



CAI—COMMUNITY ASSOCIATIONS INSTITUTE 28th Annual Conference & Trade Show January 16, 2010

“So You’ve Been Elected To The Board”

How can I be a good Board member? Preparation, Efficiency & Implementation

A. Preparation & Efficiency

1. There are 3 aspects to efficient management:
 - a. Administrative
 - b. Financial
 - c. Physical
2. Understand the basics of the ICMA and your Association’s governing documents
3. Develop a cursory understanding of how to read your financial documents
4. Understand the contractual obligations of management and/or applicable vendors
5. Learn the details and needs of your property including emergency shut-offs
6. Obtain project proposals and compare vendors on apples-to-apples basis
7. If a task is done more than once, create a form or protocol to standardize the process
8. Create an Operations Manual & Annual Calendar to make the process transparent
9. Do your homework, stay informed on all Association issues and ask questions!

B. Meetings & Implementation

1. Board meetings should be scheduled in advance, ideally at the beginning of the year
2. Working sessions should be considered by the Board to keep projects moving
3. All decisions must be made or ratified at an Open Board Meeting
4. Projects should be assigned to designated contact with short and long-term goals
5. Boards should utilize commissions/committees to engage the Owners, when possible
6. Agendas should be thought through and distributed to owners in advance
7. “Talking Points” can be created for Board internal review to help meeting efficiency
8. Proposals & Management Reports should be reviewed in advance of Board Meetings
9. President should control the Board Meeting and limit discussion times
10. Include “Open Forum” on Agenda for Owners to speak at end of meeting
11. Roberts Rules is recommended using Motions to make decisions
12. Attend board meetings, maintain professionalism and follow all Rules & Regulations
13. All decisions are documented in Minutes; Tabling an issue is a decision



In 2002, Shirley Feldmann founded Association Advocates, Inc. after her board member experiences owning both new construction and conversion condos and realizing that there are few places to turn to for personalized consultation, especially for the newly formed or self-managed association. Shirley teamed up with Angela Falzone to educate consumers on how to protect their investment and increase property values—a unique service especially in this competitive real estate market. AAI has helped more than 100 association clients, ranging in size from 3 to 700 units, management companies and developers—with board training, developer turnover, start-up association procedures, new management searches/transitions, self-management and project management.

PROPERTY CONSULTATION

Angela Falzone
310 Busse Hwy.
Suite 316
Park Ridge, IL
60068
847.685.0710
fax 847.685.0709

PROJECT MANAGEMENT

Shirley Feldmann
4114 N. Lincoln
Suite 312
Chicago, IL
60618
773.348.0742
fax 773.348.0799