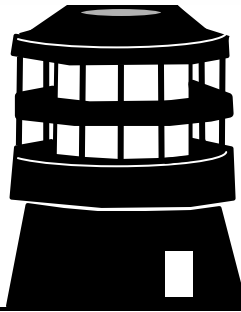

THE Board Beacon

“Exclusively for those who serve the community”



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HOUSTON COMMUNITY MANAGEMENT SERVICES

18333 Egret Bay Blvds., Suite 445

Houston, TX 77058

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We welcome your questions, comments or story ideas.

Office: (281) 333-5173

Toll Free: (800) 568-6807

Fax: (281) 333-4475

E-mail: info@houcomm.com

EDITOR

LEJEAN GRIFFITH, CMCA, AMS

ASSISTANT EDITOR

SHANNON LONG, CMCA, AMS

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Transitioning to a New Manager

Every Management Company eventually comes face to face with the need to change the community portfolio manager. The actions taken by Management Company officials and Boards in managing the change process can play a critical role in how effective and successful the transition is.

We all are confronted with the situation where a Board, for whatever reason, decides its community manager is not doing the job to its satisfaction and consequently request a change be made. Even managers who have previously been superior managers may not be the right manager for that association today.

Lots of things can contribute to this situation: board personalities change, the needs of the community change, expectations change, skill requirements change, ---- and for whatever reason and nobody's fault, the manager may simply not be a good "fit".

The decision to change is sometimes initiated by the management company itself due to internal staffing issues such as the resignation of a community manager or a request on the part of the manager for a reassignment due to circumstances affecting the community manager. The personal life of the manager may have changed, and in some instances job boredom may be a factor although in the majority of cases it is the issue of "burnout" on the part of a manager who has simply had a stress overload for too long and decided on a career change or reassignment. The reality of too many nightly Board meetings and a high-pressure action agenda in a large portfolio can become too much for even superior managers and change is sometimes called for.

We will deal here with the circumstances where the management company is the one to initiate the change.

All parties can benefit from an orderly process to follow in achieving a successful transition to a new manager. The following tips may be of help in orchestrating that process.

Start with making sure that all parties are clear on the reasons surrounding the assignment of a new manager. If it stems from Board dissatisfaction with the performance of the manager, try to identify and articulate the specific areas of dissatisfaction so that the management company and the replacement manager can address them up front. If it is due to changes within the management company or due to underlying personnel issues, be as candid as possible with the community Board.

It is important to plan for an orderly transition and to successfully manage the selection of the right candidate to replace a departing manager. Careful attention must be paid to identifying the job skills and right personality for the job and then identifying that individual.

Continued on page 2



WELCOME ABOARD

NEW CLIENT COMMUNITIES

Villages of Deer Park

Cypress Village

Villages at Mary's Creek

Nassau Bay Townhomes On The Park

NEW EMPLOYEES

Harry Anthony

Jamie Comstock

Glenna Hubert

Carolyn Pope

Anthony Snyder

Donna Sutherland

Jennifer Walker

EMPLOYEE OF THE MONTH

The HCMS Morale Committee has implemented an "Employee of the Month" program. Employees are nominated by their fellow workers based on criteria including their willingness to assist others in a time of need and going above and beyond their duties. The Executive team chooses the winner from the top 3 nominees for the month. Each winner receives 2 tickets to a sporting event (seasonal), a gift certificate to a local restaurant and a half a day off on a Friday of their choice during the month. Past winners include:

Cheryl Copeland – July

Darlene Ingle - August

Barbara Haynes - September

Debbie Hassle – October

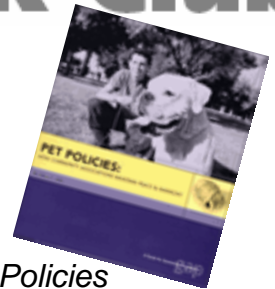
Lisa Mushinski – November

HCMS Book Club

Pet Policies

How Community Associations Maintain Peace & Harmony

By: Debra H. Lewin



Just released! The new edition of *Pet Policies* contains practical new information on the most aggravating of pet problems—unscooped poop. Full of practical suggestions and helpful alternatives to all your pet problems.

Available www.caionline.org/bookstore

Transitioning to a New Manager Continued

Once you've identified the replacement manager it is important to begin with an orientation of the new manager. When you provide a newly assigned manager with an orientation, you give him or her the basic rules and objectives of the new assignment as well as information on tools and resources they can use to succeed. For example, a few specific items include:

- Expectations the management company and the board have of them in their new role
- Where and how to gain access to reports, people and information needed to do the new job
- Insight to the new manager about potential obstacles that may get in the way of peak performance

The orientation process is absolutely critical to the success process.

The new manager needs as early as possible a clear understanding of the issues confronting the affected community. If at all possible an exit report should be prepared by the departing manager setting forth the current management issues and challenges facing the property along with any major deadlines coming up. The exiting manager and existing staff, if any, should be asked to update a "to-do" list of their current major activities over the past month, planned activities over the coming two months and any major issues they're having now. These to-do lists will serve to coordinate the work details during the transition, help to update the new manager, and orient him or her. If delays are anticipated as a result of the management change, it will be important to communicate this immediately in the transition meeting to be held with the board.

In the ideal situation, it will be possible to have transition overlap between the departing manager and the incoming manager. Hopefully this can be arranged to include attendance at one (or more) board meeting together.

The new manager will obviously need to come up to speed on the new community as rapidly as possible and the extent to which a clear picture is obtained from the exiting manager or the management company can determine success or failure with the transition. Make sure that the new manager reviews the association documents, by-laws, Board minutes for the past year,

Continued on page 3

budget, current financials, most recent reserve study, recent management reports and the administrative calendar. Physically tour the community, with the exiting manager if at all possible, so as to see the community through that manager's eyes.

One issue where site staff are involved that will require early attention and decision is to determine what to say to staff, who should inform them about the change, and when and what to discuss in terms of expectations on job performance on the part of staff during transition. The staff should be assured that the transition is being planned and carried out. The plan might be reviewed in the staff meeting.

If at all possible, the departing community manager should complete performance reviews on all personnel before he/she leaves. This ensures that the manager's important feedback to personnel is collected before he/she goes, gives personnel a fair opportunity to reflect their past performance to the new manager, and gives the new manager the input he/she deserves about each employee to ensure effective supervision.

Once the replacement decision has been made, notification to the Board of the upcoming change and how you handle that notification are equally critical. The Board should be apprised as soon as possible. If at all possible, the management company should have the replacement manager identified before Board notification and thus be able to state with confidence the background, skills and abilities that the new manager will bring to the table. If that is not possible then make sure to reassure the Board of your search for the candidate that can be a GREAT manager for their community.

Recommended notification is a personal telephone call from senior company management to the Board president to discuss the upcoming change, the new manager selected, and the arrangement of an appropriate venue for introduction of the manager to the Board president. At this subsequent meeting, the details of the transition can be worked out and agreed upon. It is also a great opportunity for the new manager to shine by showing an early grasp of the issues on the property and that manager's readiness and ability to tackle them. It is important to specifically discuss with the President his agenda, his sense of community priorities, to learn his expectations, and to lay the coordination groundwork with this obvious key player.

At the meeting with the Board president, be sure to discuss how to handle notifying the Board and the issue of public relations with the community. An early meeting with the Board should ensue. The community will soon hear that the current manager is leaving or has left. Agree on how this message will be conveyed to the community. It is recommended that a letter be sent to the owners notifying them of the transition and assuring them that the transition planning is being carried out thoroughly. The letter would announce the new person, when they are starting, something about their background, etc. Ask these same owners to contact the board chair if they have concerns or questions. To be effective, communication must be timely and succinct.

Thought should also be given to possibly having a notification letter come from the senior management company official briefing the Board President and to the rest of the Board notifying them of the upcoming change and indicating an early meeting with the Board to discuss the transition. Following the meeting with the Board president, the next major milestone is to arrange the executive session meeting with the Board itself where the new manager is introduced and where an in-depth discussion can transpire between the new manager and the Board. Members of the Board need to clearly communicate their expectations of management and the new manager.

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Associa Newsletters

Your associations can now receive a professionally prepared COLOR newsletter with Associa Living advertisements at no additional cost above your local office cost for black and white copies!

Send us your unformatted, plain text content ... in 3-4 days, we will send you a color PDF (read-only) to review and approve. When you say you are ready, we will print it!

Whether the association has 50 or 1,050 units/lots/homes, Associa will ship the completed COLOR newsletters to the local office for processing! The association will still be responsible for the costs of mailing the newsletter to owners.

Staff Achievements

Congratulations...

Manager **Barbara Scott** for earning the CMCA (Certified Manager of Community Associations) designation from Community Association Institute (CAI).

Service Anniversary Awards...

Rhonda Major and Diana Shivers – 23

Minelma Bonar – 14

Betty Baker-Oshi and Liz MacNutt – 9

George Jarnigan – 8

LeJean Griffith and Jason Woodhouse – 7

Shannon Long – 6

Tim Bass, Daniel Kimbrough and Beverly McCoy – 5

Joanne Allen, Tracy Amundson, Amberly Garrison and Jennifer Wood – 4

Gina Craig, Ben Franklin, Monica Lowth, Martha Marsters and Patty Merritt – 3

Julia Cover, Darlene Ingle and Lari Williams – 2

Thomas Bailey, Jenny Flippen, Debbie Newnam, Nancy Orso, Heather Reed and Lucia Zuniga - 1

Transition to a New Manager

Continued

A failure to have and agree upon mutual expectations can lead to uncertainty and frustration on everyone's part.

It will be useful for the new manager to communicate to the Board his newly obtained insight into the community and the issues it faces as well as being prepared to discuss how he intends to tackle the job and work with the Board. An early task is to agree upon a list of priorities to be addressed by the new manager and the establishment of a timetable in which to address the specific items. What the Board wants to come away from that meeting with is that the association affairs are still in good hands, that a well thought out process is in place for the transition, and that the transition can be expected to go well.

The final ingredient for this recipe for success is for the new manager to become engaged early and often. Especially important is to focus on frequent communication with the Board President and Board in general on issues, actions being taken, etc. to reinforce the perception that the manager is on top of the affairs of the community. E-mail and fax memos can be most helpful here. Scheduling a number of progress meetings with the Board president can also be helpful.

At the end of 60 days, the new manager should have a second executive session meeting with the Board. Discussion should include specifically how the transition is progressing and to afford a structured feedback opportunity to make any needed mid-course corrections in management activities. Taken collectively, these actions are certain to keep the association on course! *Article courtesy of George Gardner, CMCA® Vice President and Director of the Condominium Division, Community Management Corporation, Fairfax , VA*

Community Websites

You don't have to be dependent on volunteers who may move away. Your website will be actively managed by HCMS. We make available to each of our associations a personalized website that allows your association's residents access to a wealth of online services, including a community calendar, private board and committee discussion groups, access to association documents and much, much more. Open up a new form of communication with your members. Residents can get involved at any time and on their own schedule. Catch up on news & announcements, meeting minutes, and share ideas. A Community website is a valuable asset for your association.

Associa ... The Leader in Community Association Management

Web Site: www.houcomm.com

Fax: (281) 333-4475

Phone: (281) 333-5173

Houston, TX 77058

18333 Egret Bay Blvd., Suite 445

Houston Community Management Services

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