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THE PRESIDENT'S REPORT

As we end 2020 and start 2021, I just wanted to express my gratitude for each CAI member and colleague. We attended a handful of meetings before COVID changed our way of life in the Panhandle. As I look back at the year, I celebrate the good things: a brand-new website for our chapter that is interactive and updated; reaching 400 members; CAM Education Day in August (nearly 180 hours of CE distributed); our first September Virtual Lunch; a successful Annual Charity Golf Outing in October; a return to in-person lunches in November and a fun December Holiday Party!

A special **Thank You** to our 2020 Chapter Sponsors who stuck with us and helped to sustain this Chapter during these difficult times. We appreciate your support and promise to make 2021 a value-filled year for all our new and renewing sponsors.

Your 2020 Board of Directors, while trying to prepare and plan for their

own work life during COVID, helped to maintain the direction of the Chapter. We may not have offered the most webinars or virtual events, but we worked hard behind the scenes to keep our members safe. Cancelling/postponing events was the result of a decision by your Board. In the end, we did what we felt was best for the membership. Looking ahead to 2021, we are slated for a full return to in-person events, while still practicing COVID safety precautions. We hope to continue to build on the foundation of networking, business opportunities and educational resources for our members.

None of the above could have been possible without the amazing fortitude of our chapter executive director, Kathy Barber. We are truly blessed to have had her join us in 2020! I am looking forward to this year's President, Mr. Danny Ellis and of course support him, the chapter, and every member that I can in 2021.



Patty Campbell
Chapter President

I want to say a special thank you to our departing board members Cindy Russell and John Townsend, it has been an absolute pleasure serving with you both.

Patty Campbell
President

Upcoming Events

Please visit our website at www.cai-ngcc.org to learn about our upcoming events. Pre-registration is required for most events. If you are logging in for the first time, your email is your username. If you have any questions, please contact Kathy Barber at (850)797-3472.



HOW TO KEEP YOUR HOA HEALTHY

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by Beth Gilbert

Beth Gilbert is the senior director of the community association market at AppFolio. Gilbert brings over 15 years of product experience to AppFolio and is currently responsible for developing the vision and strategy for the community association market.

Managing the daily operations of a homeowners association can make it hard for board members and community managers to carve out time to evaluate the health of their association. Though it may be one more thing that goes on the to-do list, knowing your community's financial standing, curb appeal, and the relationship with residents is well worth the time and effort.

Board members have the responsibility to preserve, protect, and enhance homeowners' property while community managers coordinate and execute the services needed to run the association, also acting as trusted advisors to the board with their vast knowledge of governance, operations, and management. It's critical for board members and their community managers to partner and leverage each other's strengths and skills to assess the health of their association and execute a plan of action.

There are five areas to evaluate. During the process, community managers and board members should create a spreadsheet to take detailed notes that enable them to quickly turn findings into a plan to share with residents.

Home values. Residents want to ensure the value of their home is maintained when choosing to live in an association. Conduct research to review property values in the community. Have they gotten higher or lower in recent months, or do they seem steady? This data can easily



be collected through websites such as Zillow, Redfin, and Trulia, which make it simple to compare home prices in the area. While home values may be in great shape, that's only a small piece of community health.

Curb appeal. Tying into the value of homes is the physical condition of the community, which is one of the simplest things to assess at a glance. Does the community look like a place people are proud to call home? Are trash bins being put away, yards well-trimmed, and common spaces clean? Fresh paint, clear walkways, and clean and safe [common areas](#) are critical to the overall look and feel of the community.

If this is not the case, think about increasing communication about rules and boosting violation notices. The beautiful look and feel of the neighborhood is one of the reasons people choose to live in associations in the first place.

Proper budgeting. [Budgets](#) are crucial to a homeowners association's financial operation. Homeowners can tell when things are off if monthly assessments increase at an alarming rate or if a special assessment is approved to cover budget shortfalls. Similarly, high delinquency rates also may be a red flag that the association is not getting the funding it needs to cover expenses.

While considering regularly occurring costs, it's essential to plan for future projects, as well as those unexpected line items that may creep in, which brings us to reserve funding.

Reserve funding. Are your community's reserves adequately funded? Do you follow regional rules and regulations regarding the frequency of reserve studies? If a large, unexpected project arises, can you cover it? Homeowners are ever fearful of hearing that they may have to pay a considerable special assessment for

Continued on page 3

Continued from page 2

a project that should have been planned for. Inadequate reserve funding also may keep potential homeowners from buying into a community.

Large-scale projects that do not occur every year should be budgeted for in advance to avoid assessment increases when the time comes to replace components. Take a look at the estimated years left on each component in your community and the percentage funded to date. For example, if your community needs the roof replaced in five years knowing that roofs must be replaced every 20 years, reserves should be 75% funded.

Reserve studies can be complicated; associations should rely on a reserve specialist to help. It's well worth it in the long run.

Community culture. Does the board and the community manager have a good pulse on homeowners' views of the

association? Is there a strong relationship with homeowners, or is the only contact with them when something is wrong? If so, it might be time to start some positive outreach to make them feel more connected to the community.

Ensure that you're engaging with residents by the means that they prefer, such as via email, social media, or text messages. Make sure there is two-way communication so homeowners can ask questions and feel like part of the bigger picture in the association. Holding events outside of regular board meetings also is a great way to get people together and talking as a community. Events like summer potlucks, spring mixers, and volunteer appreciation parties help build connections between neighbors, the board, and the community manager.

Board members should partner with their community managers to develop a health assessment report and a plan of action to get their communities back on track, if necessary, or identify areas for

improvement. It's not going to happen overnight, but if you take it one step at a time, you will get there.

Start by tackling the low-hanging fruit, such as reviewing home values and determining the general physical condition of the properties and common areas. Then start chipping away at the more labor-intensive tasks like budgeting and reserve funding. Set a goal to get the community in better shape within a year,

and also set regular reminders—perhaps quarterly or biannually—to update the board and homeowners on how far a large-scale project has come toward completion.

Healthy associations have informed board members, knowledgeable community managers, and engaged homeowners who are happy and confident in the management of the place they call home.

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PROLONGING YOUR POND'S RETIREMENT

PROACTIVE SOLUTIONS TO HELP EXTEND THE LIFESPAN OF YOUR WATERBODY

by: Gavin Ferris, Ecologist

The very first fish I remember catching was a bullhead catfish. It was in a small pond in my grandparents' HOA community that is still there today. Well, sort of. Though the pond had once been deep enough for fishing and stormwater collection, its depth is now best measured in inches rather than feet. The cattails that were once clustered near the outflow are now abundant throughout the pond. Today, the waterbody resembles the nearby wetland more than it does a pond. In the 55 years of its existence, no measures have ever been taken to mitigate against the process of succession.

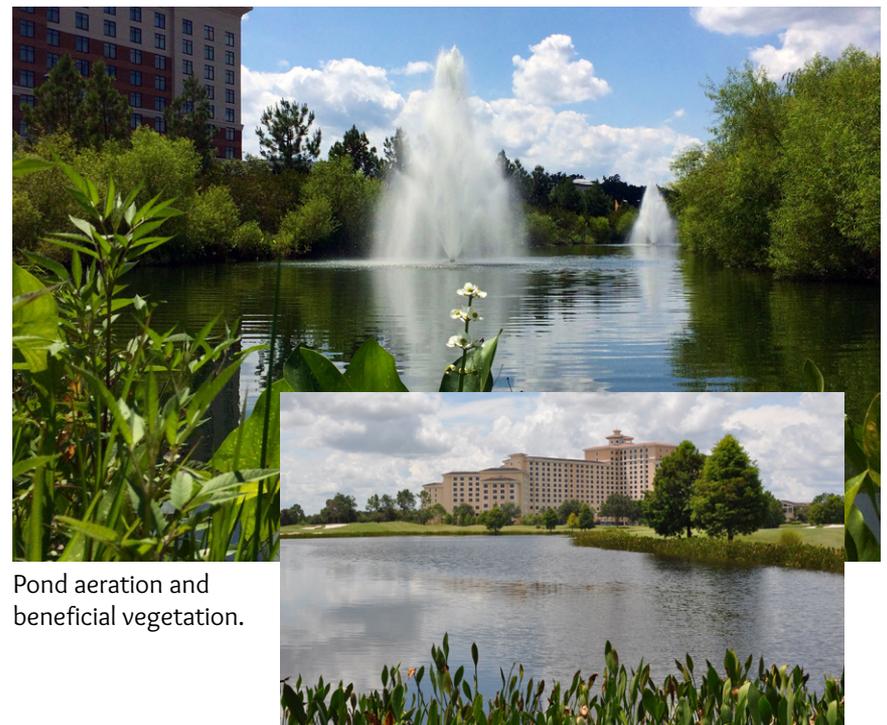
Lake and pond succession is the natural lifecycle of any waterbody. The very tributaries that supply a waterbody with its water also carry sediment, which over time accumulates and decreases the water depth. Aquatic weeds and

nuisance vegetation decompose and create additional organic sediment. And the shallower the pond becomes, the more vegetation it produces—accelerating the aging process.

The speed at which a lake or pond becomes a marsh depends upon several different factors. Some of these factors can be controlled; others can be mitigated. But it is a future that all waterbodies will face at some point in their lifespan. This is why proactive management is not only beneficial, it's key to preserving the health, function and beauty of our freshwater resources.

A common tool recommended to HOA communities is a beneficial vegetative buffer comprised of native flowering plants and grasses. A vegetative buffer that is allowed to grow 3-5 ft out from the shoreline can help significantly

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Pond aeration and
beneficial vegetation.

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reduce the amount of surface runoff, sediment and pollution entering a lake or pond during rainstorms. Establishing similar erosion controls around streams and tributaries is also a wise precaution against transported sediment. Organic matter accumulation can be further prevented in the waterbody by applying nutrient remediation products, which process excess nutrients before they can be used to fuel algae and aquatic weeds, and introducing supplemental bacteria and enzymes, which aid in the decomposition of vegetation and bottom muck.

Another consideration relating to decreased water depth is the increase in temperatures. Shallower water warms faster, leaving it prone to excess algae growth, increased submersed and emergent vegetation growth, and oxygen depletion. Lake and pond aeration can help mitigate these issues and help slow the accumulation of organic matter. Beneficial dissolved oxygen can be

produced by several types of pond aeration systems, which your aquatic management professional may recommend depending on your goals and the characteristics of your waterbody. Floating fountains provide effective circulation in shallow ponds, while submersed aeration systems oxygenate deeper waterbodies from bottom to top. And new technologies like nanobubble aeration treatments can be used supplementally alongside these systems to provide additional natural benefits, including toxic cyanobacteria control and the elimination of pollutants while encouraging the growth of native wildlife and vegetation.

Eventually, the line between a pond and a wetland becomes a little blurry; after all, a wetland without vegetation is, well, just mud. Some forms of vegetation, like cattails and Phragmites, not only thrive in late-successional ponds, but actually speed the rate at which succession occurs, so removing these nuisance plants is especially important. At the same time, it is just as important to establish and



Unhealthy shoreline.

promote healthy native wetland plants in order for any form of aquatic ecosystem to persist. The species best for your situation will depend on your location and your ultimate aesthetic and functional goals.

One concern I often hear from community managers, especially those with aging ponds and shallow stormwater retention areas, is the production of mosquitoes. Certainly, shallow productive habitats are more conducive to mosquito breeding than are open water ponds. As long as sufficient water remains to sustain them, a population of fish, even minnows, will prevent mosquitoes from proliferating. Amphibian and insect predators like salamanders and dragonflies are also adept at controlling mosquitoes and can be promoted with appropriate native vegetation.

Proactive management strategies can be incredibly impactful in community waterbodies, especially when introduced early on in the lake or pond's lifespan. Eventually, though, decisions must be

made about the future of a waterbody. For stormwater basins and other ponds that must meet design specifications in order to fulfill their intended function, sediment removal or dredging may eventually become a requirement. While dredging can be a tremendously expensive endeavor, a well-designed custom management plan that includes strategic hydro-raking can help prolong the need to dredge by 10 years or more and will allow your community to plan for the expense gracefully.

Aging is inevitable, even for your waterbody. It is up to us to decide if and how to intervene in that process.

Gavin Ferris is an Ecologist at SOLitude Lake Management, a freshwater management firm that provides sustainable solutions for lakes, stormwater ponds, wetlands and fisheries. Learn more about this topic at www.solitudelakemanagement.com/knowledge.



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TIPS TO AVOID COMMON BOARD MEMBER MISTAKES

by Robert Begley

Bob Begley, CAM, CMCA, AMS, is a managing partner and instructor at Florida CAM Courses, LLC., which offers training and exam prep for becoming a Community Association Manager.

Serving on the board of a homeowners association can be a fulfilling experience. Many members enjoy being active volunteer leaders, assisting neighbors regarding association matters, and getting to know their community better.

Most [board members](#) take their position seriously. However, there are a fair number of potential pitfalls and possible liability issues if a board

member isn't careful. For these reasons, it can be a huge advantage to work with a [community association manager](#) who can help board members avoid snags and ensure the association runs smoothly.

Here are some of the common mistakes association board members should avoid.

Holding meetings incorrectly

All board meetings need to be documented and with notice given to all homeowners. It is considered a board meeting any time a majority of the members get together and speak about association business. Often board members may get together for



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Hand Arendall Harrison Sale's Community Association Law Practice Group is one of the largest in the Florida Panhandle with offices in Panama City, Panama City Beach, Destin, and 30A and throughout the state of Alabama. Our team includes attorneys who have been Board Certified by the Florida Bar in Condominium and Planned Development Law and in Business Litigation, possessing more than 25 years of combined experience in representing and defending community associations. Under the supervision of these attorneys, the operations of the Practice Group are managed by a Florida Licensed Community Association Manager.

Our team of attorneys represent condominium and homeowner associations, guiding them through day-to-day governance of their respective communities, including assisting the board and management in meetings, elections, document drafting and amendments, contract negotiation and enforcing covenants and restrictions, collections and providing legal advice about governing documents and Florida law and employment matters. Our experienced litigators are able to effectively and efficiently navigate our clients through the litigation or alternative dispute resolution process to achieve a positive resolution

for the community. Our attorneys regularly serve in leadership positions throughout the community, engage in public service and provide educational services to community associations and management companies through Board Certification Training Courses, continuing education programs approved by the Florida Department of Business and Professional Regulation and partnership events with the Community Associations Institute ("CAI"). Our attorneys and staff have been longtime volunteers and supporters of the North Gulf Coast Chapter of CAI and it is our privilege to continue to serve the Chapter and its members.

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Continued from page 6

a casual lunch or similar gatherings and talk about board business, not realizing this could be a violation of association law. Talk with your community association manager to help clarify what is OK to discuss with other board members when no official meeting is taking place.

Not adhering to the governing documents

Sometimes boards do not carefully read the community's governing documents, and then fail to abide by them. This can happen if a new board is elected and they neglect to review the declaration and bylaws of the association. This is usually unintentional, but it can cause a lot of issues. Every board member should read the bylaws and all other association documents.

Mismanaging association funds

It is all too easy to use bad judgment when it comes to managing association funds. A common mistake is to spend too much too quickly without leaving anything for emergency maintenance or repairs. Board members also should consider long-term finances. While a board may want to use funds on things that may seem important in the short term, it is imperative to think of the community's future needs. It would be wise to go over prior-year budgets and learn from them. Community association managers can provide guidance and advice throughout the budget review process, and ensure work is done at a reasonable price.

Becoming overzealous

Board members are generally excited to be in their position, and often they can make big decisions too quickly. It is always best to weigh any major policy changes carefully. For example, a new board may decide to change vendors, believing it is in the association's best interest, but in doing so will lose momentum on all ongoing projects. Take time to speak to your community association manager, and if you are unhappy with someone, then he or she can give you advice about better vendor contracts as well as how to make changes within the community.

Not seeking legal advice

You will find there are situations where legal advice should be sought after. Community association managers are not lawyers and are prohibited from offering legal advice to their clients. If you are dealing with a situation with a homeowner that could possibly turn into a lawsuit, it may be best to work with the association's attorney for advice and procedure. Consider that the expense of the attorney may well be far cheaper than the potential legal liabilities.

Being a board member is a tremendous responsibility and requires important decision-making skills and judgment. It can be easy to make common mistakes that can cause significant issues in the future. Maintaining a good relationship with your community association manager is an excellent way for your community to operate efficiently



8 WAYS DUNE MAINTENANCE DIFFERS FROM LAWN CARE

Thriving landscapes are often the result of careful planning and consistent maintenance. Coastal property owners have stewardship over two outdoor areas: their recreational yard and their protective dune ecosystem. Even if there are a few similarities to how these environments are best cared for, the differences are numerous and need to be addressed in two separate environment-specific plans. Here, we compare seven major aspects of what we call the **white landscape** (dune ecosystem) to the **green landscape** (manicured yard planted in composite soil).

1. Purpose: Resiliency vs. Leisure

White Landscape: Dunes are natural barriers that can help absorb the

impact of storm surge and protect coastal properties from storm damage.

Green Landscape: Backyards offer space for leisure, beauty, exercise, and pet use.

2. Return-on-investment:

Both are huge!

White Landscape: Every \$1 invested in building hurricane protection reduces a property's average loss exposure by an estimated \$105.

Green Landscape: A well-manicured and maintained yard can increase property value by 28%, according to landscape economist John Harris.

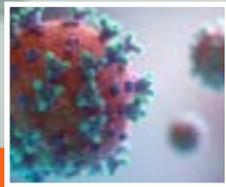
3. Root Depth: Long vs. Shallow

White landscape: Dune-building

Continued on page 9



After Hurricane Sally eroded the entire dune at Sandcliff Condominiums, Dune Doctors replenished the sand to construct a new berm. Above, our field team stabilizes the sand placement with sea oats.



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vegetation has evolved to develop impressive root systems. Individual plants have 40 to 50 roots that can each grow upwards of 25ft long. The result is vast, interconnected root webs that grow deep into the core of the dune. This root mass allows the plants to capture the limited water and nutrients available in the coastal environment.

Green landscape: Most turf grasses can develop roots that are 6-12 inches long. Frequent irrigation does not encourage deep root growth.

4. Soil Composition: Sand vs. Composite Soil

White landscape: Coastal soil tends to have high salinity (salt count) and is nutrient-deprived. Only a few resilient plant species can grow in it.

Green Landscape: Yards typically comprise a composite, nutrient-rich soil that can foster a wide range of vegetation.

5. Irrigation: Drought Tolerance vs. Daily Water Dependence

White Landscape: Routine irrigation heightens dune erosion risk. Before killing the vegetation through rot or disease, the excess water causes the dune-building plants to develop shallow roots. Shallow roots cannot stabilize loose sand, compromising the integrity of the dune. [Continue reading about dune irrigation.](#)

Green Landscape: Yards benefit from daily irrigation, especially during the extended periods of drought regularly experienced by the Gulf Coast.

6. Fertilization: Dune-specific vs. Basic

Any landscape that hosts a variety of plants and trees needs nutrient-rich soil. However, fertilizer is a chemical that, if applied incorrectly, will pollute the environment. Regardless of where the application is made, you should always seek the advice of an expert.

White Landscape: The snow-white sand of the Eastern Gulf Coast is made of quartz crystals. Quartz crystals are incredibly smooth and unable to hold on to nutrients, therefore, the application of coastal-specific, slow-release fertilizer is recommended twice a year. Using a basic fertilizer is insufficient because the nutrients will be washed away before the plants can absorb them. [Continue reading](#)

[about proper dune fertilization.](#)

Green Landscape: Fertilizing a yard may require a similar application frequency, however, it is the type of fertilizer used, not the frequency, that will result in the most notable difference between healthy and malnourished plants.

7. Pruning: Illegal vs. Legal

White Landscape: Unpermitted removal of native coastal plants may result in legal consequences and weaken or erode the dune. Dune Doctors promotes pruning and dethatching (removing dead plant material) to stimulate plant growth. However, to protect dune ecosystems from further erosion, governmental agencies from the local to federal levels regulate all efforts to clean or enhance the dune vegetation. [Continue reading about dethatching.](#)

Green landscape: Mowing and pruning can stimulate growth while minimizing invasive species.

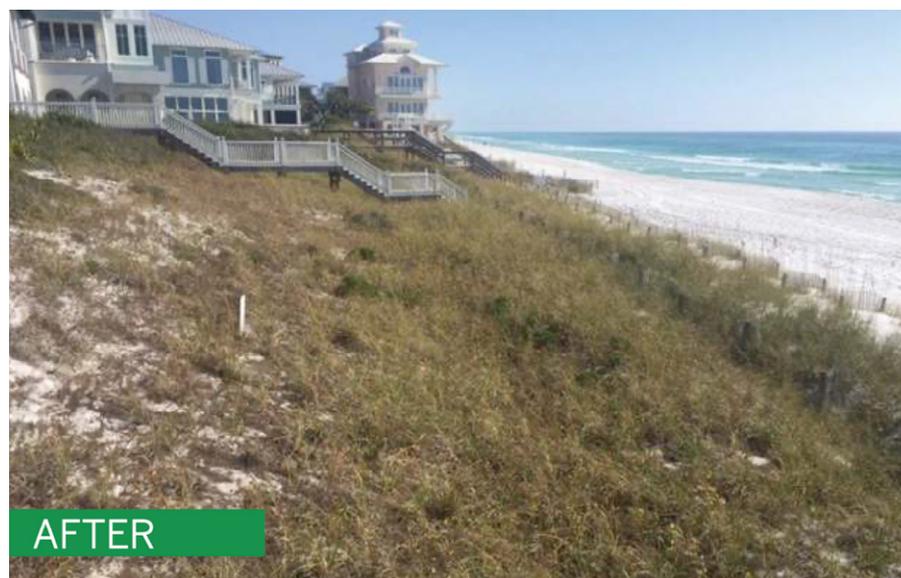
8. Permitting: Strong vs. Moderate Government Involvement

White Landscape: Because dunes provide coastal communities with protection from storm surge, the land south of the coastal construction line is protected. An individual must obtain permits and special qualifications before implementing any restoration.

Green Landscape: Government involvement in landscaping hinges on whether the project is seaward or landward of the coastal construction line. Anything seaward of the CCL requires a coastal restoration expert who understands the complexity of both the regulations and the fragile environment's needs.

WHAT DOES A DUNE MAINTENANCE PROGRAM ACCOMPLISH?

A dune maintenance program should help protective berms stabilize and provide season-specific care for your coastal vegetation. Like lawn care, dune maintenance revolves around sustaining an environment that supports and nurtures plant growth. Dune Doctors' maintenance program removes built-up dead plant material, invasive plants, and weeds to protect the dune-building plants from being suffocated or having to compete for food. Furthermore, our



routine fertilization provides the plants with the nutrients necessary to sustain healthy root growth, thus accelerating the dune's development. This ongoing care nurtures massive root systems that anchor your dunes in place and defend your coastal property from storm surge. [For a success story about a property that managed to accumulate \\$180,000 in free sand in part due to the implementation of our maintenance program, click here.](#)

Transforming a Dune into a Lawn may Lead to Hefty Fines

With these eight points in mind, let's take a look at a scenario where lawn specific care was applied to a coastal dune. Earlier this year, nearly three-dozen Newport Beach, California

homeowners illegally landscaped lawns on the beach. The consequences amounted to roughly 1.7 million dollars in fines due to encroachment on public beaches and destruction of the protected dune environment. A manicured lawn is aesthetically pleasing. However, as easy as it may have become for these homeowners to walk to the beach, they also created a smooth path for high tides and storm surges to flood their waterfront homes. With these Newport Beach homes in mind, before requesting a lawn care service that does not specialize in coastal restoration to perform any work on your dunes, consider the high likelihood that they may damage the protected ecosystem, resulting in financial penalties

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for you.

Helpful Sources:

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"Mountain View Landscaping & Design, Inc. 'Creating Landscapes of Timeless Beauty.'" Mountain View Landscape WNC, www.mountainviewlandscapewnc.com/does-landscaping-increase-home-value



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BOOSTING ENGAGEMENT

by Joe Cantlupe

Reprinted with permission from the January/February 2020 issue of *Common Ground*TM magazine, the flagship publication of Community Associations Institute

(CAI). www.caionline.org/cg

Community associations are trying everything to fight owner apathy—from old-fashioned methods to online tools and services.

FOUR YEARS AGO, the Cactus Park Estates Homeowners Association in El Mirage, Ariz., was struggling to meet quorum and get enough residents to vote at its annual meetings. When not enough people in the 615-home community participated in the election, the incumbent board would give up and extend its tenure for another year.

“Things were going well or OK. There were no major issues. Nobody really cared,” says Korin Parry, CMCA, AMS, president of Mesa, Ariz.-based Preferred Communities, Cactus Park Estates’ community association management company. A sense of apathy had taken hold.

Country Place Community Master Association in southwest Phoenix seemed ripe for enthusiasm from its residents, ranging from millennials to baby boomers across 673 homes, but it struggled too. “Apathy was so strong,” says Bill Bates, CMCA, AMS, community manager at Country Place. “We would have a homeowners meeting and barely 10 people showed up.”

Apathy rings too loud across the community association landscape.

For the community association residents who keep tabs on every document, financial statement, how many flowers are planted, or whether too many dogs are barking after sunset, there may be many more who don’t have any interest in what goes on and don’t bother to attend meetings or vote in elections.

“Apathy is infectious,” observes Sarah E. Merkle, an associate attorney with Bradley Arant Boult Cummings in Birmingham, Ala. “If people aren’t invested, it’s going to

be hard to attract their interests because they are pulled in so many different directions.”

To combat the problem, community associations are trying new and technology-based solutions that simplify voting, facilitate communication, and make it easier to receive feedback. They’re also revisiting tried-and-true techniques, such as potlucks and seating arrangements.

TALLY UP

Annual and special meetings require homeowner involvement to vote for new board members, assessment increases, capital improvement projects, and amendments to the association’s governing documents. The goal is to reach a quorum—a minimum number of members who must be present before actions can be taken. Without a quorum, work is stalled, and expenses go up.

Many community associations are turning to online voting because of its convenience, hoping it will increase the likelihood that homeowners participate.

Cactus Park Estates opted for online voting in 2016. Since then, it has managed to reach beyond 20% voting returns, which Parry says was significant. “We have met the quorum every year since starting online voting. Before that, we went door to door for the annual meeting and made (quorum) by one or two votes.”

The big difference? “It’s easy to go to your computer, enter your account number, and vote right there,” she says. “Not many people want to go to the post office and pay 55 cents for an envelope to mail in a ballot.”

Another community association managed by Preferred Communities recently held a vote to amend its covenants, conditions, and restrictions. Three-quarters of its 259 homeowners voted ‘yes’ within 30 days—the majority doing so online. Parry says that at least half of the 31 associations that Preferred Communities manages have moved to online voting.

Large communities, in particular, are contracting with companies that

specialize in tabulating online votes more quickly and accurately than paper ballots, although the latter are still required by governing documents for those who prefer casting their vote in person or by mail.

At Country Place, homeowner leaders decided it was time to embrace online voting to accommodate its residents who were too busy to cast a paper ballot, says Bates. The board hired an elections services company that provided a mobile voting app and sent email notices to the community about the change before the upcoming vote.

Bates says that without online voting, the community wouldn’t have reached quorum. “It was tremendously important to try a new concept.”

Although certainly easier and more efficient than paper ballots, ensuring the accuracy of online votes is critical. “You’ve got to validate that John Smith voted and track that,” Bates says, adding that Country Place did a test run before the election to determine that all the votes would be tallied correctly.

By the numbers, Bella Vista Property Owners Association, in Bella Vista, Ark., is huge: 14,100 homes, condominiums, and timeshares across 36,000 acres. That became significant when the community had to send out around 29,000 paper ballots to all residents during a typical election and required a large number of volunteers to manually count them.

“You can imagine a volunteer group trying to wade through that. It’s impossible,” says Tom Judson, CMCA, AMS, LSM, PCAM, chief operating officer and president of Bella Vista Property Owners Association. “We felt like it was no longer a reasonable way to do that.”

Bella Vista implemented online voting in 2016, contracting with a third-party election services company to provide tabulation to ensure the accuracy of the process and that no volunteer or homeowner leader would tamper with votes, says Judson.

“The online voting was not through an

app, but you could vote using a mobile device,” he explains. “We also sent out paper ballots because it is required by our governing documents.”

Before online voting, homeowner participation at Bella Vista was good—between 20 to 30%. Since then, voter participation has gone up to 50%, Judson says, and has resulted in savings for the association due to fewer paper ballots being printed. “I think we’re going to have a record turnout for everything we do.”

SURVEYING THE SITUATION

While some communities are hesitant to embrace electronic voting, they aren’t shying away from using online tools to improve homeowner turnout.

For years, Summerfield at Taft Hill, a 55-and-older condominium in Uxbridge, Mass., had a refrain not unlike others: Not enough residents in the 130-unit community were showing up to constitute a quorum. “Some years, that was the most significant issue,” says Pat Stephan, treasurer and past chairman of the association’s board.

Many homeowners at Summerfield remain reluctant to use social media or other online tools, but the board wanted to do something to beef up attendance at board meetings. It set up an online poll to gauge potential voter involvement in upcoming elections and also to prepare to gather proxy votes, says Stephan.

By getting an idea of prospective attendees at meetings or voting, the community receives a heads-up on who may or may not be participating and what to do about it. Then, they finish the job the old-fashioned way. “We knock on doors and alert owners about a meeting,” Stephan notes.

The community hasn’t yet implemented online voting, but that may change in the near future. “We passed an amendment to allow electronic voting,” Stephan says. “We talked to the attorneys and got the blessing to change our bylaws.”

PHONING IT IN

For many communities, having

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conference calls through apps allows them to have participation from people who live outside the community or are on the road.

Allie J. Richardson, vice president of Seaton Place Homeowners Association in Louisville, Ky., is also a resident of another homeowners association out of state in San Antonio. Conference calls have been important for him to keep abreast of issues in both communities.

“We use the free conference call when we can and send a report by email,” Richardson says.

In his leadership role, he has shared documents with others once the meetings are over.

For Dave Norton, CMCA, AMS, owner of Spectrum Management Associates in Sedona, Ariz., conference phone calls have been particularly useful because many owners also are scattered throughout the country.

“There are a lot of seasonal homes and homeowners aren’t physically there,” says Norton, whose company manages about 700 single-family homes, condominiums, townhouses, and a business association. Using the phone service has definitely increased the number of participating owners, he adds. “It’s not to the level of 80 or 90% of the owners, but it has definitely improved.”

ELECTION LAWS

Laws governing community association meetings and elections are broad and “vary tremendously” from state to state, says James Slaughter, managing partner with Black, Slaughter & Black in Greensboro, N.C., and a fellow in CAI’s College of Community Association Lawyers.

Community association leaders should closely monitor what’s allowed and what isn’t. Selecting a voting method—such as online—also depends on the community’s bylaws.

“The newer laws talk about video conferencing and electronic conferencing. They are going to be different. Keep in mind it is not a one size fits all,” notes Slaughter, who is a professional registered parliamentarian, a past president of the American College of Parliamentary

Lawyers, and has written two books on association meeting procedures.

Florida, for example, permits online voting, but California prohibits it. In addition, changes to the election process for community associations in the Golden State that went into effect Jan. 1 will require more steps upfront before elections can be held (Read more in Homefront). “There will be more hoops to jump through,” says Christina Baine DeJardin, an attorney with the Delphi Law Group based in Coachella Valley, Calif.

ENGAGING ONLINE AND IN PERSON

Board members and attorneys emphasize the importance of community engagement—whether it’s electronically or face to face.

Jackie Grant, a resident at the 52-unit River Bend Condominium Association in Cocoa Beach, Fla., says her beach-side community encourages involvement from far-flung property owners through video conferencing. But it is also organizing events that will continually instill enthusiastic responses, whether it’s potlucks or holiday get-togethers. “Food is always an important item” to bring the community together, she says.

Some experts suggest small changes can entice more participation and voting. For instance, board meetings can be rearranged to have board members seated in a circular manner instead of just facing the audience. Residents will feel more included and heard. Other events can be held around election time to increase interest in voting, such as community walks, cleanups, or informal gatherings.

In addition, community associations can test out their engagement via social media or email blasts to “take the temperature of your community and figure out what’s going to work,” advises DeJardin. It’s also about creating a balance in the type of content the association puts out. “Sometimes boards focus on negative news and don’t concentrate on positive events. Publicize the successes,” she says.

As much as online tools and services can help reach quorums and increase engagement, community associations should continue to push in-person meetings and events. They help build a stronger sense of community that can’t be

obtained through technology.

“The downside of all this (technology) is the moving away from the town hall model,” Slaughter warns. “(In an in-person meeting,) you can talk about issues with your neighbors instead of having a knee jerk reaction electronically.”

Joe Cantlupe is a freelance writer in the Washington, D.C., area.

NAVIGATING QUORUMS AND PROXIES

MANY COMMUNITY ASSOCIATIONS STRUGGLE to meet the minimum number of homeowners or the amount of proxy votes necessary before quorum can be achieved at annual meetings. James Slaughter, managing partner with Black, Slaughter & Black in Greensboro, N.C., explains some of the key distinctions of quorum and proxies.

Quorum refers to the number of members who must be present at a meeting for business to be validly transacted. The legal definition of a quorum in a community association can be drawn from a state statute, governing documents, or a parliamentary manual. Quorum applies to the number of members present, not to the number voting on a particular issue, says Slaughter, who is a professional registered parliamentarian, a past president of the American College of Parliamentary Lawyers, and has written two books on association meeting procedures.

“No votes should be taken in the absence of a quorum,” he adds, although there are exceptions. “Some state statutes provide that certain acts, such as some budget ratifications, do not require a quorum.”

When homeowners can’t attend a meeting in person, the community association should work vigorously to garner proxy votes to achieve quorum. Generally, proxy is a power of attorney given to another to vote in the member’s stead. By statute, proxy voting is often permitted in for-profit corporations and community associations. Typically, the association’s governing documents will outline who can serve as a homeowner’s proxy, such as the board president, treasurer, or community manager.

Slaughter provides an example: “If I give my proxy to Mary Smith, Mary can attend

the meeting and participate on my behalf. But if Mary misses the meeting, it’s as though I’m not at the meeting. Only by Mary attending the meeting does my proxy matter.”

There’s a bit more to proxies. For instance, proxy voting is almost universally prohibited in board meetings because a board member can’t give away their responsibility to another director. “If proxy voting is permitted, the rules should be carefully followed,” Slaughter adds.

There are five different types of proxies:

- **General proxy:** The holder of the proxy has the discretion to do whatever he or she wishes at the meeting.
- **Limited proxy:** The holder of the proxy can only vote on certain issues at the meeting.
- **Directed proxy:** The holder of the proxy can only vote as directed.
- **Limited directed proxy:** The holder of the proxy can only vote on certain issues as directed.
- **Quorum proxy:** The proxy only counts for purposes of obtaining a quorum and nothing else.

Proxy forms can be mailed to homeowners to be filled out but should not be dropped off before the meeting. Instead, they should be given to the person named as proxy who will attend in an owner’s place.

According to Slaughter, Robert’s Rules of Order specifically warns against voting procedures where votes from those not at a meeting are combined with those in attendance. “Unlike members at the meeting, those who have previously voted cannot adjust their votes to take into account debate or proposed amendments,” Slaughter says. —J.C.

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Annual Golf Charity

BENEFITING

Habitat for Humanity

photos & story by **Zhalman Harris**

The local chapter of Community Associations Institute held their annual Charity Golf Tournament to benefit Habitat for Humanity and educational scholarships for community association managers on October 30 at the Indian Bayou Golf Club in Destin. Golfers enjoyed a Halloween themed golf outing with over 30 sponsors and dozens of volunteers helping to make the day a great success. The title sponsor was Giant Enterprises who provided swag bags for the attendees. The Food Truck Dinner with Stanley Street Treats provided by CompleteDKI and FirstService Residential was a big hit. Players enjoyed the Margarita Bar sponsored by Community Management Associates and a delicious deli lunch courtesy of Harrison Contracting Company. The Beverage Cart was provided by Burg Law.

The North Gulf Coast Chapter is one of 66 Community Association Institute chapters worldwide. Membership includes professional community association managers, association volunteer leaders (homeowners and community association board members) and business partners that serve these associations. Member services provided by CAI Headquarters include conferences, education courses, periodicals, books, professional service directories, legislative and regulatory advocacy, professional designations, and more.



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CAM'S CORNER

GETTING TO KNOW OUR COMMUNITY ASSOCIATION MANAGERS

An Interview with Hannah Bowyer, LCAM, CMCA

How did you start your CAM career?

I moved to Florida in 2012 and was exploring job options in this area and one was available at an association management company. I have a passion for jobs that involve people, communications and problem solving, so this career option seemed perfect. My prior job of event planning and publications also seemed to compliment this career. I have been with the same management company since moving to Florida.

What was one of your favorite communities to manage and why?

Compass Point at WaterSound Beach. I started off as an Administrative Assistant with FirstService Residential (then known as The Continental Group) and once I had my Florida license, I was assigned a portfolio that included Compass Point as one of the associations. The board president at the time welcomed me even though I was newly licensed and had been their admin assistant prior. In the past eight plus years I have had other communities come and go but have always kept this one in my portfolio and felt a special connection to the location, property, owners and board. They have been with me every step on my journey as I've grown in this career. Am grateful that in my brand-new role as Regional Director, they will still be in my area.

What was one of your biggest challenges as a CAM?

I want to fix everything for everyone. But that is impossible and have had to realize that I can't make vendors show up, I can't solve every complaint (such as please keep red tide from coming this year!) but I can do my best and know when to ask others for their advice or assistance.

How was CAI helpful in your career?

The networking has been helpful, as well as the training opportunities. In December of 2018 I took my CMCA test and passed it. Adding to both my knowledge base and credentials.

If you could retire today, how would you spend your time?

Traveling. I've been to more than 12 countries, including Papua New Guinea, which is a whole story in itself, but would like to spend some time exploring the national parks here in the United States.



Hannah Bowyer, LCAM, CMCA
Regional Director

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