



## **#304 HOA Homefront – New Year’s Resolutions Part III - The Manager**

By Kelly G. Richardson, Esq. CCAL

*Note to readers – After the previous two columns proposing resolutions for directors and HOA members, here are ideas for managers. Next week - service providers.*

### **As the association’s professional manager, I resolve to:**

#### **NUMBER ONE:**

- Follow the Golden Rule.

#### **ATTITUDE CHECK:**

- Remember I am a professional and will give the board the best advice I can. I am not employed to be silent.
- Strive to give the board the answers it needs to hear, regardless if it is the answer the board hopes for.
- Avoid reacting defensively to upset homeowners and will make sure they are informed as to the “whats” but also the “whys.”
- If the board disregards my advice, I will document it in writing to the board.
- Not attempt to give specialized advice but will refer the board to the appropriate specialized professional.
- Try to please all, while knowing that I can’t.

#### **BE KNOWLEDGEABLE:**

- Pursue professional designations and attend seminars to keep me up to date.
- Be prepared at any board meeting to explain significant deviations from budget.
- Understand the Business Judgment Rule, and confirm the board has sufficient information to make each decision.
- Encourage my board members to join the Community Associations Institute, knowing educated boards are better boards.

#### **BETTER BOARD MEETINGS:**

- Protect the board from overly long or disorganized meetings.
- Create agendas with consent calendars to quickly handle non-controversial items.
- Alert the board when an agenda is too ambitious.
- Become comfortable with the fundamentals of Roberts Rules of Order.
- Help the board stay on topic and on agenda.

- Alert the board if it is handling matters in closed session which should be in open session.
- Bring the HOA governing documents, including all rules, to every meeting.
- On each agenda item, be prepared to provide a recommendation or recommend retention of appropriate specialized expertise.
- When homeowners in open forum criticize my work, I will listen respectfully.

#### COMMUNITY BUILDING:

- Work to increase meaningful and frequent communication with the members.
- While advising the board and carrying out its instructions, I will focus on the association's community needs as well as its financial, maintenance and legal concerns.

#### ETHICS:

- Treat all members the same, regardless of how they treat me.
- When answering a question from a director, or giving a report, I will communicate to the entire board.
- Remember my client is the HOA, not its board or president.
- Will not take sides in elections or recalls, nor assist or advocate for or against any candidate. My opinions will remain secret.
- Will reject vendors offering kickbacks, gratuities or commissions, and will promptly disclose such offers to the board.
- Will not give a company related to my employer any advantage in bidding on HOA contracts.

#### VENDORS:

- Advise the board when specialized expertise is needed.
- Will not only recommend one favored vendor but will provide my board with two or three candidates to consider.
- Before the board evaluates major or complicated bids, I will suggest a consultant to help the board select the best and most complete proposal.
- Will recommend the best bid, not simply the cheapest.

#### LAST:

- Follow the Golden Rule.

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