

January 2018

COMMUNITY MOMENTS

A REALMANAGE PUBLICATION



Shelly O'Sullivan

Community Association Manager

Northern California

JANUARY

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Editor: Amanda Causey | Design: Averee Chaloupka

Contributors: Joseph Price, Susan Donovan-Smith, Sandra Vela-Mora

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PRESIDENT'S LETTER

Happy New Year! 2017 flew by and it is hard to believe that 2018 is already here. I hope that each of you had an opportunity to enjoy the holidays.

At this juncture, each of your communities should have an operating budget set for 2018. Your RealManage team will be there for you every step of the way, helping you to develop goals for your community and assisting with implementation. Every decision that is made this year will tie back to the goals you have set for each of your communities.

We genuinely welcome your honest feedback regarding your experience with our organization. Therefore, please do not hesitate to reach out by sending an email to clientsatisfaction@realmanage.com. Customer service is one of our top priorities, and we want to ensure you are receiving the best service possible.

I wish everyone the best for a prosperous and happy 2018.



Chris Ayoub

President, RealManage

EMPLOYEE SPOTLIGHT

Shelly O'Sullivan

COMMUNITY ASSOCIATION MANAGER

Shelly is a homegrown Californian beginning her life in Newport Beach which is located in Southern California. From there she made her way up the state to San Francisco where she was an event planner transitioning into a leasing agent with a company that was developing a large development in the area known as South Beach. For those of you who are unfamiliar - South Beach is where the San Francisco Giants' AT&T stadium is located (shared with those of you who appreciate the finer things in life). She moved from the fast lane of San Francisco to the beautiful Marin area of the north where she and her husband of twenty-six years, Martin, raised their two sons.



Marin is where Shelly found the association management industry and quickly found herself totally engaged in the challenges and rewards of our industry. As I was speaking with Shelly about her history you could see the twinkle in her eyes light up as she stated her favorite part of her current position is the team she gets to work with each and every day. "Everyone has an equal part and they all help each other out. If someone needs help 'all hands on deck' is the theme that they embrace." "Family spirit is alive and well in Marin," Shelly explained. Shelly also shared with me that this was not her first "rodeo" with the team in Marin - in fact she is known as what is often referred to as a "boomerang" employee (one who leaves but finds their way back - a good thing). Her supervisor, Barbara Kane, had nothing but glowing praises for Shelly as she commented on the many compliments that she receives not only from her boards of directors but also our valued vendors.

Shelly's additional interests besides her work and family are singing, traveling and being a self-proclaimed foodie- not a bad trifecta of items for hobbies. I

asked her the tough question of what do you want to be remembered for in this world and her answer was as a thoughtful, caring, funny, spiritual person - and yes she is!!

If you want to know how her multiple boards of directors feel about her as their association manager, all you need to do is go to the Google reviews for the RealManage Northern California office where you will find many outstanding comments praising Shelly. Board member David Geffen stated, "A community association management company is only as good as its employees, and the community association managers are the front line, and as such their roles are of paramount importance. Thankfully RealManage has stars like Shelly O'Sullivan. Shelly took over management of our community and got herself up to speed remarkably quickly. She managed our HOA flawlessly and with a sense of humor all year. Thank you Shelly for your excellent work! And thank you RealManage for hiring terrific people like Shelly!" Board member Orhan Ozturk shared, "RealManage and Shelly O'Sullivan have been excellent partners for our Casa Marin townhouse complex of 106 units. Shelly is extremely knowledgeable, very professional, very respectful and still a lot of fun to work with. I don't know how she manages to navigate in between so many different personalities, interests and agendas and keeps everyone smiling but she does! She is a magician in that regard! We are very happy to have her and hope that she stays until she decides to retire!" These are just a few of the many reviews that have been posted over the last month. She has a "5 Star" rating and we agree!

Shelly O'Sullivan has been and is a valuable member of the Marin team - we are proud to have her represent us in this Employee Spotlight.

Written by **Joe Price**
President - Western Region

BOARD MEMBER SPOTLIGHT

Justin Morgan

BOARD PRESIDENT, BROMLEY PARK HOA
BRIGHTON, CO

Justin Morgan, President of the Bromley Park HOA in Brighton, Colorado has been a member of the Board since 2012. After serving five and a half years in the military as a Cellular Communications Sergeant, Justin moved to Bromley Park in 2010. He wanted to better his community and decided to join the Board to do so. After the prior board president resigned in 2016, Justin stepped up to take on the duties of the president. It seems that is his nature.

Along with serving as the president for the association, Justin also serves on the Architectural Committee, often responding to owner requests within hours. He and his wife also spearhead the newsletter, offering relevant content for the community members.

In years past, Justin coordinated a community tree event, where the HOA would sell trees to members at wholesale prices. The board gathers on a Saturday to hand out the trees and then they coordinate with the landscape company for the HOA to have them installed.

When Justin first attended the Bromley Park Santa event years ago, he decided it needed to be bigger and better organized, so he made improvements to ensure weather was taken into consideration. Since the temperature in Colorado in December could be mild or there could be a big snow storm, or even sub zero temps, Justin and the rest of the board decided to rent a large tent with heat lamps. Under the tents they have tables with cookies, cupcakes and other goodies arranged for all in attendance, along with a large thermos of hot cocoa that Justin prepares at his home and carries across the park to the pavilion area where the event takes place. Santa eagerly awaits each child for a photo and he brings one of his reindeer along for petting and pictures. Justin and the other board members help wrangle the reindeer as Cupid and the others can get a bit feisty during the two-hour event.

Justin and the rest of the board, along with their RealManage manager and a representative



of the landscape company, do a spring walk-through each year where every tree in the HOA common areas including the four parks is reviewed. Trees that need to be removed are tagged and those that are stressed or not thriving are noted for further follow-up. The board looks to save money where they can and this past spring, Justin and one other board member spread mulch themselves to save funds for the community.

At board meetings, Justin is a true leader. When issues are presented, Justin offers his recommendations for the board to consider without being overbearing or set in his ways. He empowers each of his fellow board members to offer their opinions and brings issues to the board for discussion. Justin has set the tone for the board to remain reasonable, but consistent in decisions that are made. He truly serves to help the community and does not bring his own personal agenda to the board.

When not working on community matters, Justin enjoys working on his yard and spending time with his wife and two children.

Written by **Susan Donovan-Smith**
Colorado Market Leader

Detecting and Preventing Theft, Fraud, and Embezzlement in HOAs

If you're the member of an HOA board, there are several key signs that you should keep an eye out for in order to prevent yourself from being a long-term victim of fraud. If any of these signs are noticed, you should delve deeper into the organization's finances to be sure nothing more is amiss.

BANK DEPOSITS ARE SIGNIFICANTLY DELAYED

You know when the deposit should have been made, but it's not appearing at the bank in time. You may notice deposits appearing very late or that a deposit has not been made when you are sure that it should have been.

SINGLE-USE VENDORS ARE RECEIVING REGULAR PAYMENTS FROM HOA

Someone who is familiar with the vendors used regularly by the HOA should examine bank records or receipt books on a regular basis to make sure that the payments add up. If you notice that many payments are being made to a vendor that the HOA used only a single time, it's a sure fire sign that there is something more is wrong.

VENDORS' ADDRESSES DON'T ADD UP

It may be that a vendor has only a P.O. Box for an address, which is unusual for most contractors. In other cases, the vendor may have the same address as a member of the board or the HOA. Unless you have deliberately hired someone from inside the association, there's no reason for the addresses to match.

PETTY CASH DISAPPEARS ON A REGULAR BASIS

This is particularly troublesome if you have a large petty cash fund and you know that it has disappeared more than once.

PAY ATTENTION TO THE DETAILS

It's easy to skim over financial records without noting the important details. Unfortunately, simply skimming over them may mean that you are not able to catch the critical warning signs! Make sure any time you look over financial records that you pay attention to all of the details.

CREATE POLICIES TO PREVENT MEMBERS FROM WORKING ALONE

If a board member consistently wants to work alone, where they cannot be observed or checked by other members, it is often a sign that something is wrong. To avoid this, create a policy that requires board members to have checks and balances in place.

DESIGN A SYSTEM OF ACCOUNTABILITY

Make sure to check all the details of the finances and make sure everything is in order.

TRAIN BOOKKEEPERS AND OTHER ASSOCIATION MEMBERS

When members of your association have the proper training, they will be less likely to make financial mistakes that can have big repercussions.

IN SUMMARY

Keeping your HOA safe from fraud and embezzlement is an ongoing challenge. It's critical that you monitor where the money is going within your association and remain proactive in keeping an eye on expenses in order to better protect your organization's funds.

How Do We Change Homeowner Apathy in an HOA?

Homeowner apathy is a question we are asked by numerous boards, and we can all agree, it is a universal problem. Board members should remember that the majority of people do inherently care about their association so they should not feel discouraged. Homeowners simply need certain pushes or opportunities to be placed in front of them as well as the right leaders to cultivate them. Apathy is an issue that we must, at least once, give a hard try to overcome, otherwise, all things will fall on the shoulders of the board, and that is a recipe for burnout. This post will discuss how board members can give a valiant effort to lead their communities through the stagnant fog of apathy with the following steps:

TALK TO YOUR MEMBERS. Whether you are a new community getting started or an established community trying to revive itself, it all starts with engaging the membership. Now, we all know getting a quorum for an annual meeting is hard enough, so it is encouraged to think outside the box and utilize other mediums at your fingertips. Do you have a community website where a survey can be posted or email blast capability? Do a large group of your neighbors participate in a social media site such as NextDoor or Facebook where a survey can be done? When people see that you are interested in their input about their community, they will respond, especially when you make it convenient.

-- Be sure to explain the board's plan once the data is collected and communicate a reasonable timeframe for when the owners can anticipate follow-up.

RECORD YOUR RESPONSES. The worst thing you can do is ask for input and have members think you did nothing with it, so record your response. Not all responses will be helpful or even positive, as we all know almost every community has at least one of "those" neighbors, but take note of the suggestions that are reasonable and make sense. Be sure to thank people for taking the time to respond, which may sound simple, but this one gesture can go a long way in reinforcing to a person that they have been heard.

DECISION TIME. Here comes your significant role as the Leader and where you can really "get it right." The board now must decide what suggestions/project/events they are going to focus on for the community and what type of committee this would fall under. Once the committees are decided upon, the board should type up a brief committee charter which will explain how they will enhance the community, layout their format on submitting requests to the board and what they can expect from the board in return.

-- Remember, for any group of volunteers to be successful; they must fully understand their purpose, limitations, and goals because when they do not, you will lose them as fast as they sign up.

TIME TO FOLLOW UP. Now it is time to follow up with your membership, and hopefully, you have done this within a reasonable time frame of 2-3 weeks of the survey results so as not to lose momentum. Use the same mediums to communicate and possibly even a printed mail out. The communication will be from the board thanking each person for their participation, explaining the time and effort the board has put into reviewing all the responses, analyzing the requests for feasibility purposes, etc. – and yes, they do need to know the efforts the board has put into this project, this all part of gaining volunteers as people will mirror their leaders. A brief description of each committee should be given as well as a listing of the pre-approved projects currently under each one plus a call for volunteers.

ALMOST, BUT YOU ARE NOT DONE YET... So if this works as it should, you now should help your committees set up their first meeting, select a chairperson(s) and explain they will be the point of contact for the Board and find out if they have any questions before sending them forth to prosper.

If, on the other hand, you still do not have enough volunteers, now is the time to put on your PR and marketing hats. Make them feel important; everyone wants that, as a leader one of your jobs is to encourage and now is that time.

APPRECIATE AND RECOGNIZE. Whether it is a simple certificate of thanks at your Annual meeting or an annual committee member dinner that you put arrange, appreciate and recognize all of your volunteers as they are like the rest of us who need that validation to keep going.

This can be a lot to digest for an association board, but remember that by the time apathy has set in, this process is necessary to revive its volunteer base.

Written by **Sandra Vela-Mora**
Senior Vice President - Houston



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