

Association Essentials Series

Helping you manage your association



PRESENTER



MICHAEL JOHNSON, CMCA, AMS, PCAM

Founder and CEO | HOALiving Network

- ✓ **27 years in the industry (2 years as HOA President)**
- ✓ **Member of the Community Associations Institute (CAI) Board of Trustees**
- ✓ **National & International Faculty Member for CAI**
- ✓ **Member of CAI's US Government & Public Affairs Committee (Federal Issues)**
- ✓ **Chair of Board Member Education Public Policy Task Force**
- ✓ **Member of Chapter Relations Task Force**
- ✓ **Member of Utah's CAI Legislative Action Committee**
- ✓ **2021 CAI Educator of the Year**

2025 Schedule

COMING SOON!



WELCOME FRIENDS OF



A network of community association management and service companies



CONNECT WITH US



Social Media

Instagram: @hoa_living
Facebook: HOALiving
Twitter: @HOA_Living
LinkedIn: HOALiving



Community Scoop

Watch for our NEW, monthly “Community Scoop” e-newsletter and consider sharing it with your homeowners (past editions are available on our website)



Website/Portal

HOALiving.com

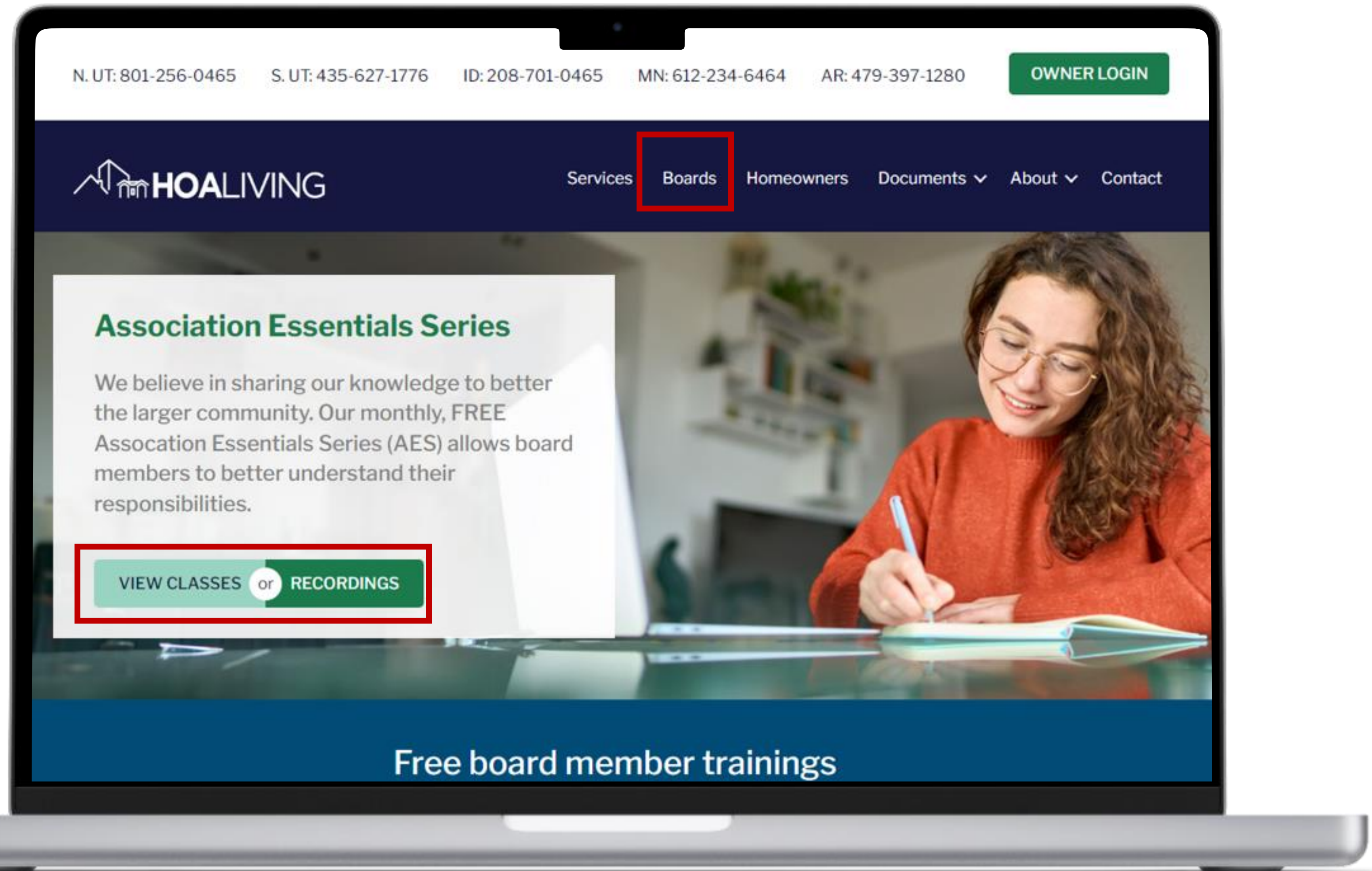
Access the AES schedule, timely updates and reminders, “You and Your Community Association,” contact information, and much more



YouTube

All AES sessions are recorded and posted to our YouTube channel. We recommend the “New HOA Board Member Basics” playlist.

ACCESS PREVIOUS TOPICS



HOALIVING.COM/AES/

- ✓ 101 Series
- ✓ Annual Legislative Updates
- ✓ Improving Efficiency
- ✓ Best Practices

OUR



**COMMUNITY
MANAGER
of the MONTH**

IS...

OUR



IS...

OUR

**COMMUNITY
MANAGER**
of the **MONTH**

IS...

OUR



IS...



Association Essentials Series

Helping you manage your association

HOA COMMUNICATION BEST PRACTICES



“The single biggest problem with communication is the illusion that it has taken place.”

George Bernard Shaw

Boards Must Communicate With:

VENDORS



MANAGEMENT



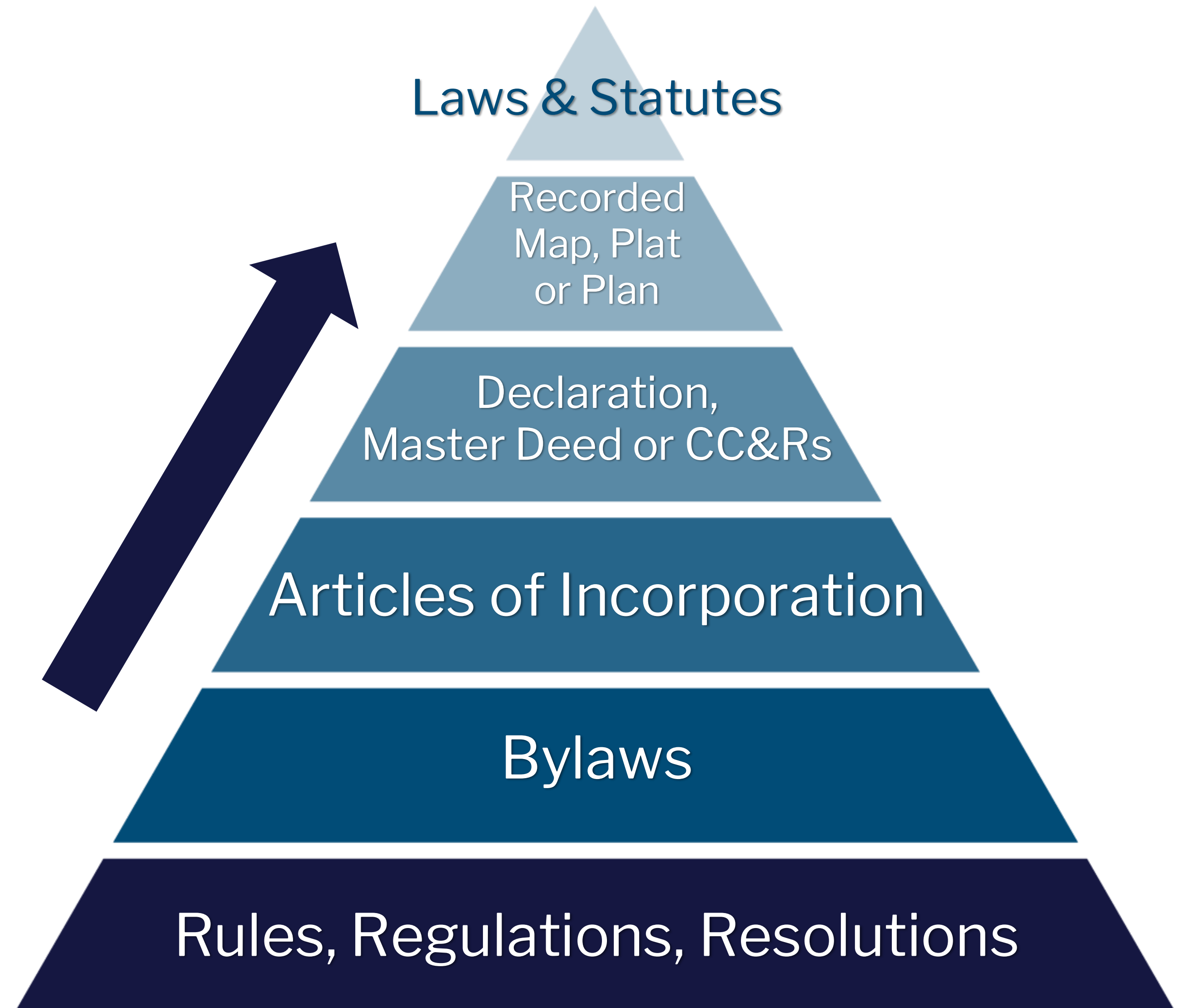
HOMEOWNERS



Hierarchy of Authority

The higher the position,
the *greater* the authority

Governing documents and the
law grant and restrict board
authority to communicate on
behalf of the association



Boards Must Communicate With:

VENDORS



Proposals, Contracts,
Expectations, Scope of
Work, etc.

MANAGEMENT



HOMEOWNERS



Board Communication with Vendors

VENDORS



Consider scope of work according to:

- Health and Safety
- Governing Document Compliance
- Fiduciary Duty
- Resident Expectations

*Previous AES Session:
RFPs and Contract Business Partners*



Board Communication with Vendors

VENDORS



Communicate via Request for Proposal:

- Define project, scope and budget
- Provide background and intro information
- Describe necessary services
- Explain challenges or barriers to success
- Detail selection criteria
- Specify project timeline

Board Communication with Vendors

VENDORS



Communicate throughout the process:

- **Cleanliness expectations**
- **Communication protocols**
- **Payment schedules**
- **Dispute resolution**
- **Standards for parking, waste removal**
- **Project management plans**

Boards Must Communicate With:

VENDORS



MANAGEMENT



Requests, Operational Support, Oversight, Performance Evaluations, etc.

HOMEOWNERS



Board Communication with Managers

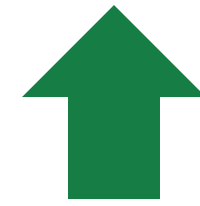
MANAGERS



Communication through:

- Portal Access to Reports 
- Email 
- Onsite Meetings 

Portal Access to Reports



Boards are given:

- **Real-time access to financial reports**
- **Ability to view service request status**
- **Confirmation that collection processes are being uniformly followed**

Log in to your account

Email

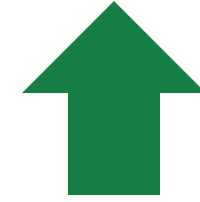
Password

[Forgot your login?](#)

Log In

Don't have an account? [Sign Up](#)

Portal Access to Reports



Association

ARC Report

[View](#)

[Download PDF](#)

Collections Report

[View](#)

[Download PDF](#)

Open Board Invoices Report

[View](#)

[Download PDF](#)

Owner Transfer Report

[View](#)

[Download PDF](#)

Violations Report

[View](#)

[Download PDF](#)

Work Order Summary

[View](#)

[Download PDF](#)

Association Reports:

ARC Report

Collection Report

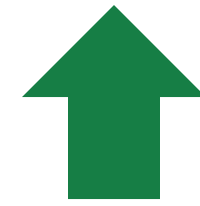
Open Board Invoices Report

Owner Transfer Report

Violation Report

Work Order Summary

Portal Access to Reports



Financials

AP Aging

[View](#)

[Download PDF](#)

AR Aging

[View](#)

[Download PDF](#)

AR Aging By Fund

[View](#)

[Download PDF](#)

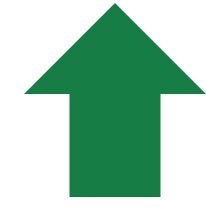
Financial Reports:

AP Aging

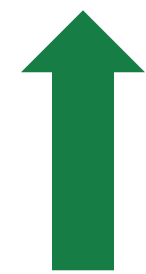
AR Aging

AR Aging by Fund

Work Order Reports



Complete	Service Request / Complete Woodrow Wilson 1913 Pennsylvania Ave	Massive leak everywhere!!!!!!!		
Complete	Service Request / Complete George Washington 1977 Pennsylvania Ave Unit 592 leak	need to fix leak		
Complete	Service Request / Complete Demolition Dude Dave Speed bump Pennsylvania Ave	The new speed bump on Pennsylvania Ave is too high; see the attached picture one homeowner sent us of his dog after passing the bump. We need to lower that thing.		
Complete	Service Request / Complete James Madison 1809 Pennsylvania Ave Unit 312 Catastrophe	My cat got trapped in our blinds! Please send the Fire Department ASAP - she's getting hungry!		
Complete	Service Request / Complete George Bush 1989 Pennsylvania Ave Unit 591 Service Request Received	We have received your request to repair sprinklers. Landscaper has been notified.		



STATUS



ADDRESS



DETAILS



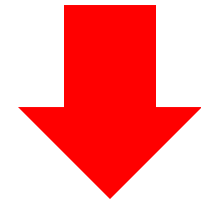
ATTACHMENTS

Collections Reports



⋮ Balance	⋮ Item Details	⋮ Attach	⋮
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
\$20.00	Collections / Closed Shidang He 12223 South 900 East		
\$0.00	Collections (A) / Balance Settled Jeffrey Jacobs 12231 South 900 East pre collection notice		
\$20.00	Collections (A) / Balance Settled Shidang He 12223 South 900 East pre collection notice		
\$0.00	Collections (A) / Balance Settled Thomas J Few Jr 12233 South 900 East pre collection notice		
\$8,345.00	Collections (A) / Balance Settled Steven Ho 12227 South 900 East pre collection notice		
\$0.00	Collections (A) / Balance Settled Jamie Ao 12247 South 900 East Pre collection notice		

Emails



Emailing Managers Best Practices:

- ✓ **Use email to capture written record**
- ✓ **Copy all board members to keep everyone informed**
- ✓ **Use email to communicate with more flexibility than the set time and organization required of meetings**



Onsite Meetings



Onsite Meetings

Having eyes on the association can help clarify expectations and increase collaboration between the board and management

This allows all parties to see the big picture for services and



Virtual meetings are an excellent option when communication is needed but other conflicts stand in the way of onsite meetings

Boards Must Communicate With:

VENDORS



MANAGEMENT



HOMEOWNERS



Community Updates, Rule Enforcement, Event Notices, Financial Transparency, etc.

Board Communication with Homeowners

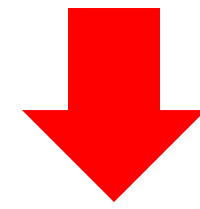
HOMEOWNERS



Communication through:

- Email Blasts 
- Newsletters 
- Townhall Meetings 
- Association Calendar 

Newsletters



PROS:

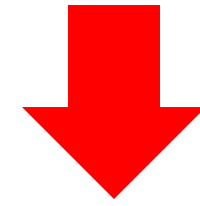
- **Great for straightforward/summarized communication about association happenings**
- **Can be mailed or emailed, depending on association needs and resources**
- **Great for future reference and event reminders**

CONS:

- **Not a great tool for calls to action**



Newsletters



Tips and Tricks for Sending Newsletters

- ✓ Review content prepared by a committee (or any other entity) prior to sending
- ✓ Determine the best delivery method for your homeowners
- ✓ Develop an annual newsletter schedule

Newsletters

Tips and Tricks for sending Newsletters

- ✓ **Review content prepared by a committee prior to sending**

If you need help – speak with your manager about adding this service to your management package

Newsletters

COMMUNITY **SCOOP**

[a HOALiving e-newsletter for board members]

Forward the HOALiving
Community Scoop to
your homeowners as
you see fit!

and we have some catching up to do! Don't miss the
new HOALiving website, the winner and honorable
HOALiving Education Scholarship and some exciting
network.

appreciate the opportunity to live and work in community with you.



Townhall Meetings



PROS:

- **Helpful for providing direct project communication**
- **Can be used to solicit owner feedback about potential process changes**
- **Can help build a sense of community where owners interact and get involved**

CONS

- **Should not be overused, as this can lead to a decrease in attendance and participation**



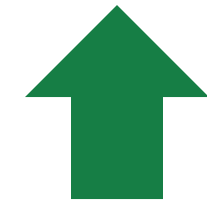
Townhall Meetings



Tips and Tricks for Townhall Meetings

- ✓ **Determine the purpose of the meeting**
- ✓ **Establish a location – virtual or in person**
- ✓ **Prepare the information that will be communicated**

Email Blasts



PROS:

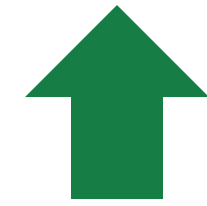
- **Great way to request one-time action from homeowners**
- **Can link to helpful information that can be referenced again later**
- **Can provide updates about amenities, services and community events**

CONS:

- **Emails get lost or ignored in the ever-increasing sea of digital communication**



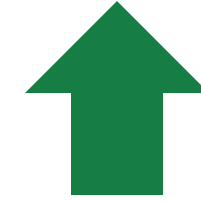
Email Blasts



Tips and Tricks for Email Blasts

- ✓ **Determine the desired frequency of email communication**
- ✓ **Utilize your owner portal**
 - ✓ **Owner portals allow owners to view all communications, including email blasts from the association over the last 30 days**

Email Blasts



[Broadcast Email Message - Message](#)

Thank you to all who participated in the Quarter 4 Board meeting last night. During the meeting, the 2025 Budget was presented, along with the schedule of assessments. Both the Budget and Schedule are attached here for your reference, and are also available on the homeowner portal.

The new rate of assessments is effective on January 1, 2025. If you are signed up on Auto-Draft, no action is necessary, as the system will adjust to withdraw the amount of the billed assessments. If you use a bill pay service through your bank, please make necessary adjustments in order to ensure the payment reflects the new amount. Thank you.

11/21/2024 9:52:29 AM

Dear Homeowners

The swimming pool contractors will be working on some drain vents on the main wastewater drain pipes Friday at 2 am – 6 am, so we will be shutting off water in the early morning on Friday, Nov 22nd starting at 2:00 AM – 6:00 AM.

This is your notice of a water shutoff early morning on Friday, November 22nd from 2:00 AM – 6:00 AM.

[Broadcast Email Message - Message](#)

11/20/2024 4:52:07 PM

Association Calendar



PROS:

- Allows owners to check events as needed and plan accordingly
- Can show when amenities are available for private use
- Scheduling community events promotes a sense of community in a less structured setting

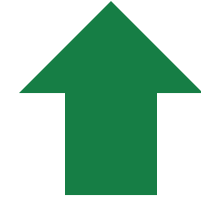
CONS:

- Calendars are great for future event planning, but they are not particularly helpful for short-term updates

The screenshot shows a calendar for November 2024. The calendar is organized by days of the week (Sunday to Saturday). Events are represented by colored blocks: purple for general events and orange for 'Clubhouse Cleaning'. The events are as follows:

Day	Event
Sunday 27	Wadsworth - 6508 S. A
Monday 28	
Tuesday 29	Clubhouse Cleaning
Wednesday 30	
Thursday 31	
Friday 01	
Saturday 02	Boushy - 2773 W. Mat
Sunday 03	
Monday 04	Park - 6469 S. Timpan
Tuesday 05	Clubhouse Cleaning
Wednesday 06	
Thursday 07	
Friday 08	Kimball - 6523 S. Timp
Saturday 09	BLOOD DRIVE
Sunday 10	Oudah - 3063 West 62
Monday 11	
Tuesday 12	Clubhouse Cleaning
Wednesday 13	
Thursday 14	Strunk - 6428 S. Moun
Friday 15	Kimball - 6523 S. Timp
Saturday 16	
Sunday 17	Mitchell - 3138 W. Mar
Monday 18	Park - 6469 S. Timpan
Tuesday 19	Clubhouse Cleaning
Wednesday 20	
Thursday 21	Stott - 2772 W. Matter
Friday 22	Perez - 3152 W. Ivory
Saturday 23	Rodriguez - 2756 W. D
Sunday 24	Mitchell - 3138 W. Mar
Monday 25	
Tuesday 26	Clubhouse Cleaning
Wednesday 27	Holland - 3042 W. Ivor
Thursday 28	Zarandona - 6273 S. M
Friday 29	Cox/Steed - 6361 S. Ac
Saturday 30	
Sunday 01	
Monday 02	Park - 6469 S. Timpan
Tuesday 03	Clubhouse Cleaning
Wednesday 04	
Thursday 05	
Friday 06	
Saturday 07	

Association Calendar



Tips and Tricks for Association Calendar

- ✓ **Create a schedule that includes all board, annual and townhall meetings**
- ✓ **Host community events and add them to the calendar**

Management Communication Help

Management acts at the direction of the board and can assist with communication responsibilities in the following ways (and others):

MANAGEMENT



- **Drafting and sending email blasts through Vantaca to homeowners**
- **Obtaining bids and coordinating with vendors**
- **Drafting and sending community newsletters (\$)**
- **Rule enforcement**
- **Adding information/events to the association calendar (\$)**



Q & A

AES Live Feedback

We want YOUR feedback as we finalize the 2025 AES schedule and future AES content!

Join us now by scanning the QR code with a mobile device OR

Visiting menti.com and using code: 2858 1939



WE WANT
YOUR
FEEDBACK

Fan of AES? Please leave a 5-Star Review!

**Scan this QR code for a
list of review links for
HOALiving Network
Companies and Partners**



**Please consider leaving
a review for the entity
you are most
familiar/affiliated with!**

THANK YOU!

SEE YOU IN 2025

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Essentials
Series

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