



August 2019 - The Sharper Focus - HOA Board Edition


Thank you for reading our newsletter. The goal of this newsletter is to touch on general industry news and helpful topics that may help you in your role as an HOA board member.

Every Association is different in their type, size, scope, and how things are organized and established via the Governing Documents. There are, however, a number of universal topics common to all Associations. We hope you will find this newsletter a valuable source of information!

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Sharper Offers Board Training Opportunities

Sharper Management will present two free Board training opportunities in the coming months. Both sessions will be held at the Bell Plaza office building in Bloomington (3800 American Blvd W). All Board members from community associations managed by Sharper are welcome to attend.



Tuesday, October 15th at 6 p.m. - "Financial Fundamentals and Simplifying Insurance"

This focused session coincides with most association's end-of-fiscal year and insurance renewal seasons. Insurance and financials are always large and complex topics. Led by Sharper's two directors of community management, Candy Lee, CMCA, AMS, PCAM and Josh Reams,

CMCA, AMS, PCAM, in addition to trusted insurance vendor and expert, Eric Skames, of Insurance Warehouse, this session will cover topics such as:

- * Defining Types of Insurance Policies & How they Interact
- * Insurance Claims & How They are Handled
- * Market Place Update

- * Basic Financial Reporting
- * Understanding Operating Cashflow & Reserve Savings
- * Budgeting Process & Methods
- * Replacement Reserve Studies & Requirements

Tuesday, January 14th at 6 p.m. - "Board Basics: An Orientation for Board Members"

This general orientation session will be led by Sharper's two directors of community management, Candy Lee, CMCA, AMS, PCAM and Josh Reams, CMCA, AMS, PCAM. Topics covered will include:

- * Defining Types of "Associations"
- * Roles & Responsibilities of the Board
- * Financial Fundamentals
- * An Overview to Governing Documents & State Statutes
- * How to Run Effective Board Meetings
- * Insurance Basics
- * Property Management Practices

If you are interested in reserving your spot, please email info@sharpermanagement.com

Creating Successful Annual Meetings



For some Board members, the annual meeting can be a source of anxiety. And for many community associations, the annual meeting has become the collective wasteland for complaints, critiques and requests from residents. The first step in creating constructive and beneficial annual meetings is understanding the definition and primary purpose of it.

Definition & Function - Minnesota Statute 317A, Nonprofit Corporations Act, mandates that all corporations with members (which all homeowner associations are) "shall hold at least an annual meeting of members with voting rights." Minnesota Statute 515B, Minnesota Common Interest Ownership Act, mirrors the language, "a meeting of the association shall be held at least one per year."

Perhaps more importantly, though, is understanding the primary role of this meeting. Once again, both 317A and 515B provide context. The fundamental reasons for an annual meeting are as follows:

- (i) an election of successor directors for those directors whose terms have expired
- (ii) a report on the activities and financial condition of the association, and
- (iii) consideration of and action on any other matters included in the notice of meeting.

Put simply, the purpose of the meeting is to vote in board members, approve the minutes from the previous year, and give a brief financial and activities report of the past year. That's it. Rarely are there other items requiring a membership vote. And never should that vote happen unless it is included in the notice of the meeting.

Pitfalls - where many associations might struggle with the annual meeting, it typically comes down to the same reason. The perception is that it is the annual meeting of the members, therefore owners should have a say and a vote on various matters. Many associations have years of precedence that's been set where there is no control and other topics dominate the meeting.

Solutions - first, control and order must rule at an annual meeting. The meeting facilitator, typically the Board President, should open the meeting by stating the expectation that the purpose of today's meeting is to vote in Board members. Other operational business should be

brought more appropriately to an open Board meeting, where action can be taken.

It is so important to recognize section III. of the state statute cited above. "Consideration of and action on any other matters included in the notice of meeting." To reiterate, no other business can be conducted at the annual meeting if it was not included in the meeting notice. Any motion from the membership on this or that could be grounds for an illegal vote. Think about it. What if you choose not to go to the annual meeting because there was nothing listed on the agenda (which is typically the case for an annual meeting) and then you learned that at the meeting the membership voted to raise dues? You probably would have gone had you know that was going to be voted on.

While it might seem counter-intuitive and cold to keep an annual meeting of members very brief and matter of fact, it is important that it be run as a business meeting. If an association wants to use the meeting as an opportunity to hear concerns and have dialog between the board, management, owners, etc., have an open forum session after the annual meeting is adjourned. No minutes. No votes to be taken. Just a forum for dialog. And, once again, try to push those conversations and request to a Board meeting, where action can be taken.

Hopefully a more thorough understanding of the definition and function of the annual meeting, along with the pitfalls and solutions mentioned above, can help your association create more successful and constructive annual meetings going forward.

Sharper Rolls Out Client Care Center

Earlier this month, Sharper Management rolled out a new department designed to streamline communication efforts and increase customer service, and thus increase client satisfaction. The Client Care Center is a "call center" like setup where every call from homeowners, vendors, realtors, insurance agents, etc will receive a live body in the Sharper office. Perhaps more importantly, those staff members answering calls and emails are equipped with the information and tools to satisfy even the most difficult of questions, and to help facilitate resolution on just about any matter.



The reality is an overwhelming majority of the 75 calls received on average each day are very basic questions. Are pets allowed? What is garbage pickup day? How much are my monthly dues? Can you send me a certificate of insurance? All of these questions can be handled by the team of individuals making up Client Care. Such calls and emails need not be sent to a Community Manager or an Assistant Community Manager, interrupting their workflow, or worse, going to voicemail because they are unavailable to take the call or unable to respond to the email quickly. Even more difficult inquires such as maintenance requests (ex: a piece siding blows off) and even vendor service issues (ex: they missed my driveway when they plowed) can be facilitated directly by a Client Care team member.

Finally, another focus and purpose of the Client Care Center is to more thoroughly document communications. Actionable items such as maintenance requests can be put into a Task and our Task system can be better utilized. Call logs can be generated for association reporting purposes - and for important historical documentation record keeping. Overall, better administrative tracking will result from the Client Care system.

"At the end of the day, we recognize this is a customer service industry. We also realize that our overall goal is to help enhance property values for the clients that entrust us with management services for their association," said Matt Froehlich, owner and chief operating officer. "Our goals with the Client Care Center is two-fold. First, it clearly provides an enhanced customer service experience for the nearly 13,000 homes we are responsible for assisting. Secondly, it frees up our Community Managers and Assistant Managers to be working on bigger picture things like building budgets, getting bids, contract negotiations, and enables them to spend more time "in the field" focusing on things such as vendor and project management, site inspections and rule enforcement efforts. The Client Care Center will be a win-win for everybody and we are extremely excited about it."

Client Care is staffed by Sam Crowther, previously having spent the past year as the receptionist at Sharper and comes with a vast background in customer service positions - and Grant Peterson, having spent over a year as an assistant community manager at Sharper and whom

also has significant background in communications and customer service.

Sharper News

Another Successful Sharper Golf Scramble

On behalf of the leadership team and everyone at Sharper Management, thank you for making the third annual Sharper Scramble appreciation golf tournament another success. Despite the 110-degree heat index, nearly 130 Sharper staff members, Board members and trusted business partners came out for a fun day of golf, food and fellowship. The event was held July 19th at Boulder Pointe Golf Club in Elko.



"We put together this event as a way of saying 'thank you' to the many important people that have helped shape Sharper Management to the company we are today," said Dan Cunningham, principal and chief executive officer. "From valued Board members making up our robust client list, to trusted business partners who's quality of work reflects on our company, to the many Sharper staff members that keep this train rolling down the tracks, this event is our way of bringing us all together to celebrate."

In addition to providing a fun afternoon, the Sharper Scramble also has a charitable outreach component, important to the mission and core values of Sharper Management. This year the event helped raise \$2,000 for Open Arms - a local nonprofit that cooks and delivers free, nutritious meals to people living with life-threatening illnesses across the Twin Cities.

If you were unable to join us this year, we hope you will consider being a part of this great event next summer.

Your Feedback Is Important to Us:

As Board members, we truly value your feedback. If you appreciate the work we do for you and your association, we want to encourage you to take a few moments and write some positive feedback and comments via an online "review." Among others, Google, Yelp and BBB are common sources of reviews that pop up on search engines. Please help us establish a review log that is reflective of the excellent service we feel we provide!



Additionally, in the coming month, you will receive a survey to help us better understand our performance for you and your association. This is an annual initiative and we use the information to improve our processes and to incorporate the feedback into performance annual employee performance reviews. Please watch for an email and take the time to share your valuable feedback.

Need Help Renting and Managing a Townhome or Condo?

Think Advantage Home



A sister company to Sharper Management, Advantage Home helps homeowners and investors manage their single-family residences.

Since your Association is already affiliated with Sharper Management, renting your home through Advantage would have extra benefits you wouldn't find in another property management company.

Those benefits include:

- A thorough understanding of Associations
- Information sharing regarding governing documents, rules, and regulations is efficient between Sharper and Advantage Home - Advantage is literally right down the hall
- The Sharper Management maintenance staff is already familiar with your Association's property
- Our emergency response team is fast and effective

If you or someone you know is interested in renting their townhome or condominium, have them contact jeff@advantagehomemn.com.

Learn more at advantagehomemn.com

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