

Vol. 33 • No. 2 • Feb 2015



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President's Message

**"I am a big believer
in transparency and
communication. As such,
I pledge to provide updates
on the activities of
the Board throughout
the year in our
monthly magazine."**



CARMEN STEFU
President
CAI-RMC

Happy February to you all!
As I write this article, the Board of Directors has had its first Board meeting of the year. I am very excited about the activities that the Board will be undertaking this year and look forward to great results!

I am a big believer in transparency and communication. As such, I pledge to provide updates on the activities of the Board throughout the year in our monthly magazine.

To begin with, the Board and a number of committee Chairs and members met on January 9th for a full day strategic session. The 2015 strategic plan was just adopted by the Board at the January Board meeting. A copy of the plan will be posted on the Chapter's website for review by any member of our organization. We hope that you will take a few minutes to review the plan as it is an important tool in our Chapter's success! If you have any questions related to the plan, please do not hesitate to contact myself or any other Board member.

Secondly, another activity that a committee of the Board has undertaken is to solicit proposals and select our new Management Company and Executive Director. The committee and Board will conduct interviews in early February and we will announce the new management team in our March issue or earlier via e-mail communication if possible.

Lastly, please be on the lookout for information from the Chapter related to classes and preparations for the Manager Licensing requirements. This information will most likely be e-mailed to the members, therefore if you have not yet registered your e-mail with the Chapter, please do so now in order to receive all communication from the Chapter.

Thank you and I look forward to providing more updates in the future! 🏠

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Committee Corner



EDITORIAL COMMITTEE

With the redesign of the Common Interest magazine the Editorial committee is off to a great start! In the strategy meeting we held in December we identified several broad topics for the year. The topic for our next issue is “Ready, Set, Go”. Articles in this issue will focus on RFP preparation, proposals, how to review proposals and how to select contractors. We are always looking for contributions to the magazine; please contact a committee member if you have an idea for an article or if you’d like to write one.



PROGRAMS & EDUCATION COMMITTEE

The Programs and Education Committee had a successful start to the new year with two Legislative Update Lunch and Learns: a sold out show in Denver, and another well attended program in Fort Collins. With Manager Licensing right around the corner, we have a fun and interactive “Pass the Quiz Bowl” Lunch and Learn planned for both Denver on Tuesday, February 17th and Fort Collins on Wednesday, February 18th. For updates from CAI via email and on their website to register. If you are interested in learning more about the Programs and Education Committee, please call our Chair, Melissa Keithly at (303)233-4646 or Vice-Chair Jenna Codespoti Wright (303)547-7848. Our next committee meeting will be held on February 3rd at 12:00pm.



MARKETING & MEDIA COMMITTEE

As usual, the Marketing & Media Committee is up to all sorts of projects. This year we are looking for charities to support, revamping our media outreach efforts, and working hard to synchronize with the other committees to make the industry stronger and more informed. To those ends, we have updated our contract with Sigler Communications and assigned point people to all RMC events. We are always seeking volunteers who are motivated to learn more about CAI RMC and get involved! Stay tuned or join us to see what else we’re up to!



MEMBERSHIP COMMITTEE

During the January membership meeting the committee reviewed the committee mission statement which many of the members had input on. The dates were tentatively set for two membership mixers, one in the spring and the other in the fall, so keep a look out for the events on the calendar. The committee also reviewed the CAI Board strategic planning session that was held on January 9th.



HOA COUNCIL

The HOA Council is planning on five HOA Roundtables this year and will kick off our calendar with our second roundtable in LoDo at the Metro Chamber of Commerce on Feb. 24th. We will again host our event at the City of Aurora on April 22. This has traditionally been our largest event with over 60 HOA Board members and residents in attendance. Our next scheduled roundtable will be on September 17th in Centennial which is becoming a very well-attended session. We are still working on scheduling roundtables in Thornton (last year was our first for that locale) and Ft. Collins. Our committee meets the third Wednesday of the month at the offices of Moeller Graf in the Denver Tech Center. We welcome new members!



ACTIVITIES COMMITTEE

Though there is snow on the ground the Golf and Activity Committee is hard at work on events for 2015. Please save the following dates.

Spring Fling – Monday May 4, 2015 at the Pinehurst Country Club

This event will give members an opportunity to fine tune their golf games and network with our membership at an exclusive private course. The format for this event will be to play your own ball and most importantly, have fun! Members will have the opportunity to sign up as a single player or purchase a foursome.

CAI Golf Tournament – Monday June 29, 2015 at the Pinery Country Club

The goal of the tournament is get Property Managers, HOA Members, and Vendors together for a day of fun on the course. We are encouraging you to reach out to all CAI members that may have never had a chance to participate in past events to do so this year.



MOUNTAIN CONFERENCE COMMITTEE

The Mountain Conference Committee will be making a decision on a venue for this year's Conference sometime in the next 2 weeks. We are down to 3 possible venues: Copper Mountain Resort, Vail Marriott and the Hyatt at Beaver Creek. We will inform the Board and Chapter as soon as a decision has been made. We are presently reviewing the proposals from all 3 properties. We already have a number of Sponsors signed up which is very exciting news. We hope for a record attendance this year and we are going to tap into a few more mountain managers this year for topics for the educational programs. We want to make sure we continue to meet and even exceed the expectations of our attendees and keep our business partner vendors happy with a record turnout.




FALL CONFERENCE COMMITTEE

Our January meeting was a recap of last year's fall conference. Bryan Farley from Association Reserves Colorado is the new co-chair and Emily Tucker from Palace Construction is this year's Secretary. Our next meeting will be held Feb. 17, 8:30-9:30am at Palace Construction's office at 7 South Galapago St., Denver, CO.

by Brandon J. Helm, CMCA, AMS, PCAM,
CLAC Communications Liaison

Ladies and Gentlemen: START YOUR ENGINES!! At the time of writing this (January 15), we are just 7 days into the 2015 Colorado General Assembly and have already seen a half dozen bills introduced which affect community associations!! So while CLAC had one of its busiest off-seasons, it appears that we're going to need to use that momentum to propel us into what is shaping up to be a fiercely busy legislative session. Here's a peek into the significant items that CLAC is working on and that you should be aware of.



“While CLAC had one of its busiest off-seasons, it appears that we’re going to need to use that momentum to propel us into what is shaping up to be a fiercely busy legislative session.”

Manager Licensing Rulemaking

On January 2, DORA, alongside the Division of Real Estate, held an emergency rulemaking session to take comments on the draft of the A RULES (Qualifications, Application & Examinations), C RULES (Association Management Offices) and D RULES (Renewal, Transfer, Inactive License, Reinstatement and Insurance). We have published these rules here, in their entirety. If there is ever a time for you to educate yourself about these rules, the time is NOW.

CLAC and its Manager Licensing Taskforce recognize that a bill to cleanup a number of key items regarding this matter is imperative. It is currently one of our top priorities and one which you may have more information about even before this article is published.

SB15-1040

This bill is a response to the manager licensing bill that became effective January 1, 2015. This bill attempts to:

- Redefine “common interest community” to exclude the following communities:
 - Communities with fewer than 200 units
 - Those containing only units restricted to nonresidential use
 - Those containing only time-share units

- Redefine “community association manager” by extending the number of duties a person would have to perform (changes it from 1 to 4) before being considered a manager who requires a license.
- Strip the requirement that the CEO or executives with oversight and supervision of individuals engaging in community association management practices also hold a license.
- Redefine who needs to be licensed by stating that if more than one person manages a single common interest community, then only one of those individuals would be required to obtain a license.

POSITION TAKEN: CLAC has taken the position that it opposes this bill in its entirety.

SB15-079

This bill was introduced by Senator Ulibarri who sponsored SB220-the construction defect bill that CLAC worked tirelessly to defeat at the end of the 2014 Session. The Senator has pivoted this year and is trying to find other ways to incentivize the construction of affordable housing. To accomplish this, this bill proposes:

- The establishment of a statewide affordable housing investment fund
- An increase of \$2 for every document recorded in Colorado
- County Clerks keep \$1 of the increase to defray the costs associated with their electronic filing system
- Credit of the remaining \$1 to the affordable house investment fund

POSITION TAKEN: The content of this bill is currently being reviewed and considered. CLAC has not yet taken a formal position.

SB15-091

The bill reduces the maximum statutory limitation period for an action against an architect, contractor, builder or builder vendor, engineer, or inspector performing or furnishing the design, planning, supervision, inspection, construction, or observation of construction of any improvement to real property from 8 years to 4 years.

POSITION TAKEN: CLAC has taken the position that it opposes this bill in its entirety. 🏠

If you would like to stay abreast of legislative activity visit <http://www.cai-rmc.org/> and click on “Legislation”. CLAC will also send a call to action email should any issues arise that require your immediate attention and/or response.

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Time Management

Most people seem to run out of time and never have enough time to do everything they want to accomplish. Here are a few ideas to help fine tune your time-management skills.

1. Make a to-do-list

Identify a handful of areas of your personal and work life that are important at any given time, and use those as guiding markers to create your task lists. Each night make a to-do list of all your unfinished business and projects towards those ends. Review the list, prioritize and decide how much time you need to get each activity done.

2. Prioritize

Focus. 80 percent of your accomplishments come from 20 percent of your efforts. So think strategically: What 20 percent of your work is the most valuable—to you and to your employer? Once you've identified it, try to focus the lion's share of your time and energy in that direction. Learn to say "no" to non-essential demands. And don't waste time perfecting every interoffice memo when you could spend the time more profitably on something else.

3. Delegate

Pass projects on to subordinates at work, recruit your children to help with household chores and hire a gardener or local teenager to maintain your lawn. One way to think about it is "don't do what you can do, do what only you can do".

4. Set Deadlines for Major Projects

Then focus only on starting to work on them—not finishing them. Instead of procrastinating, divide large projects into manageable pieces and attack only one piece at a time. Realize that many people who have trouble meeting deadlines have the unrealistic idea that their work should be perfect. Expect quality rather than perfection. Another mantra here when it comes to making progress on project milestones is, "Don't make perfect the enemy of the good."

5. Schedule Concentration Time

Block out some time every day when you can't be disturbed except in an emergency. Use that time to get the most important tasks of the day done. If someone stops by your desk and asks for a moment of your time, you can honestly and politely reply, "No, I'm in the middle of something right now, and I can't give you my full attention, but I can schedule time to discuss this with you later." Close the door to your office if you can when looking to power-focus.

6. Organize Throughout the Day

Remember this rule: Tuck it, transfer it or trash it. Quickly glance over every piece of mail and every memo or e-mail message you get. If it looks as if it's potentially important, file it right away in a folder

marked "pending" or delegate it to someone else to take care of. If it's not relevant or it's something you'll never look at again, trash it. Handle your mail and email, the same way at home.

7. Schedule Phone Time

Make and return most phone calls at a set time. Set aside a portion of your day, perhaps a half hour in the late afternoon, as telephone time. Let people know that this is the best time to reach you by phone and that it's when you're most likely to return calls. People will come to expect to hear from you at certain times and won't bother you as much during the rest of the day. You can also invite people to schedule times for phone calls with you by email, and get those calls done in blocks to be more efficient and keep the conversations focused as you move from call to call.

8. Be Social at Work

Chitchat can be very important because it builds relationships and helps you stay plugged in to the office grapevine. Share a joke, anecdote or personal story while standing at the photocopier or waiting for a meeting to start. Schedule a coffee break with an office buddy. Also consider joining your office softball team or helping organize the annual toy drive or basketball pool. These relationships can be invaluable to you in so many tangible and intangible ways, especially when you maintain a good flow of give and take with those in your community.

9. Stay Flexible

All your careful planning will be of little use if you assume that you can't veer from the schedule you set. You may have to spend some time handling crisis and putting out fires. Or you may get on a roll with a proposal you're writing, in which case it would be a mistake to stop just because you only scheduled an hour for it. Instead, practice effective procrastination. In other words, ask yourself, "Is putting off my next scheduled task and continuing what I'm doing an intelligent decision, or is it just a delay tactic?" It is okay to give yourself grace when you need it as long as what comes next gets its due time. Again, this goes back to staying on track with your main intentions over time yet allowing yourself to be completely present to where your attention is best put in any given moment.

10. Plan Ahead

Start your workday right—at home the night before. After dinner, pack your lunch for the next day, while you're already in the kitchen. Lay out the kids' clothes and your own and pack your briefcase. Then spend a pressure-free hour or more doing things you enjoy before bedtime. The more you are able to set intentions and make general plans your year, quarter, month and week, and day, the more you are less likely to make progress in realizing your biggest goals and feel good about making the most effective use of your work time and play time. ⬆





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Neighborhood Watch

You and your neighbors can learn to better protect yourself, your family, and your property. Broomfield has created “Neighborhood Watch”, which is a community network that enlists the active participation of citizens in cooperation with public safety agencies to prepare for “all hazards” in their communities.

What does it involve?

- Neighbors getting to know each other and working together;
- Getting to know your neighbors’ special skills (medical, technical);
- Citizens being trained to recognize and report suspicious activities;
- Implementation of overall home safety crime prevention techniques;
- Training in emergency preparedness, mitigation, and response to man-made or natural disasters.

Where do I start?

- Talk to your neighbors to get them interested;
- Contact the Broomfield Police Department’s Public Education Coordinator at 720.887.2084 to find out about a program for your area;
- Identify a “Block Captain” with your neighbors.

Rebates for Water Efficiency

The City and County of Broomfield offers two water conservation programs.

1. Water audits to identify indoor water use habits and provide tips to reduce water use and save money!
2. Rebates to help offset the cost to replace inefficient clothes washers, toilets, and sprinklers with new, water-efficient fixtures.

You or your business may qualify for rebates if you receive treated water from the City and County of Broomfield. Audits and rebates are available for residential, commercial, and industrial water customers.

Sign up for emergency alerts at www.broomfield.org/list.aspx ↑

DID YOU KNOW???

Did you know that the Broomfield Police Department offers a “Lock Box” program for seniors? The program provides a combination lockbox to put a house key inside of and secure to your home (make sure you get permission from your HOA if you live in anything other than a single family home). The combination to the lock is kept on file at the Police Department and they may use it in case of an emergency (if you’re in need of police or medical personnel to enter your home). If you’d like more information, contact Tonya Miller at 303-438-6480.

CAI Social Media Roundup

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Cynthia Gould
Sterling Hurst—Lake View Estates Venture Homeowners Association
Elliot Lawrence—Timbers Hospitality Services, LLC
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Leanne Shaw—Copper Association Management
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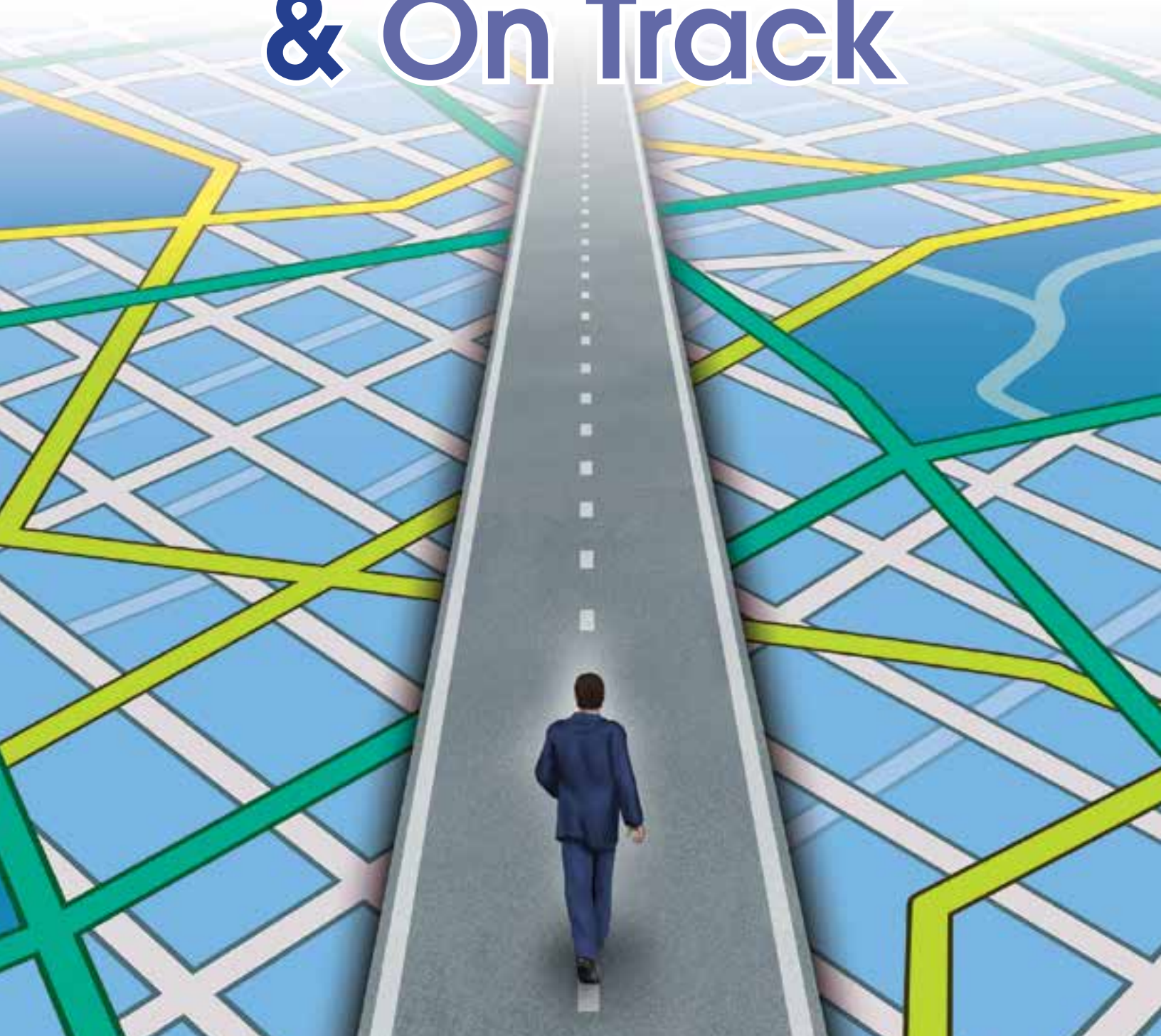
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2015 CAI-RMC Strategic Plan: Keeping the Chapter Focused & On Track



Did you know that the activities and priorities of CAI-RMC are guided by a carefully crafted Strategic & Business Plan that is updated every year? The strategic planning process is an important opportunity for the association leadership to think about the needs of members and ensure that our programs and services provide value to current and prospective members.

Research into member satisfaction and their needs as well as a review of the Chapter's strengths, weaknesses, opportunities, and threats (SWOT) drives the strategic planning process. In planning for 2015, the CAI-RMC Board and Committee Chairs met on January 9th to consider the results of two member surveys, two focus groups, multiple interviews with stakeholders, an updated SWOT analysis, and key accomplishments in 2014.

The Chapter's strategic plan starts with a "helicopter view" (the vision), looking at where we want to be in 3-5 years. The rest of the plan focuses on how to achieve the vision through eight specific Key Result Areas (KRAs): Volunteers; Members; Programs, Education & Events; Advocacy; Marketing & Communications; Partners; Governance; and Finance. For each KRA, we have assigned a brief definition of what success looks like in that area and how we will measure our performance.

Strategies and Actions are then identified for each KRA. The Actions are where the rubber really hits the road—after all, nothing happens until someone actually does something! Target deadlines are established, and each Action is allocated to someone who is accountable for ensuring it gets completed.

Studies show that the most effective strategic plans result from input by a diverse group of people. The Chapter's annual strategic planning workshop is a collaborative, interactive process that allows for maximum participation by the Board and Committee Chairs. All are given the opportunity to highlight prior year achievements, respond to research findings, and brainstorm priorities for the year ahead. Each participant is given colored stickers used to "vote" for those Actions they feel are represent the highest priorities for the upcoming year. Following the workshop, a draft plan is prepared for review and approval by the Board.

So, are we on track?

Yes, we are! Program participation, the number of new members, and Chapter recertification are some of the 2014 targets achieved or exceeded. And numerous accomplishments approved

in our strategic plans over the past two years have enhanced communications, governance, programs, volunteer support, and member satisfaction. A few examples include:

- Approved plan to reduce the size of the Board from 15 to 9 over three years
- Planned volunteer recognition event during National Volunteer Week
- Designed & implemented member satisfaction survey
- Scheduled quarterly meetings with Board/Committee Chairs
- Reviewed & updated Committee Charters
- Expanded role of Golf Committee to Activities Committee
- And more!


What's in it for me?

Having an effective plan helps foster a shared vision, provide a common understanding of our purpose (mission), minimize opportunities for individual agendas, and simplify the transition to new Board members/officers from year to year. Perhaps most importantly, the plan provides a framework that drives sound decision-making and enables the Board to say "no" to things that don't contribute to achieving the plan. Of course, a good plan needs to be flexible so the Board can respond to changing circumstances. To that end, our plan is regularly reviewed by the Board with the aim to remove, revise or recommit to the original Actions.

Without a plan, it's easy for the Board to get caught up with what's urgent, rather than what's important, and decision-making can be more "by the seat of the pants." Strategic planning has enabled the Board to clearly envision its future and intentionally map out the steps to get there—by design, rather than by default.

Leonardo da Vinci said, "Simplicity is the ultimate sophistication." In 2013, CAI-RMC chose the simple but sophisticated One Page Plan for its strategic framework. This simple, clear, compelling plan helps the Chapter stay focused on what is most important, effectively allocate time and resources, and provide clear direction for management and volunteers.

The next step in the Chapter's annual planning process is for the Board to review the draft 2015 Strategic & Business Plan at its January meeting. Final edits will be incorporated into the plan for formal adoption by the Board. Then... we hit the ground running for 2015! ⬆



**"The Chapter's annual strategic planning workshop
is a collaborative, interactive process that allows for
maximum participation by the Board and Committee Chairs."**

Pencils Down

*by Michael J. Lowder, Esq.
Benson, Kerrane, Storz & Nelson, P.C.*



“As the exam approaches, plan out the logistics of the exam day. Where will the exam be held? How will you get to the exam site? What will traffic be like on the way to the exam site? Parking? What do you need to bring to the exam on test day? What home, work, or personal responsibilities will you need to take care of on the day of the test?”

With House Bill 1277 taking effect this year, community managers throughout Colorado are finding themselves getting ready for a new kind of test—the community manager licensing test. For many managers, this will be the first time they have taken a test since high school or college, and for some, the prospect of the test is quite daunting.

As an attorney, I have gone through a number of tests in my career—college entrance exams, the law school admissions exam, lengthy law school exams, and finally, the dreaded bar examination—and I survived! With preparation and cool head, community managers taking the manager licensing exam will do the same.

Make Your Study Plan in Advance

This is one area where many test-takers struggle because it requires advance planning and scheduling. However, making a study plan is crucial. From the beginning, it is essential to get a full understanding of all the topics that the exam will cover and plan how you will study for each of the subjects that you need to study. By breaking the subjects and the exam down into manageable chunks, the study process will seem more manageable and less daunting. Much like the community manager licensing test, the bar examination covered a wide variety of topics in the law. When preparing for the bar exam, I took my two-month study period and broke it down to study 1-2 topics daily, with a rotation so that I ended up studying each topic twice or three times before the exam. This schedule made the study process much less overwhelming and helped me to take it one day at a time. Similarly, community managers can break the topics that



How to Prepare for a Big Test

the community manager licensure exam covers down, so that they can study one or two topics on each study day as they prepare to take the exam.

Study Using Methods That Cater to Your Learning Style

It has been well-established that each person learns in different ways. There are generally three different types of learners: (1) auditory, (2) visual, and (3) kinesthetic (touch). Whether you learn best by listening to audio lectures, by looking at visual aids and diagrams, or by sitting and acting out the topic or participating in an activity, figure out which type of learner you are. Once you have figured out what type of learner you are, incorporate that into your study plan.

Plan & De-Stress as the Exam Approaches

As the exam approaches, plan out the logistics of the exam day. Where will the exam be held? How will you get to the exam site? What will traffic be like on the way to the exam site? Parking? What do you need to bring to the exam on test day? What home, work, or personal responsibilities will you need to take care of on the day of the test? These are all questions that you should consider well before the examination. By considering and taking care of these items in advance, you will reduce your stress level leading up to the exam. When I took the bar examination, I planned out my route to and from the testing center well in advance, and one week before the date of the exam, I got up and got ready for the exam as if it were happening that day. Then I drove up to the testing center to gauge traffic and parking.

Going through this exercise substantially reduced my stress about traffic, parking, and the other logistical components of the exam day.

Get Enough Rest and Eat “Brain Foods” Before Your Exam

Finally, when the exam day comes, finish your preparation strong. Don't study or cram at the last minute. If you haven't learned the information by then, you won't learn and remember it in the hour before the exam. Get a good night's rest the night before the exam, and do not to change your routine—go to bed at the same time, use the same alarm clock, and don't change your morning routine. Make sure to eat a nutritious and healthy breakfast and meals throughout the day. It's important to focus on protein-rich foods on the day of an exam, such as eggs, oatmeal, nuts, and yogurt. It's also best to avoid sugar-rich foods, energy drinks, and carbohydrates. Remember to stay hydrated and keep some “brain food” snacks ready—a banana, carrots, or a yogurt.

Most of all, remember that you've taken the time to prepare and study and that you've put in the time and effort to taking the exam. Walk into the exam confident that you know your stuff—for the majority of managers, you've been doing this work for years, and the exam is just there to make sure that you are competent to keep doing it. Chances are, you've had more difficult questions from board members or homeowners in the past. Best of luck! 🏠

Professionalism & Customer Service

First Contact to Last

by Julie Adamen
President, Adamen Inc.

You are at a local department store. You can't seem to find the type of pants you want. You look for a sales associate. You look high and you look low. You look over in the next department. And the next. Finally you find that lone sales person. As you walk up, you just know this 19 year-old with a ring in her nose madly texting behind the counter is not going to be able to help you. And you're right. In fact, she doesn't even look up and see you for a full 30 seconds. You say to yourself: "&%**\$%#@!"

This experience leaves you, the customer/client, angry and disgusted and vowing never to purchase from that retailer again. This scenario speaks of poor communication skills, which result in poor customer service.

What is Customer Service?

"Customer care activities that support the delivery of the product or core service." <http://www.cval.com/glossary.htm>

In our industry, almost all we provide is customer service. This customer care takes on many forms. Much of good customer service is directly connected to good communication between provider and client. This crucial communication connection should be the cornerstone in which we build our business and by what our industry is and should be measured. For our purpose in this article, we will discuss the limited topics of First Contact (reception), Middle and Continual Contact (the manager) and Last Contact (when we lose an account).

Customer Service, Communication and Professionalism

First contact: Reception

Reception is the most vital component in good First Contact and first communication, yet those providing reception are mostly overlooked and underpaid. Here are a few observations that can be said not just of our companies, but maddeningly, of many businesses and organizations:

In a rush. "HelloXYZmanagemnetcanyouholdon?" And before you can get a "yes" or "no" or "What?" out of your mouth, there you are, on hold. A deep, dark, cold hold.

Uninformed. Reception: "How many I direct your call?" Caller: "I'd like to speak to Joe Smith, please." Reception: "Uhhh, uh there is no one here who goes by that name" Caller: "There must be as he left me a message about an hour ago" Then you listen to the ensuing silence, and the inevitable scramble to find a Joe Smith. Most of the time, Joe is found. Other times, he's MIA. Other times, the receptionist simply denies that Joe is a employee, leaving you to call back after some time has passed so another receptionist who knows Joe can direct your call. When this



happens to me, I think: If I had been a Board member, I would have some serious doubts about the management of that office.

Inappropriate business language. It seems that many of our young people leave school with little knowledge of the English language, and even less knowledge of what to say on the telephone to a client (maybe if they could text message the client it would be better). Unfortunately, many of these younger folks populate our reception desks as entry-level positions. Executives—you should periodically listen to what these folks are saying to your customers. Sometimes the grammar is poor, sometimes it is simply too informal in a business setting (“Thanks, dude!”) According to Mark Bauerlein, author of “The Dumbest Generation,” “The verbal values of adulthood and adolescence clash, and to enter adult conditions, individuals must leave the verbal mores of high school behind.” My advice - give them a script if they can’t improvise in a way that reflects positively on your firm. This is a common practice in the business world, and once the script is learned it becomes very natural and easy for the speaker and much better for the client.

The auto-answering system: Sometimes better, sometimes not. If you have an auto-answering system and it’s user-friendly, that’s well and good and probably saves your firm money, and is often better than the live alternative. But here’s where the auto-answer goes off the track for your clients: Auto reception: “Spell the first or last name of the individual you are trying to reach.” There are some inherent problems with this method of robotic communication that maybe we haven’t thought about, such as a) The client may have to find her glasses (numbers are way too small on the dial pad); b) She may not know how to spell the person’s name; c) She may not know the person’s last name; d) She spells the name right, but that person isn’t in the system, seemingly having joined the Witness Protection Program. So, without option, the client goes to voicemail hell, The General Mailbox, also known as The Great Void Where all Messages Go to Die. Not a good method of communication nor of customer service.

Nothing is more important than a first impression and the abilities of the reception staff directing the overall company communication are those persons who impart that impression. Have an auto-answering system? It has a programmable solution, the problem being that someone at the executive level periodically needs to walk through the system exactly as if they were a client before that solution is implemented. Until then, it’s a first impression that you may not want to be making. Make no mistake: Poor communication = poor customer service = poor professionalism.

Middle and Continual Contact: The Manager

The manager has the most consistent contact with the client so the tenets of good customer service and communication on the manager’s part are very, very important. Most all require good communication skills which impart good customer service and promote the professionalism of the organization. For the manager here are some very basic Do’s and Don’ts:

Do return calls and email. You don’t have to do it immediately, but generally you need to return calls within 24 business hours, and the same with email. Ah, but you say with

email, everyone expects a faster response, right? Use auto-reply, and get to it when it’s appropriate.

Do write well. A poorly written email or letter may not communicate what you want, and more importantly, what your client wants. If you don’t write well, take a composition class, read more, acquire “form” letters from someone in your office who does write well, and continue to write. Each of these things will, over time, make you better at written communication. You may think how well you write has nothing to do with good customer service. You’re wrong. Remember, if you are not communicating in the manner wanted and needed by the client that is poor service to your customers. Again: Poor communication = Poor customer service = poor professionalism.

Do what you say you are going to do, when you say you are going to do it. Nothing communicates poor customer service and a lack of professionalism faster than saying you are going to do something, and then not doing it, or, doing it but at a much later time than you indicated.

Do look the part. How you present yourself in person communicates volumes to the client. Dress appropriately. How you dress can put a client at ease or on edge by indicating an air of confidence, insecurity or indifference. Think: You’d have more confidence an attorney if s/he is wearing suit, as opposed to a T shirt, jeans and flip-flops.

Don’t give an answer you aren’t sure about. You aren’t omnipotent or omniscient, you are a human being. If you don’t know something, say so, research the issue, develop a response and impart the information to the appropriate party. How many times have you been told by a “help desk” or “order desk” something that was totally inaccurate? Maddening, isn’t it? Don’t fall into that trap. As I always say, you don’t have to know everything, all the time, right now.

Don’t blame others. It may be the fault of the accounting department, but you’re the manager, and the buck stops with you. Nothing communicates more loudly than the blame game, and it communicates volumes about you, indicating your serious lack of understanding of basic customer service skills. Instead of passing the buck, acknowledge the problem, take responsibility for rectifying, not causing, the problem (unless you did) and move onto fixing it. Everyone makes mistakes eventually. Usually, it’s not the mistake (or who’s fault it was), but how you handle it, is what is important to the client

I’ve written and spoken about communication many times over the years in relation to managers. Good communication skills are one of the Top Traits of Great and are everything in this business. But communication goes beyond how we speak and write letters. It’s in how well we perform and present every hour, every day. Good communication = good customer service = more professionalism.

Last Contact: Professionalism, Customer Service and Losing an Account

No one likes to lose an account, but it’s a fact of any business. In our business, an account can be lost for a real reason (5 managers in two years) or for no reason at all. So, now armed with that knowledge and the mind of a grown-up, why on earth so many of us still choose to take the low road when it comes to turning

that account over to another management company is beyond me because our clients talk to potential and existing clients. What's the low road? I'm sure some of you have heard about it, but here are just a few examples that have come to my attention over the years:

- Dumping all records in trash bags;
- Dumping records in the dumpsters;
- Deliberately foot dragging on turnover of records;
- Doing zero for the association the last month of the contract;
- Withholding the checking account;
- "Losing" signature cards;
- "Losing" Minute books;
- "Losing" ageing lists, alpha lists, contractor lists, insurance declaration sheets;
- Refusing to give owners any new contact information after turnover has taken place;
- Refusing to answer even the simplest of inquiries from the new manager/ management company/Board;
- Sabotage of physical property.

And the list goes on.


What you do when you lose an account communicates volumes about you and your firm's professionalism to the former client, to potential clients, to other staff members, to the new management company and to the local industry as a whole. So in addition to the obvious admonition to management companies who still partake in these types of activities, here are some suggestions for handling account turnover with a tad more dignity and a lot more

professionalism. Poor account turnover = very poor customer service = a professional vacuum = loss of future revenue.

Do maintain professional detachment throughout the life of the contract. What drives management companies or individuals to perform any act of sabotage when an account is lost? They want revenge, and revenge is motivated by emotion. The only one who really suffers from this behavior is the departing management company by ensuring that account will never return to their portfolio. Detach, folks, and maintain a professional distance at all times and with all clients. It may well keep you from giving in to emotion that may be satisfying in the short-term but is only to your detriment in the long-term. Executives, you may wish to impart this "detachment" thought process to your managers who may be inclined to be emotional about account loss.

Do manage until the bitter end. Even if you lost an account to a terrible management firm, even if the account has made your life less comfortable than you would wish, even if the account left for no reason, even if you are in a dispute over payment, manage until the last day. Why? Aside from it being the right thing to do, it establishes and maintains you and your firm's reputation for customer service. If you are professional, anything less should be beneath you.

Do keep lines of communication open. Be available to answer questions from the new management firm (within reason, of course) for their first 30 days, and beyond that if it is of dire



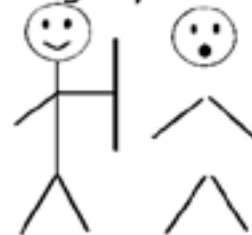
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importance. Be available to the Board President as well, under the same conditions. Make sure that staff is informed on who the new management firm is, and as owners call in (and they invariably will) to express a complaint or concern, direct them to the new management firm and its phone number. It only makes good long-term business sense to do so.

Don't Sabotage. Access codes changed, keys broken off in locks, pool filters & sprinkler heads damaged, files corrupted, etc. Frankly, I can't believe anyone would waste their time with this juvenile and sometimes criminal behavior. I can barely bring myself to talk about it, but to make your last contact with an association an act of sabotage is beyond the pale and will come back to haunt you in one way or another. You reap what you sow. Grow up.

Executives: Do take the high road. Have a standard checklist and timeframe of turnover items. What items are turned over, to whom they are turned over, the timeframe in which they are turned over, and the manner in which they are turned over should all be in a company checklist, and be Standard Operating Procedure within your management firm. In addition, these procedures should be outlined within your management contracts, because it indicates your professionalism by committing to, in writing, how your firm will handle this last contact with the client. Somehow I doubt "Files will be placed in the dumpster behind Rite Aid for retrieval by the new management firm" will be outlined in your contract.

The Wrap Up.

Sigh. I would argue that the "customer service mindset" has changed considerably in the past 20 years, and though good service can be found (think Nordstroms, or Zappos.com) there is plenty of that poor service out there. And while we in the community management business can become hyper-aware of poor customer service, we sometimes, oddly, can be unaware of it in our own companies in the service we provide to our clients. Why do we ignore certain aspects of customer service? My guess would be that it's not intentional, but more along the lines of benign neglect: After all, the walls aren't caving in, are they? Well, no, but poor customer service doesn't usually have that all or nothing effect, it usually takes its toll bit by bit until an account is lost and we may not even realize it was a poorly handled call or letter that finally broke the camel's back.

Much of poor customer service—be it in a grocery store, a doctor's office or a community management office, has to do with a lack of understanding of what constitutes good customer service. In our industry it is basically good communication. Good communication = good customer service = continued professionalism = continued revenue. Put on a smile on your face, develop a good attitude, do what you say you are going to do and communicate often and well. Let's strive to provide good, even great, customer service from First Contact to Last. ⬆

Julie Adamen is president of Adamen Inc., a consulting and placement firm specializing in the community management industry. Julie can be reached via email at julie@adamen-inc.com or through her website www.adamen-inc.com.



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5 Life Changing Lessons

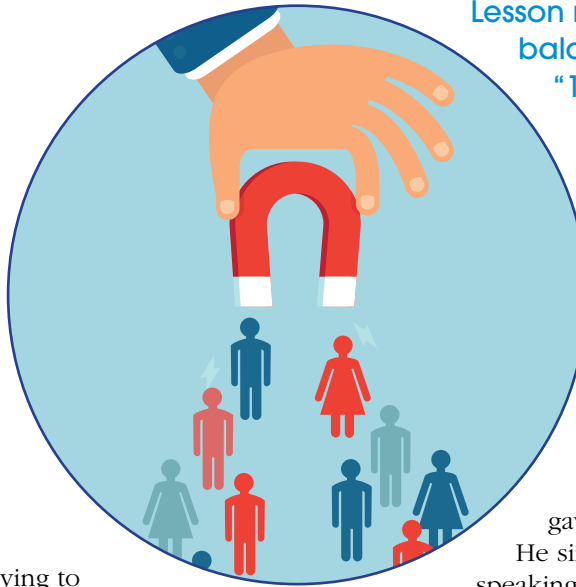
by Chris Mott
Motivational Speaker

Who are you and why are you here? Why are those questions so vital to your success? Because in order for you to accomplish anything in life, you must first define your story.

Lesson number one—If you wish for specific results your supporting story must be specific.

Can you easily answer those questions or are you struggling trying to find the answers? If you're like the majority of Americans, you've been struggling with those questions for a very long time. If you're in the majority, don't worry. All is not lost. In fact, I didn't figure out the answers, until I was in my forties. Yes, I spent over two decades in the property management industry working my way from porter to president. It wasn't until I left the industry and started my own coaching business that I realized who I was and why I was placed on the planet. The answers actually came to me via my first ever coaching client. I can remember it like it was yesterday. I was in North Carolina prepping to speak to the members of a local apartment association. For some reason, I was a bit nervous. I suppose my never ending nerves surrounding speaking are connected to the responsibility I feel when I'm on stage.

As I was fighting off the nerves, life did as it has many times before. It gave me exactly what I needed, exactly when I needed it. I'm sure you can relate. My rescue came in the form of one email. The email was from my first coaching client. Let's turn the clock back about 6 months. This client had reached out to me and asked me for help. I started off by asking him how he felt about his life as a whole on a scale of one to ten (ten being the best). Why is this so important? Because the law of attraction depends on it. Why is the law of attraction so important? Because no matter what type of business you're in, you are ruled by the law of attraction. Yes, you can never attract anything but what you are. Everything is dependent upon your personal energy.



Lesson number two—"Your strength and balance matters. In order to manifest "10" type results, you must first be a "10."

When this client came to me, he was a "2". This is not good to say the least. Fast forward six months, in this email, my client wrote to me to say the following, "Thank you! Why? Because today, I'm a "15!" Yes, that's right. He just jumped way over my bar!

Lesson number three—"Don't let anyone box in your potential."

Then he gave me back everything I gave him through the coaching process. He simply said the following. "I know your speaking in front of hundreds tonight and I simply want you to do for them what you've done for me. Go change their lives forever!" Wow! This blew me away! Why? Because my client had just answered those two questions for me. Who am I and why am I here? I am here to change lives. In one sentence, he blessed me with my purpose. So my question to you is this. Why can't you live each day with the same purpose? Don't you have the same opportunity every minute?

Lesson number four—You are a life changer. Go change lives!

Despite the four previous lessons, this is the brutal truth. As I travel all over the country, I throw out the following statistic. 95 percent of you won't do what's good for you even if it's served to you on a silver platter. Yes, even if you totally agree with what I've said above, only 5 percent of you will take action to create positive change in your life. Those are some dismal statistics! Want me to prove it? Ok here it goes. Here's the double dog dare! I dare you contact me via email at chris@mottivation.com. Anyone destined to be anything but mediocre and who wishes to be in the top 5 percent will contact me. In return, I will bless those in the five percent with a free hour of coaching that's sure to launch you in an empowered direction.

The final lesson—In order to live differently, you must act differently. ⬆

Why is it Important to Hire a Credentialed CAI Professional?

by Bryan Farley, Reserve Specialist
President of Association Reserves Colorado, LLC

Picture this scenario: a self-managed 20-unit condominium association is looking for a property manager to help manage the burden and stress of collecting late HOA dues, directing board meetings, and finalizing the budget. The board members wade through a pile of contracts and finally choose one based on the low price. Fast-forward six months later. The board members realize that they cannot afford to replace their roof, because \$12,000 is missing from their reserve account. They soon discover the recently hired property manager has fled to Mexico. Could this dire situation have been avoided?

One of the most important responsibilities that board members face each year is choosing the right professional to help ensure that their HOA is managed efficiently and effectively. Choosing the right professional can be a tedious and time-consuming process, but selecting the right vendor will give board members peace of mind and save them from headaches and even money wasted.

Thankfully, Community Associations Institute (CAI) has developed an accreditation program to help board members understand which vendors provide top quality service in their respective fields. These qualified professionals with CAI-backed credentials will help you improve the quality of your community association.

According to CAI, these are the credentials the organization currently awards:

1. Certified Manager of Community Associations® (CMCA®)

This is recommended for all community association managers. The CMCA is the first step in gaining the fundamental knowledge you need to manage any type of community association.

- The initial step to becoming CMCA certified is to Enroll in the CAI Professional Management Development Program.
- Complete and submit the CMCA application.
- After successfully completing the course, the manager will be given materials to sign up for the CMCA Examination.

2. Association Management Specialist® (AMS®)

- Awarded after two (2) years verified experience in financial, administrative, and facilities management of at least one association.
- Managers must successfully complete at least two management courses and pass the CMCA exam administered by CAMICB.
- Managers must re-designate every three years in August and follow through with continuing education requirements.

3. Professional Community Association Manager® (PCAM®)

- Awarded after five (5) years of direct community association management experience.
- Managers must successfully complete (6) management programs
- Manager must pass the CMCA examination administered by CAMICB.
- Managers must also provide a Case Study to the CAI board. Managers must re-designate every three years in August and follow through with continuing education requirements.

4. Accredited Association Management Company® (AAMC®)

- Awarded after a minimum of three years of experience providing community association management services.
- The company must have a Professional Community Association Manager (PCAM) designee as the company's senior manager.
- 50% of managers on staff must hold a professional designation (CMCA, AMS, or PCAM).
- The company must maintain fidelity, general liability, and worker's compensation insurance in addition to meeting federal, state and local laws.
- A company must comply with the CAI Professional Manager Code of Ethics.
- To retain the designation, all designated staff members must complete at least 12 hours of continuing education every two years

5. Large-Scale Manager® (LSM®)

- A LSM candidate must have ten years of verified, direct community association management experience or five years of community association management experience and five years of municipal management or a comparable position of responsibility at the executive level.
- The manager must successfully complete CAI's large-scale management course or attend one Large-Scale Managers Workshop. For the purpose of this program, the definition of a large-scale community is:
 - o A single, contiguous community association with an on-site, full time manager
 - o A minimum of 1,000 units or a minimum of 1,000 acres
 - o A minimum annual operating budget of 2 million dollars
- Re-designation requires the attendance at one (1) Large-Scale Manager Workshop and one (1) CAI Annual Conference and Exposition.

6. Reserve Specialist (RS)

This designation is awarded to qualified reserve specialists who, through years of specialized experience, can help ensure that community associations prepare their reserve budget as accurately as possible. RS designees must meet comprehensive requirements including:

- Preparing at least 30 reserve studies within the past three calendar years
- Hold a bachelor's degree in construction management, architecture, or engineering (or equivalent experience and education)
- Complying with strict rules of conduct outlined by the Professional Reserve Specialist Code of Ethics.

7. Community Insurance and Risk Management Specialist (CIRMS)

The CIRMS designation recognizes a demonstrated high level of competency within the risk management profession. CIRMS designees must:

- Have five years' experience in the community association insurance field
- Be of satisfactory legal and ethical standing in the industry

As you can see, this is a thorough process that requires the vendors to follow a code of ethics, rigorous testing, and verifiable experience. CAI acts as a third party to ensure that the accredited professionals are competent, provide quality service, and behave ethically. Once certified, these professionals have proved that they have the knowledge, ethical standards, professionalism, and experience within their industry to adequately serve a potential client. Board members will benefit from the convenience and peace of mind that comes from working with accredited CAI vendors. ⬆

Bryan Farley is a credentialed Reserve Specialist and the president of Association Reserves Colorado, LLC.

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Managers Must Be Licensed By The State On July 1, 2015

While it seems that manager licensing has been talked about for months and for many managers—years, with the recent enactment of the Manager Licensing Bill, managers should be well aware that they need to obtain a license by July 1, 2015 through the Department of Regulatory Agency (DORA). Recently, I was at an event and while many different subject matters were being addressed, when the issue of manager licensing came up it was noted by more than one person that they were surprised by the lack of information regarding this important topic. So as much as CAI continues to try to get the information out to all managers in Colorado it is apparent that there continues to be a need to spread the word. To that end, this issue of *Common Interests* is focusing on this important topic; if you have attended Lunch-n-Learns, classes at conferences, read the email blasts, some of this may be redundant but as the rules are a moving target take a moment to review the information included. If you have colleagues throughout Colorado, take a moment to make sure they have the information so that they can also be prepared to become a licensed manager over the next several months.

Emergency Rules Enacted: In early January, DORA enacted emergency rules in regard to Manager Licensing that affect three areas: Emergency A Rules – Applications and Examinations; Emergency C Rules – Licensing – Office, and Emergency D Rules – Renewal, Transfer, Inactive License, Reinstatement and Insurance. As it is important that each manager know and understand the impact of manager licensing, the entire text of the Emergency Rules that were enacted are included in this month's issue of *Common Interests* starting on page 27. Please read through the information so you have a basis of what these rules are focusing on.

Permanent Rules for Manager Licensing: The permanent rules to Manager Licensing will be completed later this year. Prior to finalizing the rules, DORA will conduct hearings on the proposed rules in May. As information regarding the hearings becomes

available, it will be sent to the membership via email blasts.

Manager Licensing Preparation: Be aware that as a community association manager, obtaining a license is more than just walking into the DORA office and paying the license fee. You will be required to take a test, through DORA, that covers both governance of community associations and Colorado law that affects associations (primarily CCIOA and the Colorado Non-Profit Act) and you will have to be fingerprinted by an independent third party for submission to DORA. Even if you have been fingerprinted previously for any reason, you will need to have it done again and sent to DORA. The Colorado Bureau of Investigation and most police departments can do the fingerprinting. We suggest utilizing Google for locations closest to you.

If you have not obtained your CMCA certificate, it is strongly recommended that you sign up for an M-100 class through CAI and work toward obtaining this certification. The M-100 classes offered in Colorado are now also providing a Colorado law section that will assist you in preparing for the test given by DORA. For all managers, there will be many offerings for classes on both portions of the exam so that you are well prepared for the test.

What happens if you fail to obtain a license? Wait a minute... I've been a manager for way too many years and now I have to be licensed? Really? This is not the time to bury your head under the mountains of paperwork on your desk. There are consequences for those who are providing community management services and who are not licensed after July 1, 2015. Fines and the inability to serve as a manager could be the result. Don't take a chance, make a late New Year's resolution and be proactive about obtaining your licensing.

Manager licensing is going to happen and while the rules around the licensing are a moving target, take the steps now to be ready for July. For updated information, please regularly check the CAI-RMC website, www.cai-rmc.org, and click on the manager licensing section of the website. Also look for continuing email blasts as to the latest changes regarding rule making.

DEPARTMENT OF REGULATORY AGENCIES
DIVISION OF REAL ESTATE
COMMUNITY ASSOCIATION MANAGERS
4 CCR 725-7

EMERGENCY RULE

A RULES – LICENSE QUALIFICATIONS, APPLICATIONS
& EXAMINATIONS

Pursuant to and in compliance with Title 12, Article 61 and Title 24, Article 4, C.R.S. as amended, notice of emergency rulemaking is hereby given, including notice to the Attorney General of the State of Colorado and to all persons who have requested to be advised of the intention of the Director of Real Estate to promulgate rules, or to amend, repeal or repeal and re-enact the present rules related to community association managers.

Section 1. Statement of Basis and Authority

Section 2. Scope and Purpose

Section 3. Applicability

**Section 4. A Rules – License qualifications,
applications & examinations**

Section 5. Effective Date

Section 1. Statement of Basis and Authority

The statutory basis for the rules titled Rules Regarding Community Association Managers is Part 10 of Title 12, Article 61, Colorado Revised Statutes, as amended.

Section 2. Scope and Purpose

The Director of the Division of Real Estate (“Director”) finds that immediate adoption of this emergency rule is imperatively necessary to comply with state law, including §§ 12-61-1001, C.R.S., et seq. (the “Act”) and that compliance with the rulemaking requirements of § 24-4-103, C.R.S., applicable to non-emergency rules, would be contrary to the public interest.

As a result of the passage of HB 13-1277, the Act requires licensing for anyone who engages in certain defined activities of a “community association manager” relating to the management of a common interest community. The legislation empowering the Director to promulgate rules is effective January 1, 2015 and individuals needing to be licensed must do so by July 1, 2015. As a result, it is imperatively necessary that the Director promulgate rules pertaining to the requirements needed for licensure on an emergency basis.

The purpose of this emergency rule is to ensure compliance with §§ 12-61-1001, C.R.S., et seq., and is to effectuate the legislative directive to promulgate necessary and appropriate rules for the implementation of part 10 of Title 12, Article 61.

The specific purpose of the emergency rules is to promulgate rules pertaining to the education, testing, licensing, and insurance requirements needed for licensure.

Without the immediate adoption of the emergency rules, the public’s interest is not served. Wherefore, pursuant to § 24-4-103(6), C.R.S., the Director has stated needs to adopt these emergency rules.

Section 3. Applicability

The emergency rules govern community association managers who are subject to the requirements of Part 10 of Title 12, Article 61 of the Colorado Revised Statutes.

**Section 4. A Rules: License Qualification,
Applications, & Examinations**

A-1) Definitions.

The following definitions are applicable to all rules in these Director rules:

1) The “Act” or the “Community Association Managers Practice Act” means §§ 12-61-1001, C.R.S., et seq.

2) “Community association manager” or “manager” has the meaning set forth in § 12-61-1001(4).

3) “Licensee” means any person or entity licensed as a community association manager pursuant to the Act.

4) “Community association management company” or “company” means any entity, including but not limited to a firm, partnership, limited liability company, association, or corporation, that meets the definition of a community association manager in § 12-61-1001(4), C.R.S., or applies to the Division to become a community association manager.

5) “Designated manager” means an individual who is designated to be a qualified active manager for a community association management company, qualified to act as a community association manager, and who is responsible for management and supervision of the licensed actions of the company and all persons employed by, or acting at any time on behalf of, the company and who is personally responsible for the handling of any and all common interest community funds received or disbursed by the company pursuant to § 12-61-1003(6)(b) and (7).

6) “Applicant” means any person or entity applying for licensure as a community association manager under the Act.

7) “License” means any license issued by the Director or the Division pursuant to the Act.

A-2) Requirements that must precede exam and application.

An applicant must hold one or more of the credentials set forth in § 12-61-1003(5)(a)(I)(A), (B), (C), and (D), C.R.S. or § 12-61-1003(5)(d), C.R.S., and provide proof of completion in a manner prescribed by the Director prior to applying for a community association manager license.

A-3) Qualifying education credential requirements.

An applicant must hold a credential pursuant to § 12-61-1003(5)(a)(I)(A), (B), (C), or (D), C.R.S., or § 12-61-1003(5)(d), C.R.S. or complete 24 hours of classroom instruction, or equivalent distance learning hours, and must successfully complete the following courses of study approved by the Director:

- 1) A minimum of 8 hours of Colorado Common Interest Ownership Act, Colorado Revised Nonprofit Act and other applicable provisions of Colorado law;
- 2) A minimum of 7 hours of financial, risk and facilities management;
- 3) A minimum of 5 hours of governance and legal documents of an association; and

4) A minimum of 4 hours of ethics, bid requests and contract provisions.

A-4) Exams only given to those qualified.

Only an applicant holding a qualified education credential as prescribed in Rule A-3 may sit for the community association manager licensing examination. However, one instructor from each approved educational provider offering a recognized credential pursuant to § 12-61-1003(5)(a)(I)(A),(B),(C), and (D), C.R.S., may sit for the examination one time during any 12 month period.

A-5) Community association manager license examination, exam expiration and application requirements.

The community association manager license examination is made up of two parts, a general portion and a state portion. If an applicant fails one or both parts of the exam, the applicant may retake the failed portion(s). A passing score for either part of the exam is valid for one year only. An application received by the Division must be accompanied by the statutory fee, proof of completion of the required credential and proof of successful completion of both portion(s) of the exam within the year prior to the application being received by the Division. No exam score for either portion of the exam will be considered valid after one year.

A-6) Exam results certified only if licensed.

The Director will not certify any information concerning the results of any examination as it pertains to any person who has taken the examination unless such person is or has been licensed as a Colorado community association manager.

A-7) License processing time frames.

Provided that an applicant has submitted a complete and satisfactory application in compliance with § 12-61-1002, C.R.S., § 12-61-1003, C.R.S., and all Director rules, the Director will issue a license within 10 business days after receipt by the Director of satisfactory results from the fingerprint-based criminal history record check. If the application or record check is not complete or satisfactory, the applicant will be notified that their license application has been deferred pending receipt of required compliance item(s). The application for a community association manager license that has been approved by the Director subject to the receipt of certain compliance items will be issued on an inactive status until all compliance items have been received by the Director. No activities requiring a license may be performed while the license is on inactive status.

A-8) Applicants who have held a community association manager license in another jurisdiction.

In lieu of the qualifying education credential requirements found in Rule A-3, an applicant who has held a community association manager license in another jurisdiction, as set forth in § 12-61-1003(5)(d), C.R.S., may submit a "certification of licensing history" issued by each jurisdiction where the applicant is currently or was previously licensed as a community association manager. The license history must be submitted prior to sitting for the exam, along with a complete and satisfactory application in accordance with all Director rules. The Director will issue

a license within 10 business days after receipt by the Director of satisfactory results from the fingerprint-based criminal history record check, and a determination by the Director that the applicant has established they possess the credentials and qualifications substantively equivalent to the requirements for Colorado licensure. Within 30 calendar days after issuance of the community association manager license, the applicant must complete successfully, and provide the Director proof of successful completion, of the state portion of the exam. Failure to provide the Director with proof of successful completion of the state portion of the exam in the prescribed timeframe will result in the license being placed on inactive status and no activities requiring a license may be performed.

A-9) Applicant with previous suspension or revocation of a community association manager license or certification.

Pursuant to § 12-61-1003(3)(b), C.R.S., an applicant who has held a community association manager license or certification that has been suspended or revoked in Colorado or in any other jurisdiction that regulates community association managers within the last 10 years, with at least 2 years having elapsed since the date of that suspension or revocation, must file prior to or with their application for licensing the following information and documents:

- 1) A written and signed personal explanation and detailed account of the facts and circumstances surrounding each suspension or revocation;
- 2) The completed community association manager application addendum form found on the Division's website;
- 3) Results of any hearing(s), and copies of the official reports of the suspension and revocation from the jurisdiction where any such suspension or revocation took place;
- 4) If the applicant is to be employed under a designated manager licensee, then that designated manager must submit a letter stating that he or she is aware of the specific suspension(s) or revocation(s) and has agreed to employ the applicant; and
- 5) Any other documentation requested by the Director.

A-10) Applicant with prior legal involvement.

Pursuant to § 12-61-1003(3)(c), C.R.S., an applicant who has been convicted of or pled guilty or nolo contendere to a misdemeanor or a felony, has misdemeanor or felony charges pending against him or her, or has agreed to a deferred prosecution, deferred judgment, or deferred sentence that is not yet completed, excluding all misdemeanor traffic violations (collectively referred to as a "violation"), must file prior to or with his or her application for licensing the following information and documents:

- 1) A written and signed personal explanation and detailed account of the facts and circumstances surrounding each violation;
- 2) The completed community association manager application addendum form found on the Division's website;
- 3) Results of all court hearing(s) related to each violation, in the form of copies of charges, disposition, pre-sentencing report and most recent probation or parole report;
- 4) If the applicant is to be employed under a designated manager licensee, then that designated manager must submit



a letter stating that he or she is aware of each violation and has agreed to employ the applicant; and

5) Any other documentation requested by the Director.

A-11) Preliminary advisory opinion.

At any time prior to submission of a formal application for licensure, a person may request that the Director issue a preliminary advisory opinion regarding the potential effect that previous conduct, license and certification suspension(s) or revocation(s), criminal conviction(s), or violation(s) of community association law, may have on a formal application for licensure ("PAO"). A PAO may be issued by the Director in his or her sole discretion, in order to provide preliminary advisory guidance.

1) Potential applicants may request a PAO for any of the following reasons:

- a) If the individual has been convicted of, plead guilty or nolo contendere to any crime in a domestic, foreign or military court;
- b) If the individual has held a community association manager license or certification that has been suspended or revoked within the last 10 years;
- c) If the individual has had other professional licenses, certifications or registrations issued by Colorado, the District of Columbia, any other states or foreign countries, revoked or suspended for fraud, theft, deceit, material misrepresentations or the breach of a fiduciary duty and such suspension or revocation denied authorization to practice as: a mortgage loan originator or similar license; real estate broker; real estate appraiser; an insurance producer; an attorney; a securities broker-dealer; a securities sales representative; an investment advisor; or an investment advisor representative; or
- d) Any other conduct that would impact the public trust.

2) Individuals requesting a PAO must complete the preliminary advisory opinion application located on the Division of Real Estate's website.

3) Individuals requesting a PAO must submit all relevant documents related to any conduct or actions as set forth herein. Incomplete requests will not be processed. The Director may, at any time, request additional information regarding the PAO request. Such relevant or related documents may include, but are not limited to:

- a) Police officer reports;
- b) Dispositions documents;
- c) Court documents;
- d) Original charges documents;
- e) Stipulated agreements; or
- f) Final Agency Orders.

4) Individuals requesting a PAO must submit a written and signed personal explanation and detailed account of the facts and circumstances.

5) Any PAO will not be binding on the Director or limit the Director's authority to investigate a future formal application for licensure.

6) An individual seeking a PAO is not an applicant for licensure and the issuance of an unfavorable opinion will not prevent such individual from making application for licensure pursuant to the Act and these Director rules.

7) No PAO shall be considered final agency action. PAOs are

not subject to appeal or judicial review.

A-12) Criminal history check required prior to application.

An applicant for an initial license must submit a set of fingerprints to the Colorado Bureau of Investigation and the Federal Bureau of Investigation for the purpose of conducting a state and national criminal history record check prior to submitting an application for a license. Fingerprints must be submitted to the Colorado Bureau of Investigation for processing in a manner acceptable to the Colorado Bureau of Investigation. Fingerprints must be readable and all personal identification data completed in a manner satisfactory to the Colorado Bureau of Investigation. The Director may acquire a name-based criminal history record check for an applicant who has twice submitted to a fingerprint-based criminal history record check and whose fingerprints are unclassifiable.

A-13) Denied license notice required.

If an applicant for licensure is denied by the Director for any reason, the applicant will be informed in writing of the denial and the reason(s) therefore. As set forth in § 12-61-1011, C.R.S., an applicant whose license application was denied for any reason has a right to a proceeding on the denial to be conducted by an authorized representative of the Director or by an administrative law judge pursuant to §§ 24-4-104 and 24-4-105., C.R.S.

A-14) Director has course audit authority.

The Director or his or her designee may audit any course of study and may request from each educational provider of any course under § 12-61-1003(5)(a)(I) through (III), C.R.S., all instructional material related thereto and student attendance records as may be necessary for an investigation in the enforcement of the Act and these Director rules. The purpose of such audit is to ensure that educational providers and credential providing entities adhere to the approved course of study and credential designations, offer course material and instruction consistent with acceptable education standards and instruct in such a manner that the desired learning objectives are met. Failure to comply with the provisions of this rule may result in the withdrawal of Director course and designated credential approval.

A-15) Invalid payment voids application.

If the fees accompanying any application or registration made to the Director (including fees for renewals, transfers, etc.) are paid for by check and the check is not immediately paid upon presentment to the bank upon which the check was drawn, or if payment submitted in any other manner, and payment is denied, rescinded or returned as invalid, the application will be deemed incomplete. The application will only be deemed complete if the Director has received payment of all application or registration fees together with any fees incurred by the Division including the fee required by state fiscal rules for the clerical services necessary for reinstatement within 60 days of the Division mailing notification of an incomplete application.

Section 5. Effective Date

This emergency rule is effective January 6, 2015.



DEPARTMENT OF REGULATORY AGENCIES
DIVISION OF REAL ESTATE
COMMUNITY ASSOCIATION MANAGERS
4 CCR 725-7
EMERGENCY RULE
C RULES – LICENSING – OFFICE

Pursuant to and in compliance with Title 12, Article 61 and Title 24, Article 4, C.R.S. as amended, notice of emergency rulemaking is hereby given, including notice to the Attorney General of the State of Colorado and to all persons who have requested to be advised of the intention of the Director of Real Estate to promulgate rules, or to amend, repeal or repeal and re-enact the present rules related to community association managers.

Section 1. Statement of Basis and Authority
Section 2. Scope and Purpose
Section 3. Applicability
Section 4. C Rules – Licensing – Office
Section 5. Effective Date

Section 1. Statement of Basis and Authority

The statutory basis for the rules titled Rules Regarding Community Association Managers is Part 10 of Title 12, Article 61, Colorado Revised Statutes, as amended.

Section 2. Scope and Purpose

The Director of the Division of Real Estate (“Director”) finds that immediate adoption of this emergency rule is imperatively necessary to comply with state law, including §§ 12-61-1001, C.R.S., et seq., (the “Act”) and that compliance with the rulemaking requirements of § 24-4-103, C.R.S., applicable to non-emergency rules, would be contrary to the public interest.

As a result of the passage of HB 13-1277, the Act requires licensing for anyone who engages in certain defined activities of a “community association manager” relating to the management of a common interest community. The legislation empowering the Director to promulgate rules is effective January 1, 2015 and individuals needing to be licensed must do so by July 1, 2015. As a result, it is imperatively necessary that the Director promulgate rules pertaining to the requirements needed for licensure on an emergency basis.

The purpose of this emergency rule is to ensure compliance with §§ 12-61-1001, C.R.S., et seq., and is to effectuate the legislative directive to promulgate necessary and appropriate rules for the implementation of part 10 of Title 12, Article 61.

The specific purpose of the emergency rules is to promulgate rules pertaining to the education, testing, licensing, and insurance requirements needed for licensure.

Without the immediate adoption of the emergency rules, the public’s interest is not served. Wherefore, pursuant to § 24-4-103(6), C.R.S., the Director has stated needs to adopt these emergency rules.

Section 3. Applicability

The emergency rules govern community association managers who are subject to the requirements of Part 10 of Title 12, Article 61 of the Colorado Revised Statutes.

Section 4. C Rules: Licensing – Office

C-1) Individual proprietor must be sole owner.

A community association manager licensed as an individual doing business under a trade name must be the sole owner of that trade name.

C-2) Individual proprietor may not appear to be corporate.

A community association manager licensed as a sole proprietorship may not adopt a trade name which includes the following words: Corporation, Partnership, Limited Liability Company, Limited, Incorporated, or the abbreviations thereof.

C-3) Qualifications for community association management companies.

As set forth in § 12-61-1003(6), C.R.S., when a community association management company submits a license application to qualify as a community association manager, it must comply with the following:

1) Designate and maintain a qualified active manager for the community association management company who is responsible for management and supervision of the licensed actions of the company and all persons employed by, or acting at any time on behalf of, the company and who is personally responsible for the handling of any and all common interest community funds received or disbursed by the company pursuant to § 12-61-1003(6)(b) and (7); who has passed the examination for licensees set forth in the Act and these Director rules; and who is qualified to act as a community association manager under the Act and these Director rules.

2) If the community association management company is a corporation, it must certify that:

- a) The corporation has been properly incorporated with the Colorado Secretary of State or is authorized to do business in Colorado, and is in good standing, proof of which must be included with the application;
- b) If an assumed or trade name is to be used, it has been properly filed with and accepted by the Colorado Secretary of State, proof of which must be included with the application; and
- c) The applicant has designated a qualified active manager who has been appointed by the corporation’s board of directors to act as designated manager for the corporation.

3) If the community association management company is a partnership, it must certify that:

- a) The partnership has been properly registered with the Colorado Secretary of State and is in good standing, proof of which must be included with the application;
- b) If an assumed or trade name is to be used, it has been properly filed with the Colorado Secretary of State, proof of which must be included with the application; and
- c) The applicant has designated a qualified active manager who has been appointed the designated manager for the partnership by all general partners or managers/officers of the partnership.

4) If the community association management company is a limited liability company, it must certify that:

- a) The limited liability company has been properly registered with the Colorado Secretary of State and is in good standing, proof of which must be included with the application;
- b) If an assumed or trade name is to be used, it has been properly filed with the Colorado Secretary of State, proof of which must be included with the application; and
- c) The applicant has designated a qualified active manager

who has been appointed the designated manager for the limited liability company by all managers, or if management has been reserved to the members in the articles of organization, by all members of the limited liability company.

C-4) Individuals employed by a community association management company or a common interest community.

Any community association management company, sole proprietorship, or common interest community that employs individuals who perform activities requiring a community association manager license pursuant to § 12-61-1001(3), C.R.S., must designate and maintain a qualified active designated manager.

C-5) Resident community association managers required to have office; exceptions.

Every resident Colorado community association manager must maintain and supervise a community association management practice with an office that is available to the public, except those community association managers registered in the Division as in the employ of a designated manager or those community association managers registered as inactive.

C-6) Designated manager availability.

Any community association manager licensed as a sole proprietorship or as a designated manager for a corporation, partnership, or limited liability company must be reasonably available to manage and supervise such community association management practice.

C-7) Community association manager license non-transferable.

No agreement will be entered into by any licensee whereby the licensee transfers or lends their name or license to another to avoid or evade any provision of the Act or these Director rules.

C-8) Corporate license name may not duplicate suspended/revoked license.

The Director may refuse to issue a community association manager license to a community association management company if the name of said company is the same as that of any other community association management company whose license has been suspended or revoked, or is so similar as to be easily confused with that of the suspended or revoked company by members of the general public.

C-9) No license name identical to one previously issued.

No community association manager license will be issued to a community association manager under a trade name, corporate, partnership or limited liability company name which is identical to another licensed community association manager's trade name, corporate, partnership or limited liability company name.

C-10) Community association manager activity only in trade name or full licensed name.

A community association manager may adopt a trade name according to Colorado law and such trade name will appear on the face of the license. However, pursuant to § 12-61-1003(8), C.R.S., such manager must conduct business only under such trade name, or conduct business under the entire name appearing on the face of the license. Community association managers, who are licensed under a designated manager that is doing business under a trade name, will be licensed under the entire name appearing on the face of the license.

C-11) Name rules.

Pursuant to § 12-61-1003(8), C.R.S., a person will not be licensed as a community association manager under more than one name, or conduct or promote business as a community association manager except under the name under which the person is licensed. However, the use of a trade name, with the permission of the owner of such trade, name may be used concurrently with the licensed name of the community association management company in the promotion or conduct of the licensed community association management business.

1) No licensee or community association management company will advertise or promote its business in such a manner as to mislead the public as to the identity of the licensed community association manager or company; nor may a portion of the licensed name of any community association manager or company be advertised or promoted in a manner which would mislead the public as to the identity of the licensed manager or company.

2) Any licensee or community association management company using a trade name, the use of which requires obtaining permission from another who has an existing and continuing right in that trade name by virtue of any state or federal law, will clearly and unmistakably include the licensee or community association management company name as registered with the Director in addition to the trade name in a conspicuous and reasonable manner in any of the following:

- a) Advertising;
- b) Business cards;
- c) Letterhead;
- d) Contracts or all other documents relating to community association management business; and
- e) Signs displayed at a place of business.

C-12) Notice of termination; designated manager.

A community association management company and its designated manager both must immediately notify the Director in writing of the termination of the designated manager's status as designated manager for the company, or upon the designated manager's failure to comply with the Act or these Director rules. Unless a temporary designated manager license is obtained in compliance with the provisions of Rule C-13, upon such notification the designated manager, entity and all employed licensees will be placed on inactive status.

C-13) Temporary designated manager license.

Pursuant to § 12-61-1003(6)(c), C.R.S., a temporary designated manager's license may be issued to a community association management company to prevent hardship for a period not to exceed 90 days to the person so designated. No designated manager license will be approved unless the individual designated holds a community association manager license and meets all additional requirements pursuant to § 12-61-1003(6), C.R.S. and these Director rules.

C-14) Inactive license.

A community association manager license may be issued while on inactive status. No activities requiring a license may be performed while a license is on inactive status.

Section 5. Effective Date

This emergency rule is effective January 6, 2015.



DEPARTMENT OF REGULATORY AGENCIES
DIVISION OF REAL ESTATE
COMMUNITY ASSOCIATION MANAGERS
4 CCR 725-7
EMERGENCY RULE
D RULES – RENEWAL, TRANSFER, INACTIVE LICENSE,
REINSTATEMENT & INSURANCE

Pursuant to and in compliance with Title 12, Article 61 and Title 24, Article 4, C.R.S. as amended, notice of emergency rulemaking is hereby given, including notice to the Attorney General of the State of Colorado and to all persons who have requested to be advised of the intention of the Director of Real Estate to promulgate rules, or to amend, repeal or repeal and re-enact the present rules related to community association managers.

Section 1. Statement of Basis and Authority

Section 2. Scope and Purpose

Section 3. Applicability

Section 4. D Rules – Renewal, transfer, inactive license, reinstatement & insurance

Section 5. Effective Date

Section 1. Statement of Basis and Authority

The statutory basis for the rules titled Rules Regarding Community Association Managers is Part 10 of Title 12, Article 61, Colorado Revised Statutes, as amended.

Section 2. Scope and Purpose

The Director of the Division of Real Estate (“Director”) finds that immediate adoption of this emergency rule is imperatively necessary to comply with state law, including §§ 12-61-1001, C.R.S., et seq., the “Act”) and that compliance with the rulemaking requirements of § 24-4-103, C.R.S., applicable to non-emergency rules, would be contrary to the public interest.

As a result of the passage of HB 13-1277, the Act requires licensing for anyone who engages in certain defined activities of a “community association manager” relating to the management of a common interest community. The legislation empowering the Director to promulgate rules is effective January 1, 2015 and individuals needing to be licensed must do so by July 1, 2015. As a result, it is imperatively necessary that the Director promulgate rules pertaining to the requirements needed for licensure on an emergency basis.

The purpose of this emergency rule is to ensure compliance with §§ 12-61-1001, C.R.S., et seq., and is to effectuate the legislative directive to promulgate necessary and appropriate rules for the implementation of part 10 of Title 12, Article 61.

The specific purpose of the emergency rules is to promulgate rules pertaining to the education, testing, licensing, and insurance requirements needed for licensure.

Without the immediate adoption of the emergency rules, the public’s interest is not served. Wherefore, pursuant to § 24-4-103(6), C.R.S., the Director has stated needs to adopt these emergency rules.

Section 3. Applicability

The emergency rules govern community association managers who are subject to the requirements of Part 10 of Title 12, Article 61 of the Colorado Revised Statutes.

Section 4. D Rules: Renewal, Transfer, Inactive License, Reinstatement & Insurance

D-1) Initial License renewal.

An initial license will be issued for a period commencing on the issuance date and expiring on December 31st of the year of issuance.

D-2) Annual renewal.

The license renewal period begins November 1st of each calendar year and ends December 31st of each calendar year. Licensees who renew their license may only do so if they are compliant with all provisions of the Act and all Director rules.

D-3) Inactive license request.

A licensee may request that the Division’s records show their license inactive until proper request for reactivation has been made, or until their license has expired.

D-4) Inactive license must be renewed.

A community association manager whose license is on inactive status must apply for renewal of such inactive license and pay the regular renewal fees.

D-5) Reinstatement.

A licensee with an expired license may choose to reinstate his or her license. The reinstatement period begins January 1st of each calendar year immediately following the expiration and ends on December 31st of each calendar year. Individuals who reinstate their expired license may only do so if they are compliant with all provisions of the Act and all Director rules. The fee to reinstate will be by payment of the reinstatement fee equal to one and one-half the regular renewal fee. Any person who fails to apply for reinstatement within one year after expiration of a license will be treated as a new applicant for licensure.

D-6) Renewal or reinstatement using method approved by Director.

A community association manager may renew or reinstate their license online or by submitting a renewal or reinstatement application form provided by the Division or by other methods acceptable to the Director.

D-7) Renewal and Reinstatement fees are non-refundable.

All fees paid for the renewal or reinstatement of a license are non-refundable.

D-8) Form and fees required to change license.

No change in license status will be made except in a manner acceptable to the Director to effect such change and upon payment of the statutory fees for such changes.

D-9) Errors and omissions (E&O) insurance requirements.

Every active licensed community association management company and sole proprietorship must have in effect a group policy of errors and omissions insurance to cover all acts requiring a license.

1) Community association management companies and sole proprietorships must obtain errors and omissions group coverage from an insurance carrier subject to the following terms and conditions:

a) The insurance carrier is licensed and authorized by the Colorado Division of Insurance to write policies of errors and omissions insurance in this state and is in conformance with all Colorado statutes.

b) The insurance carrier maintains an A.M. Best rating of "A-" or better.

2) The group policy, at a minimum, must comply with all relevant conditions set forth in this Rule D-9 and the insurance carrier so certifies in an affidavit issued to the insured in a form specified by the Director and agrees to immediately notify the Director of any cancellation or lapse in coverage. Coverage must provide, at a minimum, the following:

a) The contract and policy are in conformance with this Rule D-9 and all relevant Colorado statutory requirements.

b) Coverage for all acts for which a community association manager license is required, except those illegal, fraudulent or other acts which are normally excluded from such coverage.

c) Coverage is for not less than \$1,000,000 per covered claim, with an annual aggregate limit of not less than \$1,000,000. Costs of investigations and defense must be outside of these limits and are subject to their own per claim and aggregate limits.

d) Payment of claims by the provider will be on a first dollar basis and the provider will look to the insured for payment of any deductible.

e) Coverage contains a deductible no greater than \$5,000.

f) That the provider of the policy has executed an affidavit in a form or manner specified by the Director attesting that the policy is in force and, at a minimum, complies with all relevant conditions set forth herein and that the provider will immediately notify the Director in writing of any cancellation or lapse in coverage of any policy.

3) Each community association management company and sole proprietorship applying for licensure, activation, renewal or reinstatement must certify compliance with this Rule D-9 and § 12-61-1004, C.R.S., on forms or in a manner prescribed by the Director. Any community association management company or sole proprietorship, who so certifies and fails to obtain errors and omissions group coverage or who fails to provide proof of continuous coverage directly to the Director, will be placed on inactive status and all licensees operating under such policy will be placed on inactive status:

a) Immediately, if certification of current insurance coverage is not provided to the Director; or

b) Immediately upon the expiration of any current insurance when certification of continued coverage is not provided.

D-10) Crime fidelity insurance requirements.

Every active licensed community association management company and sole proprietorship must have in effect a crime fidelity insurance policy covering the dishonest acts of all employees in the community association management company or sole proprietorship.

1) Community association management companies and sole proprietorships must obtain crime fidelity coverage from an insurance carrier subject to the following terms and conditions:

a) The insurance carrier is licensed and authorized by the Colorado Division of Insurance to write policies of crime fidelity insurance in this state and is in conformance with all Colorado statutes.

b) The insurance carrier maintains an A.M. Best rating of "A-" or better.

2) The policy, at a minimum, must comply with all relevant conditions set forth in this Rule D-10 and the insurance carrier so certifies in an affidavit issued to the insured in a form specified by the Director and agrees to immediately notify the Director of any cancellation or lapse in coverage. Coverage must provide, at a minimum, the following:

a) The contract and policy are in conformance with this Rule D-10 and all relevant Colorado statutory requirements.

b) Coverage is exclusive to covering acts contemplated under the current Act and these Director rules. c) Coverage is for the maximum amount of funds that will be in the custody and control of the community association management company or sole proprietorship at any given time. However, in no event shall any such amount be less in aggregate than two months of current assessments plus reserves, as calculated from the current budget of the common interest community, or be less than fifty thousand dollars, whichever is greater, for each common interest community managed by the community association management company or sole proprietorship. This coverage includes, but is not limited to, any community association management company, sole proprietorship, or designated manager that controls or disburses funds of the common interest community, or that is authorized to sign checks on behalf of the common interest community. Costs of investigations and defense must be outside of these limits and are subject to their own per claim and aggregate limits.

d) Payment of claims by the provider will be on a first dollar basis and the provider will look to the insured for payment of any deductible.

e) Coverage contains a deductible no greater than one (1) percentage point of the total face amount of the policy.

f) That the provider of the policy has executed an affidavit in a form or manner specified by the Director attesting that the policy is in force and, at a minimum, complies with all relevant conditions set forth in these Director rules and that the provider will immediately notify the Director in writing of any cancellation or lapse in coverage of the any policy.

3) Each community association management company and sole proprietorship applying for licensure, activation, renewal or reinstatement must certify compliance with this rule and § 12-61-1004, C.R.S., on forms or in a manner prescribed by the Director. Any community association management company or sole proprietorship, who so certifies and fails to obtain fidelity coverage or to provide proof of continuous coverage directly to the Director, will be placed on inactive status and all licensees operating under such policy will be placed on inactive status:

a) Immediately, if certification of current insurance coverage is not provided to the Director; or

b) Immediately upon the expiration of any current insurance when certification of continued coverage is not provided.

Section 5. Effective Date

This emergency rule is effective January 6, 2015. ⬆



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Tue
 11:30am-
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Lunch & Learn—
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18
Wed
 11:30am-
 1:00pm

Lunch & Learn—
Manager Licensing Quiz Bowl
 Fort Collins

19-20
Thu-Fri

M201—Facilities Management
 Sheraton DTC
 Greenwood Village

24
Tue
 5:30pm-
 8:00pm

HOA Roundtables—LoDo
 Denver Chamber of Commerce,
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MARCH

18-21
Wed-Sat

M100—Essentials of Community
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Sat
 8:30am-
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