

INFORMATION



Purpose:

To determine the Board's interest in hosting an on-site training "Workshop" for Board members, selected Senior Staff, and Committee Chairs.

Background:

It's imperative for Board members to, not only be informed about issues facing the Association, but be knowledgeable about the Association's governing documents, fiduciary responsibilities, legal constraints and legislative changes they face as part of their association roles. The Association's Directors have the fiduciary responsibility to manage the assets of the Association according to California law, established business practices and principles, and in accordance with competent, ethical and positive community governance. To assist Board members in becoming a more informed fiduciary, it is suggested that the Board participate in a Board on-site training "Workshop" designed to provide up-to-date information regarding legislative changes and best practices concerning Association management. Additionally, participating in the "Workshop" together ensures that every Board member is functioning within the same framework and with the same instructions.

Summary:

Tahoe Donner Board members are now registered with Community Association Institute (CAI) and have access to an extensive amount of on-line content pertaining to association governance. Additionally, the North Chapter of CAI offers an on-site Board Leadership Development Workshop. (See attached description of the course outline).

INFORMATION



In order to host an On-Site educational program, we need a minimum of 15 participants. Along with the five Board members, selected Senior Management and Committee Chairs could benefit from this "Workshop" as well. The fee is \$750 for up to 15 participants, with a cost of \$40 for additional participants.

Prepared By: Bonnie Watkins, Executive Assistant

Board Meeting Date: July 24, 2015

General Manager Approval to Place on the Agenda:

A handwritten signature in black ink, appearing to be "JB", written over a horizontal line.



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Education for Community Association Leaders

The Board Leadership Development Workshop

Education for homeowner leaders just got better. The *Board Leadership Development Workshop* teaches you how to communicate with association residents, hire qualified managers and service providers, develop enforceable rules, interpret governing documents and more. It provides a comprehensive look at the roles and responsibilities of community association leaders and conveys information to help create and maintain the kind of community people want to call home.

FORMATS

The workshop is available in two formats: live, classroom instruction through [CAI chapters](#) and an [online course](#).

COURSE OUTLINE

Whether you live in a condominium, homeowners association (HOA) or other type of community, this workshop highlights what every board member needs to know to serve effectively. The workshop consists of five modules:

- ▶ **Module 1: Governing Documents and Roles & Responsibilities.** To start you on the right path, Module 1 helps you understand the legal authority for your association. It also clarifies the duties and responsibilities of each board member and the professionals who are available to assist the board.
- ▶ **Module 2: Communications, Meetings and Volunteerism.** Module 2 helps you learn how to maximize volunteer involvement in your community association by improving board communications, conducting effective meetings and building community spirit.
- ▶ **Module 3: Fundamentals of Financial Management.** Module 3 introduces the fundamentals of association financial management, including guidelines for protecting your association's assets, preparing a budget, planning for the future and collecting assessments.
- ▶ **Module 4: Professional Advisors and Service Providers.** Because putting together the right team to support your association can be challenging, Module 4 provides practical tips on finding, evaluating and hiring qualified professional advisors and service providers.
- ▶ **Module 5: Association Rules and Conflict Resolution.** Module 5 explores guidelines for making reasonable association rules, enforcing rules fairly and resolving conflict effectively.

TOOLKIT

With your course registration, you will receive a complete toolkit of resources containing:

- ▶ *The Board Member Tool Kit*
- ▶ *The Board Member Tool Kit Workbook*
- ▶ *Community Association Leadership: A Guide for Volunteers*
- ▶ *Managing & Governing: How Community Associations Function*, by Clifford J. Treese
- ▶ *The Homeowner & the Community Association* brochure
- ▶ *From Good to Great: Principles for Community Association Success* brochure

You'll refer to these valuable resources long after the workshop is finished.

RECOGNITION

Community leaders who complete the *Board Leadership Development Workshop* will receive a certificate of completion and [recognition on the CAI website](#).

REGISTRATION AND TUITION

This workshop is an excellent investment for your community association! Associations should consider budgeting association funds to cover registration fees.

Register for the online workshop: CAI members: \$39 | Nonmembers: \$59

Tuition for the classroom course varies by CAI chapter. Visit www.caionline.org/chapters for details.

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