Communication, Meetings and Volunteerism

Allen County Neighborhoods Association

Did You Know?

- About 62.6 million people have volunteered at least once for an organization.
- Women volunteer at higher rates than men.
- 35-54 year-olds are the most likely to volunteer.
- Married people volunteer at higher rates than singles.
- Those 65+ volunteer the most hours.

Effective Communication

• Why communicate effectively?
  – Creates trust.
  – Increase understanding of the Association’s purpose.
  – Increase compliance with rules and payment of assessments.
  – Improve likelihood of recruiting volunteer for committees and board positions.

Effective Communication

• Why communicate effectively?
  – Poor communication isolates the Board from the community and fosters an “us vs. them” mentality.
  – Open and honest communication creates the perception of transparency and fosters an improved sense of community.
  – Builds neighborhood relations, respect and improves reputation (think property values!!!).
ASSESS BOARD COMMUNICATION EFFECTIVENESS

Factors

• Openness
• Methods
• Tone
• Frequency
Openness

- Encourage sharing of ideas. Ask questions and make suggestions. Don’t fear criticism or assume homeowners have nothing to contribute!
- Fosters environment of collaboration and respect..
- Hold a resident forum before or after Board Meetings.
- Create a virtual suggestion box on your community’s website.
- Listen to your homeowners.

Openness

- Meet with chronic dissenters (complainers) and other problem owners to discuss issues.
- Never underestimate the power of civil, face-to-face communication to avoid disagreements.
Methods

• Utilize newsletters, blogs and social media.
  – Be engaging in some form of regular communication with property owners.
  – Ensure you have control over what is posted. Websites reflect on the reputation of the community (think property values!!)
  – Get permission before publishing personal information (i.e., birthdays, anniversaries, retirements, etc.)

Methods

• Post important documents on community website (i.e., governing documents/amendments, important announcements, information for realtors.)
• Consider an e-newsletter. Almost everyone has access to the Internet.
• Social events allow opportunities for face-to-face communication and build a sense of community. Post pictures of events on your website.
• Don’t exclude anyone. Provide paper copies to those without email.
Methods

- E-mail is NEVER private!
- E-mail is discoverable in litigation. Never say anything in an e-mail that you would not want to be read aloud in a courtroom.

Methods

- Never discuss Board business with another member via e-mail or text message. It could be construed as holding a “secret” meeting.
- If business decisions are made outside of a Board meeting, ensure that all Board members are participating and consent to the action, then ratify the action taken at the next meeting so that it is captured in the minutes.
Methods

• Text messages and e-mails can be forwarded without your knowledge or permission.
• DISGRUNTLED OR ANGRY BOARD MEMBERS LOVE TO FORWARD TEXTS AND E-MAILS!

Tone

• Leaders who set a positive tone harness a great deal of power by building relationships, getting things done through others, and communicating news (even bad news) without alienating others.
Tone

• Dealing with confrontational owners:
  – Apply active listening. Let them feel like they are being heard.

Tone

• Dealing with confrontational owners:
  – Demonstrate empathy, even if it seems impossible to do so, or you have to “fake” it.
  – Don’t meet angry and harsh words with the same. Avoid inflammatory words such as “clearly,” “absolutely,” and “always.”
  – Don’t ignore them.
  – Remain calm. Stand your ground without being combative.
Frequency

• Top complaints from owners:
  – Not receiving information in a timely manner or on a regular basis.
  – Hearing from the Board only about meeting notices or rules violations.
  – NO TRANSPARENCY!

Scheduling communication

• Establish a communication schedule and stick to it.
• Share urgent news that impacts association members in a timely manner.
• REPETITION IS KEY!
MEETINGS

Most Common Types

• Annual Meeting
• Board Meeting
• Special Meeting
• Town Hall Meeting
Annual Meeting

• Purpose
  – Report to the membership on actions taken during the recent fiscal year.
  – Present the forecast and budget for the coming year.
  – Vote on budget if required by governing documents.
  – Elect board/committee members.
  – Deliver reports.

Annual Meeting

• Specific agenda is typically outlined in the Bylaws.
• DO NOT create unnecessary agenda items!
• Consider amending Bylaws to permit electronic notices.
• Held the same time each year. Generally set forth in the Bylaws or Articles of Incorporation.
Annual Meeting

• Quorum: The amount of participation required, in person and by proxy, to conduct official business at the meeting.
  – Set forth in the Bylaws and/or Articles of Incorporation.
  – Note...This is different that VOTING REQUIREMENTS FOR DOCUMENT AMENDMENTS.

Annual Meeting

• Quorum: The amount of participation required, in person and by proxy, to conduct official business at the meeting.
  – Lower the quorum requirements, if needed, by amending the Bylaws.
  – If the Bylaws/Articles are silent, the Indiana Nonprofit Corporations Act sets the quorum at 10%.
Annual Meeting

• Written agenda and notice of the meeting are given prior to the meeting (follow the Bylaws).
• Provide childcare and refreshments to increase participation; advertise it in the notice.
• Use proxies to attain a quorum.

Annual Meeting

• What if there is no quorum?
  – Wait 15 minutes to see if more people show up.
  – Pack up and go home.
  – Discuss things informally but they cannot be acted upon – yet. If choosing this option, take informal notes so it can be brought forward at the next meeting when there is a quorum and then it is effectively decided.
Annual Meeting Tips

• Prepare the agenda and stick to it!
• Annual meetings are not open forums for venting and raising individual gripes; it is for ASSOCIATION BUSINESS!
  – Invite those with individual gripes or concerns to meet with the Board after the meeting (announce at the start of the meeting).
• Limit the floor to recognized speakers.
• If owners speak, consider limiting time (i.e., 3 min.)

Annual Meeting Tips

• Ask owners to submit agenda items in advance of the meeting. If the topic is not on the agenda, it is not discussed at the meeting.
• Hold potentially contentious meetings in a church or elementary school. If you expect it to be really explosive consider hiring security or off-duty law enforcement.
• Have a guest speaker (i.e., crime watch officer, police, city official, CPA, attorney) especially if critical issues are to be discussed and they can help explain.
Meeting Management

• Dealing with Difficult Owners
  – Stick to the agenda!
    • The Chair needs to be strong enough to keep everyone on task.
    • Consider this when electing a President.
  – Ask for specifics.
  – There is no requirement to let someone have the floor until the end of eternity.
  – Don’t be afraid to say no (tactfully).

Meeting Management

• Dealing with Difficult Owners
  – Schedule a private meeting.
  – Don’t get tricked into being an expert on everything.
    • Don’t bluff your way through it.
  – Be an active listener.
Meeting Management

• Dealing with Difficult Owners
  – Create rules, especially if you know the meeting will be contentious. Use time limits and parliamentary procedure to your advantage.
  – Hire security.
  – If all else fails, adjourn the meeting.

Board Meetings

• Purpose:
  – Set policy.
  – Review operations/finances.
  – Plan for the future.
  – Vote on association business (i.e., contracts, vendors, initiatives, budgets, etc.)
  – Vote on business issues discussed in executive session.
Open Board Meeting Law

• Indiana Code 32-25.5-3-3(g)(2)
  – “In addition to the right to inspect the meeting
    minutes of the homeowners association board, the
    member of a homeowners association has the right to
    attend any meeting of the homeowners association
    board, including an annual meeting of the board.
    However, the board of directors may meet in private
    to discuss delinquent assessments. The board of
    directors may also meet in private with legal counsel
    to discuss the initiation of litigation, or to discuss
    litigation that either is pending or has been
    threatened specifically in writing.”

Conducting Open Board Meetings

• Prepare the agenda in advance.
  – President sets agenda with input from other
    Board members; may work directly with property
    manager if professionally managed community.
• Set aside time at the beginning of meeting for
  homeowner questions or comments. Allow about
  15-20 minutes in the agenda.
• Set time limits for comments (i.e., 3 minutes each).
• Then, go into the regular part of the Board meeting.
Conducting Open Board Meetings

- Make clear to homeowners that they can OBSERVE, but not vote or participate.
- If unruly, adjourn the meeting.
- YOU DO NOT HAVE TO LET HOMEOWNERS PARTICIPATE OR SPEAK; THE LAW MERELY GIVES THEM THE RIGHT TO “ATTEND.”

Executive Session

- Move into “Executive Session” after an open board meeting.
- Use for:
  - Discussion of delinquencies.
  - Pending or threatened litigation.
  - Discussion of contract negotiations; bid reviews.
  - Employee or personnel issues.
- Separate minutes are not typically taken, but if motions/decisions are made, capture in minutes.
Tips for Meeting Efficiency

- Find appropriate meeting place.
- Set appropriate meeting time.
- Assemble/distribute meeting packets for each director in advance. Be sure they read the packets.
- Invite experts as needed to assist.
- Avoid endless discussion and call for a vote.
- Request reports be submitted in writing rather than presented verbally.
- Start/end on time. Lasting no more than 2 hours.

Minutes

Must Include:
- Type of meeting.
- Association name.
- Time/date/location.
- Whether a quorum was established.
- Attendees.
- Action taken on previous meeting minutes.
- All motions/votes and result of each.

Should NOT include:
- Detailed or verbatim recitation of discussion.
- Opinions or personal views.
- Criticism of others.
- How each individual voted (unless it is a director).
- Detailed notes from reports (reports do not have to be approved).
Minutes

Must Include:
• Officer/committee reports.
• Unfinished/new business.
• Adjournment time.
• Recording secretary’s signature.

Minutes

• A factual record of events/decisions and nothing more.
• Should be concisely written.
• Admissible as evidence in court.
• Indiana Code 23-17-27-1: Association must keep PERMANENT records of minutes of all director and owner meetings, a record of official actions taken by members or directors without a meeting, and a record of actions taken by committees.
Minutes

- Indiana Code 32-25.5-3-3: Members of an association have the right to inspect and copy minutes from any member meeting or board meeting for the prior TWO YEARS.

Proxies

- One member assigns voting power to another member.
- Can be general or limited.
- Can be the key to obtaining a quorum.
- Can be a particularly useful tool in efforts to amend documents.
Proxies

• Indiana Code 32-25.5-3-10
  – Name and address of association member giving the proxy.
  – Name of the individual who can exercise the member’s proxy.
  – The date on which the proxy is given.
  – The member’s signature.
  – An affirmation under penalty of perjury that the person signing the proxy has authority to do so.

Proxies

• Indiana Code 32-25.5-3-10
  – Member may state that proxy is limited to use in specific matters, and those matters must be described in the proxy.
  – Member may give a proxy for a meeting, if the proxy states that it expires on a date not more than 180 days after the proxy is given.
  – Member may create their own proxy form as long as it meets the legal requirements.
  – Proxy must be kept with records of meeting for which it is exercised.
RECRUITING VOLUNTEERS

Recruiting Volunteers

• Communicate the need.
• Educate.
• Promote community spirit.
Communicate the Need

• Communicate the need...repeatedly...through a variety of channels.
• Follow up with personal invitations. People to target include those who:
  – Would be a good match.
  – Have been vocal about how things are done (some dissenters have made excellent board members).
  – Are new to the community.

Educating

• Building skills and confidence can be addressed through various educational efforts, such as:
  – Local seminars.
  – Face-to-face conversations.
  – Newsletter articles.
  – Online testimonials.
  – Invitations to sit in on a committee meeting.
  – Recommended publications.
  – Online training or webinars.
Promoting Community Spirit

• Hold block parties/holiday parties.
• Create neighborhood assistance programs.
• Sponsor a safety seminar.
• Host a blood drive or other charitable event.
• Plan dinner/lunch/coffee social.
• Schedule poolside movie night or musical jam session.
• Organize a neighborhood clean-up day.

QUESTIONS?