



Navigating Community Management: Strategies and Operations

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Fred R. Gray, President



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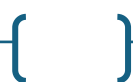
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Navigating Community Management: Strategies and Operations

Part One: Management and Strategic Planning

The community association is all about serving its members. Think of it as a group that takes care of the maintenance and services that homeowners expect. To make this happen, the association first figures out what resources are needed to provide those services, which is part of the budgeting process. Then, it collects money from the homeowners based on the rules laid out in the governing documents—this is known as the assessment process. Finally, the association spends the collected funds according to the budget and in line with what the members want, all while following the community's governing documents.

One of the biggest challenges in understanding how community associations work is realizing that they operate like a small government, similar to a city or county. They provide essential public services that contribute to our everyday lives. Interestingly, these associations have the authority to levy what's essentially a tax, known as an assessment, which is crucial for funding their operations.

Anyone involved in managing a community association needs to grasp its structure and the source of its powers and responsibilities. These powers come from the founding documents. For example, in a condominium, these documents include the Declaration of Condominium, the Articles of Incorporation, and the Bylaws. Other types of community associations have similar documents, like the Declaration of Covenants and Restrictions, along with their Articles of Incorporation and Bylaws. Additionally, state statutes provide further authority and guidance, including the

Condominium Act — Chapter 718, F.S.

Cooperative Act — Chapter 719, F.S.

Timeshare Act — Chapter 721, F.S.

Not-For-Profit Corporation Act — Chapter 617, F.S.

Understanding these elements is key to effectively managing a community association.

When it comes to community associations, there are basically three main types, though you might come across some hybrids that mix elements from these basics. The three primary types are Condominiums, Cooperatives, and Homeowners' Associations. Each has its own unique features, but they all serve the purpose of bringing people together in a community setting.

Types of Community Associations

When it comes to community associations, there are basically three main types, although you might come across some hybrids that mix elements from these basics. The three primary types are condominiums, cooperatives, and homeowners' associations. Each has its own unique features, but they all serve the purpose of bringing people together in a community setting.

The Condominium

The concept of a condominium revolves around the idea of shared ownership of common areas. When you buy a condominium unit, you not only get ownership of your specific unit but also a share of the common elements that everyone in the community uses. To better understand this, you can refer to Chapter 718.106 of the Condominium Act, which outlines some key points.

First off, a condominium parcel is considered a separate piece of real estate, even if it's built on leased land. When you purchase a unit, you also gain certain rights and privileges. For instance, you receive an undivided share of the common elements and any surplus, along with the exclusive right to use specific parts of those common areas as outlined in the declaration. You also have an exclusive easement for the airspace above your unit, which remains valid as long as the unit exists in its current form or is modified in the future. If that airspace is vacated, the easement automatically ends. Additionally, you become a member of the association mentioned in the declaration, which comes with voting rights, and you may have other rights as specified.

As a unit owner, you have the exclusive right to enjoy your unit, but you must also respect the rights of your neighbors. You can use the common areas as intended, but your use shouldn't interfere with others. In Florida, when you buy a condominium, you automatically join the association, which is responsible for maintaining the common areas. You'll need to pay your share of the maintenance costs through assessments, which are determined by the budget and your ownership share. This assessment system applies to condominiums established after 1975.

Typically, the management of a condominium is handled by a corporation, with a board of directors overseeing operations and officers managing day-to-day tasks. Nowadays, many associations hire professional management companies because

unit owners often find it challenging to manage everything themselves. These professionals step in to handle the management duties, ensuring everything runs smoothly for the community.

The Cooperative

A cooperative is quite similar to a condominium, but the key difference lies in how ownership is defined. According to Chapter 719 of the Florida Statutes, an "association" refers to the corporation—whether for profit or not—that holds the official interest in the cooperative property or a lease on it. This association is responsible for managing the cooperative. When we talk about a "cooperative," we're referring to a type of real estate ownership where legal title is held by a corporation or another entity. The individuals who own shares in this corporation have beneficial use of the property, which is typically evidenced by their ownership interest in the association and a lease or other document that grants them rights to a specific unit.

Speaking of units, these are parts of the cooperative property that owners can use exclusively. A unit can be just land, just improvements, or a combination of both, as outlined in the cooperative documents. When someone buys a unit in a cooperative, they essentially purchase a share in the corporation, along with a lease that gives them exclusive rights to that unit. However, with this ownership comes the responsibility to help maintain the common areas of the property. This is where the association comes in; it has the right to assess fees and can even place a lien on a unit if necessary.

The association manages the cooperative and takes care of the common areas, while the unit owners are responsible for maintaining their individual units. Together, they work to establish a budget, assess fees for unit owners, and use those funds to benefit the community, all in line with the cooperative's governing documents and the wishes of its members.

(See 719.103(2), 719.103(9), 710.103(15), Florida Statutes.)

The Homeowners' Association

The third main type of community association is what we typically call a homeowners' association, or HOA for short. This kind of association usually comes into play with developments that aren't condominiums or cooperatives. In these setups, when someone buys a property, they actually get ownership of a lot along with any improvements made to it. But there's more to it than just owning the land; when you buy a lot, you also become a member of the homeowners' association. The main goal of this association is to provide amenities that you wouldn't normally have access to as a standalone lot owner.

So, what kind of amenities are we talking about? Well, many HOAs offer recreational facilities like swimming pools, tennis courts, shuffleboard areas, parks, and

sometimes even a clubhouse or recreation building. In some cases, the association takes care of things like roads, sidewalks, landscaping, security, and even water services. The specific services and amenities can vary based on the governing documents of the association.

Typically, you'll find a Declaration of Covenants and Restrictions that outlines the rules and guidelines for the community. This document essentially sets up deed restrictions, but it makes enforcing those rules a bit easier for everyone involved.

So, let's chat about community regulations in Florida. Before October 1, 1992, these types of communities were pretty much flying under the radar without much oversight. That all changed when the state introduced some regulations through amendments to Chapter 617, which kicked in on that date. Since then, there have been several updates to the laws to better manage these communities. For instance, in 1999, the legislature rolled out Chapter 720, which specifically addresses Homeowners' Associations (HOAs). This new law includes definitions that clarify what types of communities fall under its regulations.

According to the law, a "community" refers to any real property that's subject to a recorded declaration of covenants in the county where it's located. This includes all kinds of properties, even those that are still undeveloped, as long as they're part of a larger development plan. On the other hand, a "homeowners' association" is defined as a Florida corporation that manages a community. The members of this association are typically the property owners or their representatives, and being part of the association is a requirement of owning a parcel in that community. They have the authority to impose assessments, which can turn into liens on properties if they go unpaid. However, it's important to note that this definition doesn't cover community development districts or similar special taxing districts.

The association itself is responsible for managing the community, with a board that acts as the governing body and officers who support the board's efforts. Nowadays, many of these associations are opting for professional management to handle their operations. Generally, the maintenance responsibilities of a homeowners' association are less extensive than those of condominiums or cooperatives. In an HOA, the association typically doesn't take care of individual lots or the homes on them; that's up to the homeowners. Instead, the association focuses on maintaining shared property that all members can use.

(See 720.301 homeowners' associations: definitions.—)

When we look at different types of community associations, they all share similar functions. The association serves as the link for maintaining common areas, regardless of how extensive those areas are. Their management role involves figuring out what services are needed, estimating costs, assessing the homeowners based on the governing documents, and then getting those services done.

Part Two: Strategic Planning

The management process is often seen as something that just happens on its own, but it actually involves a lot of analysis and planning. Instead of waiting for things to unfold, we can take a more proactive approach by using strategic planning. This way, we can better prepare for the future and make more informed decisions.

Strategic planning is essentially a management tool designed to help community associations improve their effectiveness. At its core, it's all about focusing energy and ensuring that everyone in the association is working towards the same goals. It allows the association to assess its direction and make adjustments as needed, especially when the environment around it changes. In simple terms, strategic planning is a structured effort to make key decisions and take actions that define what an organization is, what it does, and why it does it, all while keeping an eye on the future.

Breaking down this definition reveals some important elements that contribute to a successful strategic planning process. First off, it's called "strategic" because it's about figuring out the best ways to respond to the association's environment, even if that environment is unpredictable. Being strategic means understanding the association's goals and resources and being ready to adapt to changes.

Next, the planning aspect involves setting clear goals and figuring out how to achieve them. It's a disciplined process, which means there's a specific order and structure to keep everything focused and productive. Throughout this process, planners will ask a series of questions that help them reflect on past experiences, challenge assumptions, gather current information, and anticipate future conditions.

Ultimately, strategic planning is about making fundamental decisions and taking actions based on those decisions. It's about determining what's most important for the organization's success, which often means making tough choices about what to prioritize. While strategic planning can be complex and sometimes messy, it always revolves around these basic principles. Whenever you feel lost in your own strategic planning efforts, you can return to these fundamentals for guidance.

Strategic Planning and Long-Range Planning

While many people tend to use the terms "strategic planning" and "long-range planning" interchangeably, they actually focus on different aspects of planning. Long-range planning typically refers to creating a plan to achieve specific goals over several years, based on the belief that our current understanding of future conditions is reliable enough to make that plan work throughout its implementation.

In contrast, strategic planning recognizes that an organization needs to be flexible and responsive to a constantly changing environment, rather than relying on the more stable conditions assumed in long-range planning. This means that strategic

planning emphasizes the importance of making decisions that will help the organization adapt successfully to any changes that come its way.

Strategic Thinking and Strategic Management

Strategic planning really shines when it supports strategic thinking and leads to effective management, which is essential for any successful association. So, what does strategic thinking involve? It's all about asking ourselves, "Are we doing the right thing?" To answer that question, we need to keep three important things in mind. First, we should have a clear purpose guiding us. Second, we need to understand our environment, especially the factors that might help or hinder us in achieving that purpose. Lastly, we must be creative in figuring out how to respond to those challenges.

Now, when we talk about strategic management, we're referring to how we apply that strategic thinking to actually lead the association. This approach is flexible and helps keep the association relevant in a constantly changing world. In fact, it's often more effective than the old mindset of "if it ain't broke, don't fix it." In today's dynamic environment, being proactive and adaptable is key to success.

What Strategic Planning Is Not

When we talk about strategic planning, it's helpful to understand not just what it is, but also what it isn't. For starters, strategic planning is all about making fundamental decisions and taking actions, but it doesn't try to predict future decisions. Instead, it focuses on anticipating what the future might look like while making decisions based on the present. This means that organizations need to stay updated on changes over time to ensure they're making the best choices possible at any moment. In other words, they have to manage and plan strategically.

Some people think of strategic planning as just a tool, but it's important to remember that it can't replace the judgment of leadership. Leaders need to take a step back and ask themselves key questions like, "What are the most important issues we need to address?" and "How should we respond to them?" Just like a hammer doesn't build a bookshelf on its own, the data analysis and decision-making tools in strategic planning can't make an organization successful by themselves. They're there to support the intuition, reasoning, and judgment that the people involved bring to the table.

Lastly, while strategic planning is often described as a disciplined process, it doesn't always flow smoothly from one step to the next. It's actually quite creative, and sometimes the insights gained today can change the decisions made yesterday. The process often involves moving back and forth several times before arriving at a final set of decisions.

Key Definitions

Strategic

When we talk about strategy, many people think of war and outsmarting an enemy, as that's how it's defined in the dictionary. However, in the context of community association management, strategy takes on a different meaning. Here, it's all about adapting to a constantly changing environment while working towards the goal of effectively running the association and taking care of shared properties. So, thinking strategically really means staying informed and being aware of these changes, allowing you to respond thoughtfully and effectively.

Planning

Strategic planning is all about setting clear goals and figuring out how to reach them. It's a deliberate process where you decide what future you want and then create a plan to make it happen.

Fundamental

You know, when it comes to strategic planning, it's all about recognizing that we can't do everything at once. Some decisions and actions are just more crucial than others. The key decisions really focus on understanding what an organization is all about and why it exists in the first place. Meanwhile, the most significant actions revolve around what the organization actually does. On the flip side, strategic thinking is all about figuring out and executing those essential actions that really matter.

Disciplined

Discipline plays a crucial role in strategic planning, as it helps us understand how all the different steps are connected. For instance, our mission is influenced by the environment we operate in. To figure out which actions are most important, we need to assess our strengths and weaknesses, as well as the opportunities and threats we face. Strategic planning also involves a disciplined approach where we typically ask a series of questions. These questions help us reflect on our past experiences, challenge our assumptions, gather relevant information about our current situation, and even try to predict what the future might look like for our organization.

Decision Making

Strategic planning really revolves around making decisions. When you're going through the structured planning process, you'll encounter a lot of questions that need answers, and that's where choices come into play. At its core, a strategic plan is simply a collection of decisions about what actions to take, how to carry them out, and the reasons behind those choices. So, it's all about figuring out the best path forward!

Long Range Plan

When we talk about long-range planning, we're really discussing the furthest ahead we can reasonably make plans. For many community associations, this long-range plan focuses on the long-term maintenance needs, especially when it comes to capital expenditures and any deferred maintenance issues. Essentially, it's about ensuring that the community is prepared for future upkeep and investments.

Operating Plan

Operating plans are essentially the step-by-step action plans that help an organization achieve the strategic goals outlined in its strategic plan. It's important for an association to create these plans for each of its major organizational units, and they should align with the fiscal year. This way, everyone knows what needs to be done and when, making it easier to stay on track with the overall objectives.

Strategic Management

Strategic planning is all about managing your day-to-day and month-to-month activities with a clear focus on the most important decisions and actions. It's not just about what's happening right now; it's about having a longer-term perspective and setting priorities that come from a solid strategic plan. Plus, we have to keep in mind that the environment is always changing. This means that strategic management isn't a one-and-done deal; it requires us to continually reassess our current plans to ensure they align with our long-term goals.

Inclusive Process

An inclusive process is all about making sure that everyone who has a stake in your association's work gets to take part in the planning. It's important that their voices are heard and that they can contribute in a way that makes sense for them.

Strategic Planning Steps

There are tons of books and articles out there that dive deep into strategic planning, often going into much more detail than what we'll cover here. Our goal is to keep it simple and focus on the essential steps you need to take in the strategic planning process. So, let's break it down into five key steps. While these steps are a solid recommendation, they're not the only way to create a strategic plan. You might find other sources suggesting different steps or variations. Still, the steps we'll outline here capture the core work that needs to be done and the usual outcomes of the process.

Step One - Getting Ready

Before diving into strategic planning, an association needs to take a moment to assess its readiness. This involves looking at a few key issues, but at its core, it really comes down to whether the leaders are genuinely committed to the process and can focus on the bigger picture.

Once an association decides it's ready to start strategic planning, there are five important tasks to tackle to ensure everything runs smoothly. First, they need to pinpoint the specific issues or choices that the planning process should address. Next, it's crucial to clarify roles so everyone knows who is responsible for what. Then, they should create a Planning Committee to guide the process. After that, developing an organizational profile is essential to understand the association better. Finally, they need to identify the information that needs to be collected to make informed decisions. By the end of this initial step, they'll have a solid Work Plan in place to guide their efforts.

Step Two - Articulating Mission and Vision

A mission statement is kind of like an introductory paragraph; it gives readers a clear idea of where the writer is headed and shows that the writer has a solid understanding of their direction. Similarly, a mission statement captures the essence of an association, reflecting its focus and purpose. It typically outlines three key aspects: first, the purpose, which explains why the association exists and what it aims to achieve; second, the business, detailing the main activities or methods the association uses to fulfil its purpose; and third, the values, which are the guiding principles or beliefs that shape the actions of its members as they work towards that purpose.

While the mission statement covers the what, how, and why of the association's efforts, the vision statement paints a picture of what success looks like. Together, these statements help an association create a shared understanding of its strategic goals. By the end of Step Two in the process, you'll have a draft of both the mission and vision statements ready to go!

Step Three - Assessing the Situation

Once an association has committed to why it exists and what it does, it must take a clear-eyed look at its current situation. Remember, that part of strategic planning, thinking, and management is an awareness of resources and an eye to the future environment, so that an association can successfully respond to changes in the environment. Situation assessment, therefore, means obtaining current information about the association's strengths, weaknesses, and performance - information that will highlight the critical issues that the association faces and that its strategic plan must address. These could include a variety of primary concerns, such as funding issues, new program opportunities, changing regulations or changing needs in the client

population, and so on. The point is to choose the most important issues to address. The Planning Committee should agree on no more than five to ten critical issues around which to organize the strategic plan.

The products of Step Three include: a data base of quality information that can be used to make decisions; and a list of critical issues which demand a response from the association - the most important issues the association needs to deal with.

Step Four - Developing Strategies, Goals, and Objectives

Once an association has confirmed its mission and pinpointed its key issues, the next step is to figure out how to tackle those challenges. This involves deciding on broad strategies and identifying both general and specific goals and objectives. These strategies and goals can come from various sources, whether it's individual ideas, group discussions, or formal decision-making processes. Ultimately, what matters is that the leadership team reaches a consensus on how to address the critical issues at hand.

This process can take some time and may require a bit of flexibility. During discussions, it's common to realize that more information is needed or that previous conclusions from the situation assessment need to be reassessed. Sometimes, new insights can even shift the focus of the mission statement itself. It's crucial for planners to feel comfortable revisiting earlier steps in the process and using any new information to develop the best possible plan.

By the end of this stage, the association will have a clear outline of its strategic directions, including the overarching strategies, long-term goals, and specific objectives aimed at addressing the critical issues.

Step Five - Completing the Written Plan

So, we've got the mission laid out, the important issues identified, and the goals and strategies all agreed upon. Now, it's time to put everything down on paper. Typically, one person from the Planning Committee, someone from management, or even a planning consultant will take the lead in drafting the final planning document. Once that's done, it gets sent out for review to all the key decision-makers, which usually includes the board and management.

This is also a good moment to check in with management to see if the document can be turned into operating plans—those detailed action plans that will help achieve the goals set out in the strategic plan. We want to make sure the plan addresses key questions about priorities and directions in enough detail to really guide us moving forward. It's important that revisions don't drag on for months; we should tackle any significant questions that come up during this stage. Ignoring conflicts just to speed things up would be a mistake, as unresolved issues could weaken the effectiveness of the strategic directions the planning committee has chosen.

In the end, what we're aiming for in this step is a solid strategic plan!

The Benefits of Planning

When it comes to planning, there are some real advantages to both the process itself and the final document that comes out of it. The activities that management and boards engage in during the planning process actually help them become more effective in their roles. They turn into more informed leaders, managers, and decision-makers. Plus, the final planning document serves as a handy tool for managing the association efficiently.

The amount of time spent on planning can really vary from one association to another, depending on the resources available. Whether you choose to have a quick two-day meeting or take a whole year to work through the process, your association will start seeing benefits right away. Some key perks of going through the planning process and creating that final plan include having a clear framework and direction that supports both governance and management. It helps everyone share a common vision and purpose, which boosts commitment to the association and its goals.

Additionally, it leads to better quality services for unit owners and provides a way to measure those services. You'll also be able to set priorities and align resources with opportunities, tackle risks from the outside world, and have a solid process in place for managing crises. Overall, investing time in planning pays off in many ways!

Key Factors that Must be in Place Before Beginning the Planning Process

When it comes to any big project, having a solid planning process is crucial for an association. But before diving in, there are some key elements that need to be in place to make sure the planning is effective and beneficial. First off, it's really important to honestly evaluate whether the association is ready to start planning. If you find yourself halfway through the process and realize that the timing isn't right, it's better to pause and address the issues before moving forward. Many associations jump into planning too soon, and as a result, they often end up with disappointing outcomes.

So, what should you check off your list before committing to the planning process? For starters, you need strong, engaged leadership that will be involved throughout the entire planning journey. It's also essential to resolve any major crises that could distract from long-term thinking—things like financial issues or legal troubles that need to be sorted out first. Additionally, the board and staff should be on the same page, free from any serious conflicts, and have a clear understanding of what planning can achieve and what it can't.

You'll also want to ensure that there are enough resources available to evaluate current programs and meet both current and future needs of clients. Finally, it's important to foster a culture that encourages questioning the status quo and exploring new ways to improve how the association operates. By addressing these elements, you'll set a solid foundation for a successful planning process.

Once the Decision to Plan Has Been Made

The planning process is a lot like any other process—it really needs to be managed well. When people hear the word "planning," they often have a bunch of expectations, so it's crucial to ensure that everyone is on the same page with the same understanding. That's why many associations take the time to train their key board members and staff in the language of process and planning before diving in.

Now, when it comes to large groups, they're not the best at creating documents or making quick decisions. Instead, they shine when it comes to providing feedback, sharing ideas, and suggesting changes to existing documents or draft decisions after the initial analysis is done. This is where a strategic planning committee comes into play. Think of it as the quarterback of the team—it leads the charge and focuses everyone's energy and responsibilities, but it doesn't handle every single decision or detail on its own.

Another important aspect of the planning process is figuring out what information will be needed. Key decisions are made during planning, and for those decisions to be solid, both decision analysts and decision makers need access to the right financial, program, and client information.

Lastly, a useful tool in managing the planning process is a work plan, or what you might call a "plan to plan." This is basically an outline that lays out the steps and activities involved in the planning process. It details the tasks, expected outcomes, resources needed (like time and money), and who's responsible for each phase. This way, everyone knows what to expect and can stay organized throughout the process.

Steps to Prepare for Planning

To get ready for the planning process, there are a few important steps you need to follow. First, it's crucial to secure a formal commitment to move forward with planning. This might include educating your board and staff if they need a bit of background. Next, you'll want to put together a strategic planning committee. Aim for a group of about five to seven people, mixing visionaries with those who are more action-oriented, or you could appoint a planning liaison to lead the charge.

After that, it's time to create a work plan, or as some call it, a "plan to plan." This should clearly outline who is responsible for each task and set some timelines. Don't forget to think about the resources you'll need—both financial and time-wise—to ensure the planning process is thorough and effective.

When you're bringing people into the planning process, it's essential to ask and answer some key questions to make sure everyone's involvement is meaningful and beneficial. For your organization, consider why it's important to have a diverse group of people involved. Who exactly should be included? When we talk about stakeholders, who are we referring to? Are there individuals who might not be the usual suspects but could offer valuable insights? Also, think about what factors you should consider when deciding if someone is a good fit for the planning process.

Finally, you'll want to clarify how to involve these individuals. What roles will they play, and what do you hope to achieve through their participation? By addressing these questions, you can set the stage for a successful strategic planning process.

Planning Should Be an Inclusive Process

When you're planning for your association, it's really important to involve everyone who has a stake in its success—this means board members, staff, and other interested individuals. By making the process inclusive, you not only generate excitement and commitment from both inside and outside the organization, but you also encourage people to take ownership of the goals and work towards achieving them. Plus, it helps ensure that the information you gather truly reflects the needs and views of both your internal team and external stakeholders.

Having a diverse group involved also brings a level of objectivity to the table. Sometimes, those who are outside the organization can spot jargon or ask tough questions that those on the inside might overlook. This collaboration lays the groundwork for strong working relationships in the future and helps everyone align with a common purpose. It also fosters ongoing communication among staff, management, customers, and unit owners, which is crucial as the association develops its operating plans. Overall, an inclusive planning process is key to building a successful and cohesive association.

The Planning Committee

Having a formal planning team or committee is really important for guiding the planning process. Now, this committee isn't expected to do all the work themselves; instead, their main job is to make sure everything gets done. Think of them as the backbone of the team. They kick things off by creating the first drafts of planning documents, figuring out which stakeholders to involve, and deciding how and when to bring them into the conversation. They also help prioritize and narrow down the information that the association needs to discuss and evaluate. Overall, the committee plays a key role in keeping the whole process running smoothly and efficiently.

The Mission Statement

The following concepts are critical in defining "who" your association is:

The Purpose Statement

A purpose statement is all about clarifying what your association aims to achieve. It answers the big questions: Why does your association exist, and what do you ultimately hope to accomplish with your work? Typically, these statements include two key elements. First, there's an infinitive verb that shows the change you want to make, like "to increase," "to decrease," "to prevent," or "to eliminate." Second, you need to identify the specific problem or condition that you're looking to change. When defining your purpose, it's really important to concentrate on the outcomes and results you want to see, rather than just the methods you'll use to get there.

The Business Statement

This statement explains the activities or programs that your association has decided to focus on to achieve its goals. In simple terms, it's all about answering the question, "What are we going to do to reach our purpose?"

How To Write a Mission Statement

Finding the right wording for your association's mission statement isn't something that comes with a set formula. It can be crafted by a single person or developed through discussions at a board meeting or an owners' workshop. What really matters is that everyone agrees on the key points that will shape the mission statement.

One effective way to tackle this is by dedicating some time during a board meeting to discuss the important questions that will guide the mission statement. This not only helps identify areas where everyone is on the same page but also highlights any differences in opinion. Plus, there's a real benefit to the process of working through the mission statement together.

While groups excel at brainstorming big ideas, writing isn't always their strong suit. So, it's a good idea to have those discussions about the overarching concepts and then let one or two people take the lead in drafting the wording. After they've put together a version, it's crucial to share it with the group for feedback. Make sure to circulate the draft mission statement a few times among the board and management to ensure everyone has a chance to weigh in before finalizing it.

The Vision Statement

Tom Peters, a well-known management author, emphasizes that having a clear vision of where you want your association to go is crucial for achieving high performance. Think of a strategic plan as the "blueprint" that outlines the work ahead, while the vision serves as the "artist's rendering" that illustrates what success looks like once that plan is put into action. There's a fundamental rule when it comes to planning: your achievements will always be limited by the vision that drives you. So, if you want to reach new heights, it all starts with having a strong and inspiring vision. . (Quoting Tom Peters, "The most significant driver (of a company) is the quality of the first-line manager." (RogerDooley.com/podcast)

How a Vision is Used

When it comes to implementing a strategy, having a clear vision is actually more important than just formulating one. This is because the way we develop our strategy really hinges on what we're trying to achieve and the core purposes of our organization. A mission statement helps clarify why our association exists, what business we're in, and what values we hold dear. But a vision goes a step further; it paints a picture of what success looks like. It's this compelling image of success that truly inspires people to come together and work towards a common goal.

A good vision statement should be realistic and believable, clearly articulated, and easy for everyone to understand. It needs to be ambitious yet appropriate, and flexible enough to adapt to changes. Essentially, it should focus the group's energy and guide their actions, all while aligning with the organization's values. In a nutshell, a vision should not only challenge the group but also inspire them to reach their mission.

The Process for Creating a Vision

Creating a vision is a lot like strategic planning; it really starts with your intuition and a bit of dreaming. A great way to kick off this process is by brainstorming with your unit owners or board about what you all want to achieve in the future. It's important to discuss and jot down the values that you share as you work towards that vision. Don't worry if everyone has different ideas—those differences can actually be a good thing! They can inspire each other to think bigger and bolder, leading to dreams that are not only ambitious but also worth the effort to pursue. After all, these are the kinds of dreams that can change the world!

The Draft and Review Process

So, who actually writes the strategic plan? Well, it's usually best if just one or two people take on the writing, rather than having a whole group involved. This way, the writer can effectively present the ideas that the group has come up with. Typically,

management might draft the plan, or it could be a board member or a consultant who's been working closely with the planning committee. But honestly, it doesn't really matter who puts pen to paper; what's crucial is that the plan accurately reflects the decisions made, embodies a shared vision, and has the backing of everyone who will be responsible for implementing it.

That's why the review and approval process is so important—it's way more significant than who actually writes the document. The planning team should decide ahead of time who gets to review and give feedback on the draft. Of course, committee members will be involved, but should the entire board and staff also weigh in? The key idea here is that anyone who will help carry out the plan should have a say in shaping it. Whether they get to review the final drafts really depends on the specific situation of the organization.

Ideally, by the time the draft is ready, the major ideas should have already been discussed and settled, so any revisions will mostly just involve adding details, tweaking the format, or adjusting some wording. The planning committee needs to take charge by setting a realistic timeline for the review process and ensuring it wraps up on time. They should determine who will review the plan, distribute copies to those selected, and set a deadline for feedback—usually giving people one to two weeks is enough. Once all the feedback is in, the committee will need to decide which suggestions to incorporate into the document before presenting the final strategic plan to the full board of directors for approval.

Standard Format for a Strategic Plan

A strategic plan is basically a document that lays out the purpose of an association, what it aims to achieve, and the steps it will take to get there, all in about ten pages. It's meant for anyone interested in understanding the association's key ideas, issues, and priorities—think board members, management, volunteers, and unit owners. The goal is to create a document that provides clarity and direction, so the more organized and concise it is, the more likely it is to be useful and actually used in guiding the association's operations. There's a common format for these plans, which includes brief descriptions of each part to help writers get their thoughts and materials in order. However, this is just one approach; the main thing is to clearly explain the association's future plans, and the format should support that message.

Table of Contents

Table of Contents for the Strategic Plan

When putting together a strategic plan, it's essential to include a table of contents to guide readers through the document. Here are the key sections that are typically included:

Introduction by the Association President

First up is the introduction, which usually comes in the form of a cover letter from the association's president. This letter serves as a warm welcome to the readers and gives the plan a "stamp of approval." It shows that there's a solid level of agreement within the association about the direction they're heading. Sometimes, this introduction is combined with the Executive Summary, which we'll discuss next.

Executive Summary

Next, we have the Executive Summary. This section is crucial because it condenses the entire strategic plan into just one or two pages. Here, you'll find references to the association's mission and vision, along with a highlight of the long-range goals—essentially, what the association aims to achieve. It's also a good place to mention how the plan was developed and to express gratitude to everyone who contributed to the process. By the end of this summary, readers should have a clear understanding of what's most important to the association.

Mission and Vision Statements

Moving on, we have the Mission and Vision Statements. These statements are powerful on their own and don't really need any introduction. They effectively introduce and define the core purpose and aspirations of the association.

Association Profile and History

In the next section, the Association Profile and History, readers will get a glimpse into the story of the association. This part typically spans one or two pages and covers key events, triumphs, and changes over time. It's important for readers to understand this historical context, just as the planning committee needed to when they kicked off the planning process.

Critical Issues and Strategies

Finally, we arrive at the Critical Issues and Strategies section. Some associations might skip this part and jump straight to the goals and objectives, but including it can be really beneficial. This section lays out the strategic thinking behind the plan, allowing board and staff leaders to revisit their assumptions. Plus, it helps external

readers grasp the association's perspective. You can present this section as a brief outline or as a more detailed narrative that spans several pages.

Program Goals and Objectives

When we talk about the program goals and objectives, we're really diving into the core of our strategic plan. While our mission and vision help us answer the big questions about why our association exists and how we aim to make a positive impact on society, the goals and objectives lay out our action plan. They detail what we plan to accomplish in the coming years. This section is designed to be a practical guide for our operational planning and a handy reference for evaluating our progress.

Management Goals and Objectives

Next, let's look at the management goals and objectives. Here, we separate management functions from program functions to highlight the difference between service goals and the goals related to the development of the association itself. This distinction helps clarify how these two sets of objectives relate to one another, making it easier for readers to understand the guiding principles of our plan.

Appendices

Finally, we have the appendices. The purpose of including appendices is to provide additional documentation for those who are interested. While some associations choose to keep things brief and may not include any appendices, we believe they should only be added if they genuinely enhance the reader's understanding of the plan. We want to avoid overwhelming anyone with unnecessary data or complicating factors.

Part Three: Maintenance and Operational Standards for the Physical Property of the Association

Facilities Management—Establishing a Maintenance System

In a community association, facilities management is all about taking care of the common areas and property that everyone shares. This includes everything from operating and maintaining to repairing and replacing these spaces. When it comes to maintenance, there are three main goals to keep in mind: first, we want to meet the needs of the residents; second, we aim to preserve and enhance the common property; and third, we need to ensure the safety of everyone—residents, guests, and employees alike.

To create an effective maintenance system, it's crucial for the manager to involve all the right people, including residents, employees, consultants, contractors, and even the developer when necessary. This chapter is designed to guide you in organizing and managing the maintenance needs of your community association. It will walk you through five essential steps to establish a solid maintenance system that works for everyone.

Step One: Develop Maintenance Management Controls

The first step in setting up a maintenance system is to create effective management controls that will help you develop, implement, and evaluate your community's system. So, what exactly are management controls? They're basically tools that help you keep track of everything—think of them as your way to record, remind, and focus attention on maintenance tasks. Common examples include checklists, information charts, calendars or schedules, records of actions taken, inventories, work orders, request forms, and response forms.

You really can't have effective maintenance without these controls. If a manager relies too much on memory or just talking things over, it becomes really tough to keep track of maintenance needs and how they're being addressed. Just a heads-up: any forms or checklists you see in this program are just examples. They're not meant to replace professional advice, like legal or accounting guidance. If you decide to use any of these samples, you might need to tweak them to fit the specific needs of your community association.

Once you have your management controls in place, the next step is to identify the physical assets that need maintenance.

Step Two: Identify the Physical Assets to Maintain

In order to identify the community's physical assets or resources that need to be maintained, you will have to establish a set of comprehensive categories for your community's physical assets and research available sources of information.

(1) Establish a Set of Physical Asset Categories

The purpose of establishing a set of comprehensive categories for your community's physical assets is to ensure that maintenance tracking, recording, and reminders do not overlook any item.

Here is a suggested set of categories for your community's physical assets:

(a) Common Real Property

1. Recreation facilities (For example-pool and spa, tennis courts, clubhouse)
2. Community service facilities (For example-trash storage, recycling facilities and equipment) This refers to facilities for services provided by the community association to individual residents in order to maintain the community's physical assets.
3. Landscaped areas (For example-common areas, front yards, entrance beds)
4. Building exteriors (For example-roofing, gutters, brick walls)
5. Building interiors (For example-entrance access system, plumbing system)
6. Site improvements (For example-streets and drives, exterior parking lot, street light fixtures, common sidewalks, retaining walls, drainage facilities)

(b) Common Personal Property

1. General (For example-community-owned vehicles, mowers, furniture)
2. Office (For examples-office furniture and equipment)

(2) Research Available Sources of Information

Research legal documents to identify the physical assets your community association is responsible for maintaining:

- (a) Governing documents (The primary source)
- (b) State statutes (Secondary Source)
- (c) Board resolutions (Only where the board is empowered to decide.)

After you have identified the physical assets for which your community association has responsibilities, then identify the assets' maintenance needs by means of:

1. Physical inspection of the property to be maintained
2. Examination of available building plans and specifications
3. Review of any reserve studies
4. Examination of any maintenance records
5. Interviews (For example-current board members, authors of any reserve studies, any maintenance employees, and any contractors providing maintenance services)
6. Review of product or equipment information from manufacturers.

The typical management control used to identify physical assets and their maintenance needs is an inventory. This is a record of all real and personal physical property owned and maintained by the community association.

Inventories usually record the following information for every item noted:

1. Date of purchase
2. Warranty
3. Quantity
4. Description
5. Original installer/builder or service contractor
6. Cost
7. Special maintenance needs
8. Estimated replacement data
9. Other

Step Three: Analyze Your Assets' Maintenance Needs

When it comes to figuring out what maintenance your community needs, the first step is to take a close look at each physical asset. This means you'll need to gather some important information to pinpoint what maintenance tasks are necessary and who will be responsible for them.

What Maintenance Needs to Be Done?

To get started, you'll want to document a few key details for every asset. First, describe the asset from a maintenance perspective. Next, outline what specific maintenance tasks need to be performed, how often they should happen, and how

long each task is expected to take. It's also important to establish criteria for what constitutes satisfactory maintenance and to develop both preventive and emergency plans.

Who's Responsible for the Maintenance?

Now that we've covered the planning and organizing part of your community association's maintenance system, let's talk about the people involved. Effective management means leading the human resources that contribute to your community's maintenance efforts. One handy tool for keeping track of who's responsible for maintaining different areas or elements of your property is a responsibility chart. This chart can be shared with unit owners and tenants to clarify roles.

Typically, the responsible parties might include the unit owner, the association itself, the developer, a committee, or even a manufacturer. To determine who should handle the maintenance for a specific asset, you'll need to decide if your association's employees can take care of it or if you'll need to hire a contractor.

A great way to manage this is by using a maintenance contact sheet. This form will help you keep track of contacts for various maintenance services and any important information you might need in case of an emergency. By organizing this information, you'll ensure that your community's maintenance needs are met efficiently and effectively.

***SAMPLE (1) COMMUNITY ASSOCIATION
MAINTENANCE CONTACT SHEET***

Date _____ Manager _____

Association Name _____ City _____ # of Units _____

Cross Streets and Address _____

Management Company _____

CONTACT

Accountant: _____ Phone: _____

Air Conditioning: _____ Phone: _____

Architect/Engineer: _____ Phone: _____

Attorney: _____ Phone: _____

Cleaning Contractor: _____ Phone: _____

Electrician: _____ Phone: _____

Exterminator: _____ Phone: _____

Fire: _____ Phone: _____

Handy person: _____ Phone: _____

Heating System: _____ Phone: _____

Insurance: _____ Phone: _____

Landscaper: _____ Phone: _____

Mail Boxes: _____ Phone: _____

Patrol Service: _____ Phone: _____

Plumber: _____ Phone: _____

Police: _____ Phone: _____

Pool/Spa: _____ Phone: _____

Pool Keys: _____ Phone: _____

Pool Location: _____ Phone: _____

Roofer: _____ Phone: _____

Street Sweeper: _____ Phone: _____

Towing: _____ Phone: _____

Towing Procedure: _____ Phone: _____

Trash Contractor: _____ Phone: _____

TV Cable/Master Antenna: _____ Phone: _____

Utility Emergencies: _____ Phone: _____

Developer: _____ Phone: _____

SAMPLE (2) COMMUNITY ASSOCIATION MAINTENANCE CONTACT SHEET

Community Name: [Your Community Name]
Address: [Community Address]
Phone Number: [Community Phone Number]
Email: [Community Email Address]
Website: [Community Website URL]

EMERGENCY CONTACTS

Contact Name: John Doe
Position: Property Manager
Phone Number: (555) 123-4567
Email: johndoe@example.com
Notes: General inquiries

Contact Name: Jane Smith
Position: Maintenance Supervisor
Phone Number: (555) 234-5678
Email: janesmith@example.com
Notes: Maintenance emergencies

Contact Name: Mike Johnson
Position: Security Officer
Phone Number: (555) 345-6789
Email: mikejohnson@example.com
Notes: Security issues

MAINTENANCE REQUESTS

Service

Contact Name: Sarah Green
Phone Number: (555) 456-7890
Email: sarahgreen@example.com
Notes: Lawn Care and Landscaping

Pool Maintenance

Contact Name: Tom Blue
Phone Number: (555) 567-8901
Email: tomblue@example.com
Notes: pool cleaning and repairs

HVAC Services

Contact Name: Lisa White
Phone Number: (555) 678-9012
Email: lisawhite@example.com
Notes: Heating and cooling issues

Plumbing

Contact Name: Mark Black
Phone Number: (555) 789-0123
Email: markblack@example.com
Notes: Plumbing emergencies

Electrical

Contact Name: Emily Red
Phone Number: (555) 890-1234
Email: lisared@example.com
Notes: Electrical issues

VENDOR CONTACTS

Service

Pest Control

Company Name: Bug Busters
Contact Name: Alice Green
Phone Number: (555) 901-2345
Email: alicegreen@bugbusters.com
Notes: Monthly inspections

Snow Removal

Company Name: Snowy Solutions
Contact Name: Bob White
Phone Number: (555) 012-3456
Email: bobwhite@snowysolutions.com
Notes: Winter Services

Waste Management

Company Name: Clean City
Contact Name: Carol Blue
Phone Number: (555) 123-4567
Email: carolblue@cleancity.com
Notes: Trash and recycling pickup

Painting Services

Company Name: Fresh Coats
Contact Name: David Black
Phone Number: (555) 234-5678
Email: davidblack@freshcoats.com
Notes: Exterior and interior work

ADDITIONAL NOTES

- For urgent maintenance requests, please contact the Maintenance Supervisor directly.
- Regular maintenance schedules can be found on the community website.
- Please report any issues or concerns to the Property Manager.

Last Updated: [Date]

Feel free to modify any of the details to better fit your community association's needs!

Step Four: Establish Five Basic Maintenance Programs

To effectively manage maintenance work, a manager needs to organize the tasks and set up controls to ensure everything gets done. Let's break this down into two main steps: organizing the maintenance work and creating controls to make sure it's completed.

First, you'll want to organize the maintenance work by using your understanding of the community's needs and the board's policies. Start by establishing five basic maintenance programs:

1. **Routine Maintenance:** This is the regular upkeep that happens consistently, like cleaning or mowing the grass. You can define what's expected through job descriptions for maintenance staff or service contracts.
2. **Preventive Maintenance:** This involves periodic tasks aimed at preventing major breakdowns and extending the life of your assets. For instance, you might rebuild pool pumps every five years instead of waiting for them to fail after eight years, or clean sewer lines monthly to avoid backups.
3. **Emergency Services Maintenance:** This is all about being ready for unexpected issues, such as sewer backups or roof leaks. The key here is to anticipate potential problems and have a response plan for each scenario.
4. **Requested or Corrective Maintenance:** This type of maintenance is initiated by requests from owners, tenants, or the board, or it might be identified during routine inspections.
5. **Scheduled Replacement:** This involves replacing assets as they wear out. It's important to base your replacement schedule on a reserve study and budget, but be flexible enough to adjust if you need to replace something sooner than planned.

Once you've organized the maintenance work, the next step is to create controls to ensure that everything is actually getting done. Here are some common management controls you can implement:

1. **Maintenance Calendar:** This is a schedule that outlines what needs to be done throughout the year and how often.
2. **Maintenance Record:** While the calendar shows when maintenance should happen, the record tracks when it actually does. You can note the completion dates directly on the calendar, but having a separate record is especially useful for contracted work. This way, you can verify that tasks were completed before paying any invoices.
3. **Inspection Checklist:** This tool documents your current maintenance standards and helps identify potential issues.

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4. **Inspection Report:** Often referred to as a "punch list," this report compiles all maintenance needs identified during inspections. You can use it to assign tasks to staff or contractors and budget for upcoming maintenance.
 5. **Work Order/Response Form:** This form is essential for assigning work across the five maintenance programs. It can document requests from unit owners and tenants, assign tasks, and serve as a response form to inform owners or tenants when work is completed. It also helps allocate charges when necessary. The benefits of using a work order/response form include identifying whether a need is urgent, ensuring follow-up for satisfaction, monitoring costs, and keeping a history of repairs and any issues reported by residents.

By following these steps, you can effectively manage maintenance work and ensure that everything runs smoothly in your community.

Part Four: Assessing the Strategic Plan's Success to Shape Future Operations

Management Plan

A management plan is essentially a roadmap that outlines the tasks, goals, and objectives that management should focus on to enhance the operations of a community association. Whether you're a manager working directly for the community or for a management company, having a management plan is crucial. It helps ensure that both you and the board are on the same page regarding expectations.

Usually, it falls on you to propose this plan to the board for their approval. When setting your goals for the year, it's important to align them with the community association's budget. A well-crafted management plan typically addresses various tasks aimed at improving the association's operations and boosting property values for the benefit of all owners and members.

Some key areas that a management plan might cover include enforcing rules, maintaining the property through inspections and repairs, and managing services like trash removal and pool maintenance. It also involves effective communication, whether through flyers or newsletters, and keeping a close eye on finances, including budgets and collections. Administrative tasks are part of the mix too, like preparing correspondence and maintaining records. Additionally, protecting the community's assets through insurance and audits is vital, as is developing policies to assist the board in awarding contracts and selecting professional help, like attorneys or accountants.

Regular board meetings should be used to monitor, adjust, and review the management plan throughout the year, ensuring that everyone stays aligned and focused on the community's goals.

Management Evaluation

It's really important for a board to not only evaluate management performance but also keep an eye on it regularly. Since there are interpersonal relationships at play, using objective criteria is key. There are a couple of common ways to assess management. One method is through owner or resident surveys, and another is conducting a management audit.

A management audit involves reviewing several aspects, including the governing documents and existing policies, the current condition of the property, owner and resident satisfaction, and the financial operations. This review can be done collaboratively by the board and the manager, or you might choose to bring in a third-party management consultant for an outside perspective.

Now, there are some warning signs that could indicate weak management. For instance, if you notice an increase in assessment delinquencies that isn't linked to a struggling economy, or if the list of action items for management keeps growing from one board meeting to the next instead of shrinking, that's a red flag. Other signs include more owners showing up at board meetings and voicing complaints about poor service, longer response times for maintenance in common areas, and a noticeable drop in contractor or employee performance. If board members start resigning for "personal reasons," or if you see a surge of owners wanting to run for the board because they have issues to address, those could also be concerning. Lastly, an unusually high turnout at a general or annual meeting that isn't tied to a specific issue might warrant some attention.

While any one of these signs alone might not definitively point to a management failure, it's crucial not to ignore them. If you spot any of these situations, it's best to investigate promptly and as objectively as possible.

What Is Management?

We've all thought about what management really means, and each of us probably has our own take on it. The author of this course really admires Peter Drucker, a well-known figure in the field, and in his book "The Essential Drucker," he shares some insightful thoughts on the topic. Drucker asks a fundamental question: What is management? Is it just a collection of techniques and tricks, or a set of analytical tools like those taught in business schools? While those tools are certainly important—much like a thermometer is to a doctor—Drucker emphasizes that the essence of management is rooted in a few key principles.

At its core, management is about people. Its main job is to empower individuals to work together effectively, leveraging their strengths and minimizing their weaknesses. This focus on human beings is what makes management so crucial in any organization. Today, most of us work for some kind of managed institution, whether it's a large corporation or a small nonprofit. Our livelihoods depend on effective management, and our ability to contribute to society is closely tied to how well the organizations we work for are managed, in addition to our own skills and dedication.

Management is also deeply influenced by culture. While the fundamental tasks of managers in different countries—like Germany, the UK, the US, Japan, or Brazil—are similar, the way they go about those tasks can vary significantly. One of the challenges for managers in developing countries is to identify aspects of their own cultural traditions that can serve as building blocks for effective management. For instance, Japan's economic success can be partly attributed to its managers' ability to adapt and integrate imported management concepts into their own cultural context.

For any organization to thrive, there needs to be a commitment to shared goals and values. Without this commitment, you just have a chaotic group rather than a cohesive enterprise. It's essential for the organization to have clear, simple, and unifying objectives. The mission should be big enough to inspire a common vision, and the goals should be clear, public, and consistently reinforced. The first responsibility of management is to define and exemplify these objectives and values.

Moreover, management should foster growth and development for both the organization and its members as needs and opportunities evolve. Every organization should be a place of continuous learning and development at all levels. This means that training and development should be ongoing.

Organizations are made up of people with diverse skills and responsibilities, so effective communication and individual accountability are vital. Everyone needs to understand their goals and ensure that their colleagues are on the same page. It's important for each person to consider what they owe to others and what they need from them, making sure that expectations are clear.

When it comes to measuring performance, simply looking at output or profits isn't enough. Factors like market position, innovation, productivity, employee development, quality, and financial results all play a critical role in an organization's success and sustainability. Even nonprofit organizations need to evaluate their performance based on various metrics related to their missions. Just as a person needs multiple indicators to assess their health, organizations require a range of measures to evaluate their performance and management, and they should always be striving for improvement.

Lastly, it's crucial to remember that the true results of any organization are found outside its walls. For a business, success is measured by customer satisfaction; for a hospital, it's about healing patients; and for a school, it's about students who learn and apply their knowledge years later. Inside the organization, all you really have are costs. Managers who grasp these principles and operate with them in mind will be the ones who truly achieve success.

CONCLUSION

Just a heads up, these programs aren't meant to give legal advice or interpret the law. If you're involved in managing community associations, it's really important to understand the state and federal regulations that apply. However, it's always a good idea to consult a qualified legal professional when you need help with understanding or applying specific laws and codes.

At Gray Systems, Inc., we strive to provide our clients with accurate and straightforward information. Just to clarify, we don't offer legal, accounting, or any other professional advice; our focus is purely on educational services. If you need more information about the topics we cover, we're here to help with sources and references.

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