



The Regenesis Report



Portland Edition

Innovative Homeowner Association Management Strategies

Priceless

Regenesis means making new beginnings using eternal principles in innovative ways.

Regenesis believes that the goal of every homeowner association board should be to promote harmony by effective planning, communication and compassion.

The Regenesis Report provides resources and management tools for just that purpose. Every month, articles of common interest to homeowner associations nationwide are offered along with innovative strategies for addressing common problems.

Managing an HOA can be a lonely and frustrating task. Take heart. Help is on the way.



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24 Carat News

Homeowner association newsletters are a great way to enlighten, inform, remind and encourage. Inviting the membership to HOA events and meetings helps neighbors meet neighbors. Frequent reminders of important rules or architectural policies helps build a friendlier and more harmonious community. Recognizing volunteer efforts encourages others to step up. Newsletters needn't be long and involved, just relevant. The more you do it, the easier it gets. Here are some tips to make your newsletters pure gold:

Focus on Building Community. Get HOA members to become participants rather than observers. Offer opportunities to do that on committees and social events.

Understand Your Audience. How old are they? What is their financial status? How do they like to spend their time? Find out by getting feedback from your readers with a questionnaire.

Inspire Your Readers. Make sure events, activities and volunteer opportunities are well publicized. Create headlines to grab the reader's attention.

Be Consistent in Layout and Content. If you have a "Rules & Regs Corner" which highlights a particular HOA rule or policy, publish it in every issue. Always include current board and management contact information (mail, email and phone).

Dash the Draft. Write the rough draft as quickly as possible and then go back to polish and flesh out the details.

Archive Your Newsletters and Articles. Many articles bear repeating and as time passes will have new eyes that see them for the first time. Repeat seasonal reminders. Create folders on your computer for the months you publish your newsletter and put article files in the months they fit best. In time, you can build a reservoir of content to draw upon that will make newsletter writing much simpler and quicker.

Lead With Your Strong Suit. Put the most

important information up front. Organize the strongest points of an article before you write it.

Keep Articles Short. If an article is long or complicated, readers will move on. If there is simply too much good content to abbreviate, break the article into several articles.

Give Credit & Contact Information. Include the newsletter committee, writer and editor names and contact information. This rewards volunteers and encourages others to step up.

Be Positive & Uplifting. While criticism has its place, too much of it is a downer and chases most readers away. Strive for the positive. Be upbeat.

Proofread. Editing is a rewording experience. Carefully review your work for grammatical and spelling mistakes or get a detailed oriented person to do it for you. Make sure your facts are straight.

Reprint with Permission. Search the internet for content that would be of interest to your readers. If you find an article that includes author and contact information, be sure to get permission before reprinting and give credit where credit is due.

Have Fun With It. Give them a giggle or two. The internet is full of jokes, puns and cartoons.

Publish Pictures. Folks love to see themselves in the paper. Share event pictures, photos of board members, the manager, committee members and other volunteers.

PDF It. Programs like Adobe Acrobat make it possible to convert word processing and newsletter programs into Portable Document Format (PDF) which can be posted on the HOA website or emailed to those that do

email. PDF was designed with HOAs in mind. Using it can save thousands of dollars in printing, supplies and postage each year plus countless processing hours each year required of paper newsletters.

Get Advertisers. If your HOA is large enough and newsletter regular, it may attract advertisers like real estate agents, insurance agents, painters and remodelers and help pay for itself.

Newsletters are a wonderful way to bind your community together in a custom way. Keep your homeowner association in the know with timely and relevant newsletters at least four times a year. Build community through communication. 🏡

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Article Archive
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Ask the HOA Expert

Q What is the most efficient way to count ballots at an Annual Meeting? Our group has a large membership and vote counting bogs down the meeting.

A With many ballots to count, preparation is essential. The ballots should be preprinted with names of all candidates and a checkbox next to each. A couple of blanks should be left for nominations from the floor at the meeting. After the ballots have been completed, they should be collected by the election team (none of whom should be running for election) and divided into equal parts.

Using several teams of two, one reading the results and the other tallying, ballots can be counted simultaneously by the teams and the final tallies from each team can then be added together for the final results. A Head Teller should check the math, circle the name(s) of the winner(s) and hand the results to the board president to announce. Using this technique will allow the process to be completed

quickly while other business can be handled. The counted ballots should then be batched and stapled to the tally sheets and retained in the annual meeting file should questions about the election arise.

Can the board cite a "long-standing policy" to prohibit construction of an enclosed patio beyond a side privacy wall in my back yard, although there is no written rule or regulation in the documents which would prohibit that?

A It is usually within the board's authority to control the exterior appearance of the homes. Even though the city may issue a permit, the HOA board may have restrictions that override zoning and building codes. So, as a rule, an owner should *always* get approval of exterior modifications before proceeding. If the board has enacted broader

the board can produce an Architectural Design Policy that specifically prohibits it, you should not be restrained from moving forward and should appeal the position to the board.

Q Is it a problem if we are remodeling our clubhouse and a board member charges the materials to her personal credit card?

A Materials should be billed to the HOA and paid by check so the record is clear about what was bought and why. It will also keep the record straight for warranties that are included with the purchases.

Q Our condominium is obtaining bids on roofing, siding, painting and is looking at a special assessment of upwards of \$5,000-10,000 per unit owner due to inadequate reserve funds. What obligation, if any, does the HOA have to disclose this information to prospective buyers, especially in view of the fact that the assessment has not been officially levied?

A While special assessment discussions may not have yet gelled into actual special assessments, it is certainly something that should be disclosed to prospective buyers *by the seller* even if it's only a general statement like, "The board is talking about approving a special assessment for (fill in the blank)". To say nothing about it as if it didn't exist is deceit. The special assessment will take place sometime in the future and buyers should be forewarned. But because the board does not control the sale process, there is no reasonable way for the board to communicate with the buyer unless provided a form which specifically asks for this information. State laws vary on the topic of seller disclosure.

Q We have a number of committees at our HOA. How should they interact with the manager?

A Interaction varies according to committee. Committees are authorized to do what the board

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architectural design restrictions than are found in the governing documents, these need to be made known in writing to all owners. It is not fair to expect owners to know these things by intuition. Also, such restrictions need to be reasonable. If your proposed enclosure is not visible from the street, does it really make a difference? Based on your description, this restriction does not seem reasonable and unless



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decides they should do. A Newsletter Committee, for example, should normally work directly with the property manager to produce the newsletter. A draft newsletter should be presented to the board for approval and the property manager might be charged to see that it's distributed. The Budget Committee presents a draft budget to the board for approval. The Landscape Committee typically oversees the landscape contractor and the Pool Committee oversees the pool contractor. As long as everything is going according to plan, the committee can function on its own. If there is a problem, the committee should pass the information on to the manager, the board or both, depending on the complexity.

Committees don't make policy. They carry out administrative functions approved by the board and assist the property manager in their area of focus. Since HOAs generally can't afford to have the manager do daily inspections, a committee can assist in more regular oversight and advise the manager when action is needed, as in the case of the landscape contractor.

The board should be sure each committee has a clear job description with limits of authority defined. The property manager should understand that committees are advisory only. If there is an issue that needs approval, the manager should take it to the board or board president.

Q It was discovered last year that many of our condos have defective furnaces. We required all units to have an inspection by a licensed heating professional. Many owners replaced their furnaces but we still have a number of owners who have refused to either have the furnace inspected or when it was found defective, refused to replace the furnace. The furnaces are a potential fire hazard. Do you have any suggestions?

A The HOA board has the right to demand furnace replacement where there is a documented fire safety issue. But the board can help the unit owners say "Yes" by

facilitating multiple installations by a heating contractor to obtain a discount. Each unit owner would reimburse their portion of the expense. If, however, some owners still refuse, a demand letter should be delivered to each stating that the HOA is prepared to force the issue legally. Set a deadline for compliance of, say, 30 days after which the matter will be turned over to an attorney for further action. ⚡

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Checklists
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Diamonds in the Rough

Many homeowner associations find it difficult to hold the line on expenses. Inflation erodes endlessly increasing budgets and members scream for relief. But help is on the way. There are practical ways to reduce costs without cutting services. The HOA's budget is like a collection of uncut gems of different type, size and quality. Some of them are diamonds in the rough just waiting to be set free. And like diamonds, your budget, with a bit of cut and polish, can sparkle. Here are a few examples:

Insurance. Raise the deductible and reduce the annual premium. Create a line item in your Reserve Study with a life of three years called "Insurance Deductible" equal to your deductible. If there is no claim during the three year period, the money is saved.

Pools. Check temperature and pump cycle times and adjust for savings. Swimmers may not notice a two degree drop in temperature, but lower temperatures significantly decrease the heating bill.

Lighting. Convert to high lumen-low energy lighting. The conversion expense is usually paid back within only one to two years due to reduced power and labor costs.

Distributing Information. Many meeting notices and information can be

distributed to residents by way of flyer boxes like the ones used by real estate agents. Even better, distribute information by email for nothing.

Have an HOA Website. Enjoy HUGE communication savings with your own HOA website. Post important information like the governing documents, newsletters, meeting minutes and rules. Use email for maintenance and information requests so the information is moved quickly to the right person with a date stamped record. Poll your members on important issues or proposed policies. Notify them of meetings and other events. An HOA Website is probably the best move your HOA can make to improve efficiency and reduce costs.

Preventive Maintenance. Catch problems when they are small enough to resolve cheaply by regular property checklist inspections. Of particular importance:

- **Carpet Cleaning:** Professionally clean common area carpet at least once a year to prolong its life.
- **Gutters & Downspouts:** Clean at least annually prior to winter or rainy season; clean out underground drains as needed.
- **Paint:** Use only the highest quality paint suitable for the application for maximum performance and durability.
- **Roofs:** Inspect and clean annually prior to winter or rainy season; look for obvious problems like missing shingles, breaks in the membrane; contract with a roofing contractor to perform this function automatically prior to winter.
- **Sidewalks:** Inspect annually for tripping hazards; grind down or remove and repour.
- **Trees:** Prune trees every 3-5 years to eliminate deadwood, enhance shaping and identify treatable diseases and pests.

Handyman Services. For HOAs that can't afford a full time maintenance person, contract with a licensed, bonded and insured handyman who can

perform a monthly "laundry list" of small repairs. Combine tasks to provide a full day's work.

Wood Fences. Use a stain rather than paint since stain won't peel and requires less frequent maintenance. For cedar & redwood: Leave unpainted to age naturally. No stain, paint or sealer required. Use steel pipe instead of wood fence posts that don't rot.

Paint Supplies. Discuss special pricing options with local paint supply companies. If your HOA is large enough, it may qualify for contractor pricing.

Sidewalk Repair. Use a grinding service to repair walkway uplifts and tripping hazards instead of the replacing the concrete.

Water Usage - Exterior

- Install a sprinkler system with a rain sensor to eliminate unnecessary cycles.
- Early morning sprinkling reduces water loss from evaporation.
- Adjust sprinkler heads frequently so water lands on the vegetation, not the paving.
- Plant native and drought tolerant grasses, ground covers, shrubs and trees. Group plants together based on similar water needs.

As a jeweler carefully examines and sorts his gem stock, consider the ways your homeowner association spends its money. Cut and polish those items that aren't shining like they should. If you look closely, you will indeed find diamonds in the rough.🔍

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Meet & Seat

The seating arrangement at meetings is critical to a productive outcome. Foreign diplomats are particularly careful in choosing the shape of the

table and who sits next to who since the slightest faux pas can have disastrous results. In King Arthur's day, meetings were held at a Round Table so that all could freely participate without the King dictating the debate or worse. (Swords, lances and maces were checked at the door).

There are lessons to be learned from this age-old experience that can be applied to community associations. HOAs have both Board and Annual Meetings and both formats demand very different seating considerations.

Board meetings are designed to transact regular business for the care and welfare of often millions of dollars of common assets. As such, they should be held at places and times conducive to business. Meetings held in someone's home prove challenging.

At Home Board Meetings. Considering that owners are entitled to attend board meetings (as an audience, not participants in the discussion or voting), there should be adequate seating available for them. If meetings are held in tiny quarters with room only for the board, guests are effectively shut out and the impression is that they aren't welcome. Seek the most spacious home available to accommodate both board and guests.

Avoid using living rooms except for guest seating. It's very difficult to juggle papers or take notes while sitting in a Lazy Boy. Meetings should be held at a table large enough to spread out agendas, reports and other papers without having to continually shuffle the stack. If using a kitchen table, remove everything except meeting items. Turn off cell phones during the meeting since the ringing always disrupts the discussion and pulls someone away from the business at hand.

If there is a table head, the board president should sit there and direct the meeting. The head of the table is the historical place of authority and there is no reason to buck tradition. The secretary taking minutes should sit at the opposite end of the table so all directors can be easily seen and heard.

Guests should not sit at the meeting table since this is an invitation to actively participate in the business.

Avoid the temptation to have the board face the guests as a "panel". This seating format also invites participation from the guests and makes it difficult for the board to talk amongst itself.

Formal Board Meetings. Ideally, the board should meet at a location that is designed for meetings. Basics include a large conference table, good lighting, bathrooms, temperature control and room for guests. If none exists in your association, seek out meeting rooms in area community centers, libraries and churches. They may be closer and cheaper than you think.

There are a number of advantages to moving "out of the kitchen" into a formal meeting place. The distraction potential is enormously reduced: no phones, food, TV, kids, dogs and neighbors. The business meeting takes on a true "business" nature. Folks are less likely to linger in this environment or get into protracted discussions. As with home meetings, seating should be adequate for both board and guests: board at the conference table and guests off to the side.

Annual Meetings. These meetings should be carefully choreographed. Always hold them in a formal meeting facility large enough to accommodate all owners. Owners normally sit gallery style with the board at a head table unless your group is small enough to fit around an Arthurian Round Table. Ideally, the head table should be "half moon" or "U" shape so all directors can see each other as well as the audience. Avoid having the board sit panel style unless the meeting is intended to be a question and answer session with directors on the "firing line". Make sure to have a proper sound system if the room requires it.

Meeting seating is critical when it comes to getting things accomplished efficiently. Set your sites for successful meetings and don't forget to check your swords at the door.🔍

HOA Tree-age

One of the most controversial issues that face an homeowner association is tree removal. While there are many practical reasons to remove trees, some residents take a deeply personal interest in their fate. It is the Practical versus the Emotional. Let's explore the dynamics of this phenomena.

In a new HOA, the builder often selects trees for visual appeal and rapid growth. The trees are young and occupy a relatively small area. Over time, these trees do what trees do, get bigger and denser. With size comes maintenance problems like:

1. Tree debris that clogs the gutters
2. Branches that damage roof and siding
3. Branches that obscure security lighting or vision, a safety issue
4. Overcrowding that promotes plant and tree diseases
5. Roots in the sewer lines that causes backups and flooding
6. Shading that promotes moss and algae growth
7. Tree roots that lift sidewalks or crack asphalt
8. Trees that block views

The cost of tree-age can easily get to a point where removal may need to be considered. From a strictly dollars and cents point of view, the cost to remove a tree versus ongoing maintenance costs is a no brainer. In most cases, several hundred dollars in removal cost will often save thousands of dollars in maintenance or damage. However, the politics of removal should not be ignored.

Emotions run high about tree removal and opinions often run 180 degrees apart. A resident that complains of debris in the gutters and lobbies for removal is often countered by another that loves looking at the lush foliage. And let's face it, trees don't happen overnight. There are those that feel that

killing such an enduring life form is morally wrong and that people should adapt to the changing tree environment.

An issue like this is best handled by an informed democratic process: First, hire an certified arborist to inspect and make written recommendations about the trees in question. This step is invaluable since the board now has "expert" input into the process that often offers alternatives to removal. Second, flag trees with bright surveyor tape for easy identification.

Next, send a written notice to all owners which includes the location of the trees and the reasons for removal. It's important to include all owners because tree removal is a philosophical issue that impacts more than those in the immediate vicinity of the removals. The notice should allow at least a 30 day review period during which the board accepts written comments before making a final decision. If there are numerous trees involved, it is prudent to hold a special owner meeting to discuss the issue. Let concerned owners vent. Remember, this is a hot topic.

Once the board has gathered opinions, decision time is at hand. Before moving ahead, keep in mind that many cities require removal permits. Tree companies don't always comply with the law, so check with your local City Hall before proceeding. Also, a lone dissident owner or even renter may file a complaint with the City road blocking the removal process. This doesn't necessarily kill the process but will involve another level of review that will delay it. Finally, make sure all pruning alternatives have been considered. For example, view blockage can often be cured by "window" pruning which allow the offending tree to remain.

Tree removals give the board an opportunity to show true leadership and sensitivity. Trees are one of the community's most valuable assets. A good board politician will earn a vote of confidence if this issue is handled carefully. 🌳

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Meetings
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Blue Light Special

There is a great expression for giving the customer what he wants: "If the man wants a blue suit, turn on the blue light." This wisdom is based in the curious phenomena that perception is often more important than substance. As any successful salesperson knows, the sale is in the bag if the customer thinks it's his wise decision making at work, not "being sold".

This same philosophy can assist in the recurring and vexing issue of what color to paint the buildings. There is no greater political football than paint color and every time the board members move to make a change, they usually regret it. The heated debate that ensues sends them packing back to the political fence of repainting the same color.

But there are often compelling reasons to change: Those '70s colors never worked, even in the '70s. Besides being a color consultant's worse nightmare, those dark colors absorb heat and cause premature failure of the paint. Since one thing leads to another, paint failure leads to a shabby look and premature failure of the trim and siding. And this means money. Ouch!

To dodge the politics of paint, the board should defer to a design consultant from a local paint supplier. On the premise that the homeowner association will buy its paint, most companies will provide consulting services for nothing, zero, zip (a very good price). Ask the consultant to recommend three contemporary body and trim color combinations suitable for your buildings. Ask also for recommendations of how trim should be painted for a contemporary look. The painted trim combinations of yore are often glaringly old fashioned and detract from value. A new trim look with cutting edge colors can fast forward the curb appeal.

Have the consultant prepare these trim style and color recommendations in a side by side color board and hang the board on a sunny building wall so that residents can see what the "experts" recommend. Have them vote on the combination they prefer. Majority wins.

If your project is large enough to justify a number of different color schemes, let the residents of each building decide which color combination they want for their building. Again majority wins.

Using an outside color consultant removes this political football from the board's hands and helps keep the peace. Letting the residents choose gets them invested in the result. Remember the Blue Light Special. It works. 🗳️

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Ending the Charade

Charades is an old party game where one person tries to convey the name of something (an object, person, book title, song title, etc.) to the others by means of pantomime. While entertaining to the participants, a charade is a shallow imitation, a phony.

Sometimes we play out a type of charade in our daily lives. We say "yes" to others because we want to please them or avoid confrontation. We cave in to the telemarketer selling something we don't need or a cause we don't support. Then we hate ourselves for doing it because it's phony.

So how can you deal with the temptation to "go with the flow" and "ride with the tide"? Here are a few suggestions:

Admit Your Limitations. Rather than be average at many things, excel at a few by staying focused.

Saying No Builds Respect. Pushovers command little respect.

Be Polite, but Firm. Avoid being
The Regenesiis Report

wishy-washy. Make your yes mean yes and your no mean no.

Stand Your Ground. When pressed to take on more work, admit you already have your hands full and need to devote your full attention to what you already have before you.

Offer Alternatives. Say "maybe" by offering alternatives to the person who is asking. ("I can't do it now, but how about next week?")

When You Have to Say Yes. Sometimes, saying no is not possible. Instead:

- Say you agree *just this once*. This closes the door to ongoing obligations.
- Say yes, but remind them they owe you one. This makes the matter a trade.
- Say yes, but dictate the time table. "I can do it but not until next Tuesday."
- Limit your availability. "I can only spare two hours."

End the charade in your life and watch your self respect grow. God has a purpose for you that is waiting to fill the void with real joy. 🗳️

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Heart Mechanic

A mechanic was removing a cylinder head from the motor of a motorcycle when he spotted a well known heart surgeon in his shop waiting for the service manager.

The mechanic shouts across the garage, "Hey Doc, can I ask you a question?"

The surgeon, a bit surprised, walks over

to the mechanic and says, "How can I help you?"

The mechanic wipes his hands on a rag and asks, "Doc, look at this engine. I open it up, take valves out, fix 'em, put 'em back in and when I finish, it works just like new. So how come I get such a small salary and you get the really big bucks, when you and I are doing basically the same work?"

The surgeon paused, smiled and responded, "Try doing it with the engine running!" 🗳️

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