be searchable in the public domain

✓ 2. Implement Technical Controls

Implement appropriate technical controls for your technology

- Email filtering
- Two-factor authentication
- Complex passwords
- Patching/updating of all IT and security systems
- Manage your network boundaries
- Manage access and permission levels
- Adopt whitelists or blacklists for external traffic
- Register as many as possible company domains that are slightly different than the actual company domain

✓ 3. Develop Critical Policies

Develop critical policies and review with stakeholders

- Develop a wire transfer policy that documents your established processes and corresponds with the products and services we provide. Review it with all parties involved periodically.
- Institute policy concerning access to and release of financial information, IP, customer records and employee records
- Institute a security policy

✓ 4. Develop Response Plan

Develop a comprehensive cyber incident response plan

- Consider comprehensive cyber security insurance that covers data breaches and CEO fraud
- Understand what information you need to protect: identify the corporate “crown jewels”
- Understand how to securely store the information, who has access to it and how to protect it

✓ 5. Perform Regular Training

Perform security training regularly to keep it top of mind

- Train users on the basics of cyber and email security
- Train users on how to identify and deal with phishing attacks with new-school security awareness training
- Frequently phish your users to keep awareness up

✓ 6. Identify Red Flags

- Watch out for fraudulent or phishing emails bearing the following red flags such as urgency, spoofed email addresses, demands for wire transfers

“Consider comprehensive cyber security insurance that covers data breaches and CEO fraud...”



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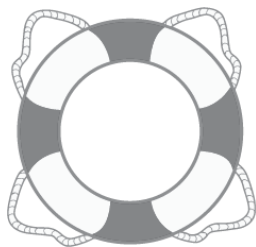
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Stop the Madness!

Proven Ways to Resolve Conflict in Your Community

By: Lisa Simmons
Beacon Management Services

It's a fact of association life: owners will get mad and complain at some point. But the process doesn't have to get ugly. You can create a process for handling complaints so that none fall through the cracks and owners feel like their concerns are heard.

A dispute resolution process is critical for associations. Remember, the community association members are the owners, and the corporation needs to respond to the needs of the owner members. No association will be able to resolve every complaint every time, but establishing a procedure and then adhering to it demonstrates that the association, and its board of directors, addresses the needs and concerns of the members in a consistent way.

1. Respond to Issues in a Timely Manner.

If you're not good at getting back to homeowners via email, social media, or direct mail, misunderstandings are bound to occur. Get in the habit of responding appropriately and in a timely manner to homeowners' questions and concerns.

Set up notifications on social media if someone messages or comments on your community's Facebook Page or mentions your community on Twitter. You can also set up Google Alerts to email you if certain keywords are used in news articles. Designate this task to the board secretary, who can respond with (at least) a templated answer and contact information.

You can also automatically forward any generic email inquiries to the board president. This helps speed up communication by getting the message directly to the top of their inbox.

2. Empower Your Management Company.

If you have a property manager, have all comments or questions run through the management office. That way, they can be organized for the board in their board packets prior to the meeting and addressed in a more efficient way. The key is ensuring your manager is knowledgeable, capable, and empowered to answer basic complaints. Some associations will empower their manager to take certain actions. The manager can take the complaint at face value if owners have written it down, or you can request there be a specific process—like a drive by the property—to verify the complaint.

If complaints can't be easily verified, the property manager can still receive them and explain the process to owners. The manager can say, "Thank you very much. This will go into the board packet, and the board will consider it. A response will be provided after the next board meeting." That way, owners will have an idea of when they'll receive a response. If it doesn't empower the manager, the board will be blamed for the lack of the management company's response.

3. Know When a Complaint Requires Board Action.

If the manager can't resolve an issue, the complaint should be addressed as an item on the agenda at a board meeting within a certain amount of time, whether that's 30, 60, or 90 days or shorter depending



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“Get in the habit of responding appropriately and in a timely manner to homeowners’ questions and concerns.”

on the nature of the complaint. In the meantime, the manager should talk to the complainant. If it's about a vendor or another owner, also talk to those people to verify the information. Then the issue should be addressed by the board or committee, and the complainant should have the opportunity to come as well. The person handling the complaint can explain the issue, what's been done to process it, and make a recommendation to the board.

4. Ensure Board Members Participate – Not Vegetate.

Complacent and inactive board members can lead to poor communication with residents, unsolved disputes between neighbors, missed meetings, lingering open items and mismanaged financial statements. The solution: hold meetings exactly according to your community's bylaws, and create an atmosphere of accountability within the organization. Elect a president who leads by example, makes decisions and encourages teamwork.

5. Don't Show Favoritism Among or Between Residents.

Inconsistent application of the rules between homeowners can cause a lot of problems between residents and board members. If one person can keep three dogs in their condominium while another gets fined for having one, your board has an issue with favoritism. The solution: ensure that each board member reads and understands the community's recorded covenants, including community guidelines and appropriate consequential measures. If you spot favoritism as the board president or vice president, talk to the board member and explain that bias doesn't contribute to a harmonious neighborhood. ■

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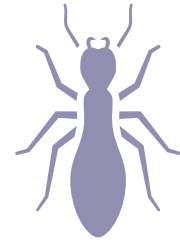
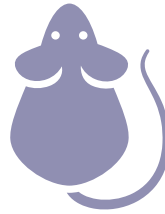
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Proactive or Reactive — Protecting Your Investment

By: Chuck Negas
Northwest Exterminating



Whether it be your health, car maintenance or home maintenance, planning and being proactive rather than reactive can lead to easier management, usually less expense, and ultimately less stress!

Building a new structure? Some feel they will save the money from not performing a termite treatment and worry about it if and when they show up. If you are building a new structure or acquiring an existing one, hiring a neutral third party to do an inspection can be a wise investment. By finding things that may be missed on a cursory walk around can often save money on things that may show up later.

First order of business: termites. Termites are active year-round but to many “out of sight out of mind.” The problem with termites is by the time the first sign is found, it is the areas behind the walls where damage has been taking place. Even in a commercial building constructed of concrete and steel anything with any cellulose product such as pictures, sheetrock, important files, and flooring can be damaged. Having a reputable qualified termite control company perform a liquid treatment or install a baiting system can save headaches later. Typically, there are two types of coverage. Retreatment coverage involves the company retreating the areas of concern when termites are found to be active on a structure that has had a termite program instituted. This type of coverage does not provide any coverage for damage caused by termites. An agreement that includes retreat and repair coverage means that in addition to any retreatment there is some provision for the repair of damages caused by termites. As every company’s agreement is different, you need to have an understanding of what the agreement covers. As a rule, no agreement will cover everything but will cover major structural damage to a structure caused by termites. Conducive conditions, changes in the environment, or the inability to perform a proper annual inspection can affect an agreement and what may or may not be covered.

Termites are not the only thing that can destroy wood and affect the integrity of a structure. Sometimes found in crawl spaces and sometimes in attics, wood infesting beetles generally do not cause damage as quickly as termites but they can affect the building over time. Moisture and wood destroying fungus are another concern that may will compromise a structure. Some will ignore these conditions thinking it will take care of itself or they will address it later. But what can be a simple fix now can be a costly repair later.

Another issue with a structure is the intrusion of wildlife. This often takes place when wildlife is looking for food, shelter or a place to breed. An inspection of a structure to find any vulnerabilities can avert many potential problems. Some vulnerabilities occur when openings are made for utility wires and others may be there from openings used for ventilation or in some cases short cuts taken in construction. An opening as small as a dime can allow a mouse to enter and an opening the size of a quarter will allow a rat to enter. Any opening can be gnawed on and enlarged for larger pest and animals such as squirrels, racoons, possums and others. Because rodent teeth are constantly growing they are constantly gnawing to keep their teeth ground down. This trait will often times cause them to chew on electrical wiring as well as mechanical equipment, which could cause a fire.

Vents that do not have screens can also be open invitation to bats and pigeons. Besides the physical damage of materials, the excrement from these intruders can cause respiratory problems and other health issues. Another problem area can be the edge of a roof. Whether it be by design for venting or by shortcuts in construction this area may have a sizeable gap sometimes known as builders’ gap.

Metal screens over vents and sheet metal used to seal openings around utility penetrations or areas at the edge of a roof will go a long way towards reducing the chances of wildlife issues. One other area that can help is to utilize your landscaper and tree company business partner to keep shrubbery and trees trimmed back from the structure. This will reduce the opportunities for wildlife and other pest to have a direct route into the structure.

These proactive practices will go a long way to reducing headaches as well as keeping money in your pocket for other more desirable projects. ■

Besides the physical damage of materials, the excrement from these intruders can cause respiratory problems and other health issues.


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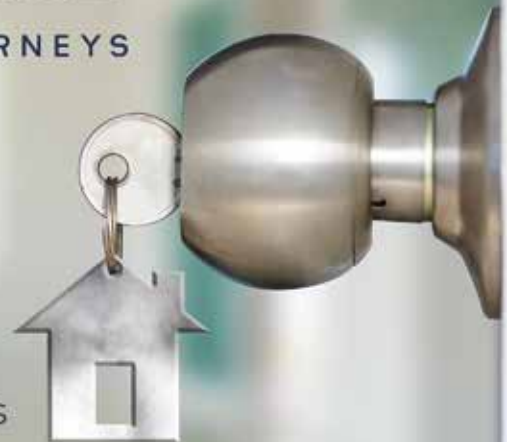
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Writing-Off Delinquent Assessments as Bad Debt Cleaning out Receivables for the Year Ahead

By: Michael Rome, Esq.
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It's a sad truth that some delinquent assessments can be very difficult to collect. This presents several important questions, such as: Does an association have to indefinitely leave delinquent assessments on the financial records? If unpaid assessments are written-off does the association get to keep the funds if they are subsequently collected?

Although some businesses write-off bad debt for tax benefits, this is not the case for associations since a community association does not usually owe any income taxes. Instead, an association writes-off bad debt to more clearly reflect its financial situation. Delinquent assessments can be considered a type of accounts receivable. Therefore, if it is likely the debt will never be recovered, the old assessments should be removed from the books.

So how is "bad debt" defined within the context of a community association? There are actually two categories:

Uncollectible Accounts. An account is uncollectible when it is not legally possible to recover the funds. For example, if the assessments have been discharged in a Chapter 7 bankruptcy, and the property has been foreclosed, the account is considered legally uncollectible.

Another example is assessments that are older than the four-year statute of limitations. The four years is measured from the first day the assessments were late. If assessments are due on January 1st, then they are late on January 2nd. If suit has not been filed within four years, the association loses its claim (including any lien) and the account will be regarded as uncollectible.

Unlikely To Collect. If it is doubtful the assessments will ever be recovered, they may be written off as bad debt. A common scenario is where the association has obtained a judgment, and it cannot be satisfied through garnishment or attachable assets. Although there is no way to presently collect on the judgment, it might be possible to do so at a later date.

One more example is when the debtor cannot be located for service of suit, which means the four-year statute of limitations continues to run on the delinquent assessments. This is a situation where a debt could be considered unlikely to be collected. When an assessment is unlikely to be collected, as opposed to uncollectible, writing off the bad debt does not preclude the association from retaining any funds that are later recovered.

An important caveat to keep in mind is that writing-off bad debt is ultimately an accounting procedure, and should be done with the advice of a CPA. The accountant can consult regarding generally accepted accounting standards, in addition to any relevant IRS regulations. ■

"...some businesses write-off bad debt for tax benefits, this is not the case for associations since a community association does not usually owe any income taxes."



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New Board? Listen Up!

By: Griffin M. Bell Esq.
Winter Capriola Zenner, LLC

Phew! Now that Board Election season is over, we can take a deep breath, but it is not time to rest just yet. By the time you read this, the dust will likely have settled. Hopefully, you will be well into implementing the below Best Practices regarding moving forward with your general counsel.

Assuming the Board had little or no turnover, there isn't much to be done, as you likely are familiar with the attorney as well as the attorney's role with regards to your community association. However, if you experienced a large amount of turnover or a complete flip of the Board, some introductions are in order. Thanks to the emergence of Video Conferencing, these introductions have never been easier. A simple Video Conference will allow the Board to become familiar with the general counsel as well as allow the following discussions that are necessary to ensure a smooth transition into the new year.

It continues to surprise me when I attend an association meeting, upon being introduced, I get a lot of confused eyes from the crowd. This is followed by owners coming up to me and telling me they had no idea the association had general counsel and what our role was. A similar confusion may exist when new owners cycle onto the Board, and that is why step one is to make sure the new Board is familiar with the attorney and their role as well as what expectations are and what concerns exist.

It is a common trend that the new Board will have run on a platform that includes changing the Association's Governing Documents or changes in the strategy the Board uses in legal actions. It is crucial the Board understand the Governing Documents as well as any impending issues with the Documents. This discussion should include whether the Documents are set to expire anytime soon and any Amendments that either the Board wishes to draft or the general counsel suggests are in the best interest of the association. The most common of these include the association subjecting itself to the Georgia Condominium Act or the Georgia Property Owners Association Act and a Leasing Amendment to curtail corporations buying up lots within an association.

Similarly, the new Board may have run with the intention of changing the Design Standards of the association. As general counsel,

attorneys work closely with associations who wish to restructure their Design Standards to make them more stringent or more lax. Assuming that was a platform for the new Board, it is important to lay out the process for amending and implementing new Standards as well as what process the Board would like the general counsel to pursue for violations. If this is the case, the new Board should also discuss scheduling an association meeting to present the new Standards as well as a strategy for making the new Standards more palatable for all owners.



“A simple Video Conference will allow the Board to become familiar with the general counsel as well as allow the following discussions that are necessary to ensure a smooth transition into the new year.”

as the association being named as a defendant in a matter. This discussion needs to delve into how the general counsel's firm handles active matters from a strategic point, and whether the new Board wishes to deviate from that strategy. My suggestion is to use this time to obtain a status report on all accounts “in legal”, what the next step(s) are, and what kind of timeline the association can expect.

Finally, this Virtual Conference, other than creating an initial sense of familiarity, will also serve to set up a point of contact. It is crucial to understand the relationships between the Board and general counsel, as well as the role the property manager may play and who all would like to directly be in the loop. Some Boards wish to be more hands on and some prefer a hands off approach, so making sure everyone is on the same page is important.

Implementing these Better Practices is the key to getting a new Board off and running, as well as ensuring there is a known plan that limits the association's liability and keeps the association's best interests in the forefront. ■

The Board needs to make sure to bring up and discuss the contractual agreement between the Association and General Counsel. Most firms in the community association industry have both a “Retainer” and “Non-Retainer” option, and the Board may be unfamiliar with which is more beneficial for their association. Most Firms have an “elevator pitch” and can quickly go through the benefits of each with regard to this specific association.

It is important that the new Board be made aware of active accounts the general counsel is handling for them. This will overwhelmingly include collection matters, but may also include covenant violation matters as well



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INFLATION AND RESERVES...from page 14.

help inform and solidify the updated trajectory of capital project timelines.

Of course, periods of inflation require associations to re-evaluate their current funding plans, specifically near-term. With the guidance of a reserve study consultant, two questions associations will work through are:

1. If we are facing significant increases in contributions, can the increases be phased in over a number of years?
2. Could a loan scenario be used to minimize reserve contributions near-term?

These questions allow associations to consider not only their current and future financial situation, but to consider the financial situation of their residents. While it's important for boards to consider how inflation is affecting their community as a whole, it's also important to consider the financial status of those who make the community what it is.

If an association is running low on funds and project timelines are being disrupted, it's inevitable that residents may be individually suffering financially as well. If you can expand the number of phases of increased reserve contributions, residents will not experience as dramatic a financial burden. Additionally, minimizing contributions near-term through a loan can help associations complete crucial projects on time, while also giving residents time to recoup from any financial strain they are experiencing before having to comply with higher dues.

Making these decisions on your own can be stressful, but reserve study professionals are here to help you navigate the unknown with expert experience and advice. ■



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(above) Jennifer Fournier, Homeowner Leader, Kelley Moon, EPIC



(above) Megan Owenby, Brown & Brown Insurance, Pat Hillen, Homeowner Management Services



(left) Andrew Hixson, National Cooperative Bank, Nicko Romeo, Ray Engineering, Rafael Perez, Ray Engineering



(left) Mike Dangler, Russell Landscape Group, Ross Wetherald, Russell Landscape Group, Ashlie Gray, EPIC



(above) Mike Dangler, Russell Landscape Group, John Haynes, Sentry Management, Russell Estey, Pest USA



(above) David McCord, Team Pest USA, Christine Swenson, Team Management, Mallory Clark, Lueder, Larkin & Hunter



(above) Robert Cairns, Community Specialist, Craig Sears, Sears Pool Management Group



(above) Jeff Creecy, Greenwood Group, John Cockrell, Greenwood Group

(below) Dale Pendergraft, P3 Painting & Renovations, Kyle Mack, Arboguard Tree Specialists



(above) Candy Houser, Avid Contractors, Angela Cox, Avid Pool Management, Jennifer Carter, Avid Contractors



(above) Jason Hunsucker, Lazega & Johanson, Mary Beth Sierra, Coulter & Sierra, G. Lanier Coulter, Jr., Coulter & Sierra



(above) Emily Serebrenick, RooterPLUS!, Jennie Hollis, Outdoor Solutions Group, Becky Schmutzer



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(above) Morgan Cohen, Natural Stone Services, Makayla Hendrix, Community Management Associates, Kevin Wigbels, Community Management Associates, Keith Cash, Northwest Exterminating, Ross Wetherald, Russell Landscape Group, Kevin Tolnai, Colony Roofers



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