

GRAND ADVENTURE

**2024 CACM
SOUTHERN CALIFORNIA
LAW SEMINAR & EXPO**



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2024 CACM SOUTHERN CALIFORNIA LAW SEMINAR & EXPO



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What Defines a Needy Community?

- One with deferred maintenance (plumbing leaks, roof leaks, stucco cracks)
- Confusion of Roles
 - Board Member
 - Homeowner
 - Manager
- Lengthy Meetings/No Decisions



What Defines a Needy Community? (continued)

- Unrealistic Expectations
- Rogue Board Members
- Negative Nellies



How to Take Back Control – Deferred Maintenance

- Association needs to spend money \$\$\$
- Fund the reserves
- Special Assess/Emergency Assess/Bank Loan
- Start somewhere – prioritize and use a timeline
- Questionnaires to membership about maintenance items



How to Take Back Control – Deferred Maintenance

(continued)

- Consequences for failing to maintain
 - Fannie Mae Guides, Fannie Mae Blacklist
 - Litigation
 - Insurance increases
 - Emergency Assessment



How to Take Back Control – Deferred Maintenance

(continued)

- Lean on your supervisor for help
 - Make sure supervisor understands the time you are investing
 - Bring supervisor to a meeting as back-up/reinforcement
 - Internal discussion on termination of association that fails to make repairs, spend money, follow legal advice



How to Take Back Control – Confusion of Roles

- Annual Meeting- time to educate!
 - Inform homeowners as to management and board roles
- Determine Board Liaison for Management
 - “One Voice”
- Annual board training from management or legal on expectations and roles



How to Take Back Control – Lengthy Meetings/No Decisions

- Consider a Consent Calendar
- Use a Timed Agenda
- Agenda should contain action for business
- Consider creating committees to reduce workload
 - Enforcement Committee
 - Legal Committee



How to Take Back Control – Unrealistic Expectations

- Be transparent – review management contract with board
- Provide consistent and periodic reports to the Board
 - * Action List
 - * Use technology (Excel spreadsheet, Outlook flags)
 - * Tracking Sheet
 - * Periodic status updates to board on projects
- Give clear directives to vendors
- Gain agreement with board as to what projects are a priority
- Inform your supervisor (and legal, if needed!)



How to Take Back Control – Rogue Board Members

- Document, Document, Document
- Inform your Supervisor
- Encourage Board to self-police
- Bring in legal



How to Take Back Control – Negative Nellies

- Communicate, Communicate, Communicate!
 - Use Email blasts, newsletters, welcome package, communication as to expected response times from management
- Don't Call Management – Fire, Flood or Blood!
 - First phone call might need to be the police
- Include homeowner correspondence in board packets
- Let homeowners know of cost for non-emergency calls made to emergency line



Managers – Carve Out ME Time!

- You can't manage associations if you don't take time for YOU
 - Calendar activities (long weekend, movie, spa day)
 - Fun Friday at the management office
 - Take up a new hobby!



Q & A

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