



COMMUNITY BUILDER

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Expectations: The Foundation for Success

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Have you ever had the experience of witnessing the joy of a small child as they frolic gleefully at the playground? What about the subsequent experience of breaking the news to that small child that it is time to leave? If you get where I am going with this, you might understand that great upset occurs when the child is told, 'time to go!' They may throw themselves on the ground, cry or whine loudly, or run to a small crevice from



which they cannot be easily removed. Thankfully, I have learned over the years that the key to a great experience for myself and my child is to set expectations in advance. Now, I make sure to let them know how long we plan to stay at the playground and that I will give them a 15-minute warning before it's time to go. And, if I remain consistent, that message will be well received and 'time to go!' warrants nothing more than an 'okay, mommy!'

What is interesting about this example is that it's just a small snapshot of part of the human experience for adults and children alike. Setting expectations is not just an excellent tactic for parents in nurturing their children. It is a skill for interacting with people and reaping the rewards of a great experience for all involved.

Expectations and the world of community associations

The definition of the word expectation is: "a strong belief that something will happen or be the case in the future." If we consider how this applies in our world of community association management, we can quickly begin to see that expectations are often implied and even more often misunderstood. As board members, you've likely encountered a homeowner (or two) who has made assumptions about what exactly it is that the association is responsible to do, maintain, or accomplish. Often, the assumption or expectation is incorrect, and the homeowner is holding the board and association to a standard that is neither required nor fair. In this equation, both sides feel frustrated, and the experience is likely poor. So, how do we change for the better?

Governing documents set the expectation

At the very core of every community association is the governing documents. These usually consist of any combination of the Covenants, Conditions & Restrictions (CC&Rs, often referred to as the Declaration) bylaws, articles of incorporation, and any amendments. Additional documents such as rules and regulations and board policies also make up the governing documents. Together, they generally do a pretty good job of setting some expectations such as: who will govern the association and how they will do so, how often meetings will take place and what may be covered during those meetings, what elements are the responsibility of the association versus the homeowner, what insurance must be carried by either party and so on. The governing documents provide the basis for what to expect when living in a community association.

What if the governing documents aren't enough?

It is often the case where the homeowner, whose misplaced assumptions are cast against the board and association, has not taken the time to read or understand the governing documents thoroughly. Sometimes this is because they are not familiar with how associations work, or they may not have a copy of the documents, or because they can find them challenging to read and understand due to legalese. In any of these cases, the board can take steps to encourage homeowners to be more intimately familiar with the association's governing documents, thereby having an easier time with expectations. Here are a few steps for the board to consider:

1. Update and modernize the governing documents by way of amendments. Boards often encounter the need to update and renovate the governing documents, especially for associations that are more than 20 years old. Also common are associations operating on a 'boiler plate' set of documents that may not meet the needs of the unique association they govern.
2. If the governing documents allow, the board should consider drafting policies and procedures around various requirements found in the governing documents. Board policies are meant to create a simple outline of procedures and set homeowners' expectations as to how the board plans to enforce what is already provided for in the governing documents. Some examples are assessment management, covenants enforcement, and meeting rules.
3. There is no such thing as too much communication. Boards with a strategy around communications with the homeowners often report feeling more successful in their roles. Likewise, homeowners report feeling better and more at ease about the goings-on of their community and the trust of actions of the board. A communication strategy may include efforts such as newsletters, frequent eBlast updates, a transparent meeting schedule, a website with information, and more.

Vendor contracts – expectations that protect the association

Another area where we see a great need for expectations to be set is with the vendor relationship that we nurture for the good of the community. Often, we encounter situations where what was expected from a vendor is very different from what the vendor delivers. While it is true that sometimes this is a result of lack of service delivery, it is more often the case that the expectations of the board/association were not clear to begin with. Or that the board/association did not fully understand the vendor's contractual obligations. Here are some quick tips for avoiding these encounters and ensuring a better experience for all parties:

1. When preparing a request for proposal (RFP) to vendors, create a comprehensive scope of services for the vendor to respond. If the vendor provides information above and beyond the scope, be sure to ask for clarification.

2. Depending on the size, type, and scope of the RFP, consider seeking the assistance of professionals to help develop the scope, questions, and even the contract to be used.
3. Review the contract in detail, review it with association legal counsel, and be sure to ask questions and seek clarification before signing the contract.
4. At the start of the contract or project, set up a meeting for the express purpose of getting on the same page before work commences. After that, set regular check-ins with the vendor to review agreed-upon expectations and performance.

The Sentry Management Agreement is a perfect example of a contract that the board should be familiar with and reference often. The agreement details all of the management company's responsibilities and can help the board understand the role of their manager and Sentry Management. This is the first step to fostering a meaningful and successful relationship and can help board members to understand the role played by the board versus the community manager and Sentry Management.

Consistency is the key to the successful setting of expectations

It should come as no surprise that the key to successfully setting and delivering on expectations is maintaining consistency. As a mom, if I fail to set expectations before we go to the playground, it is almost guaranteed that my child and myself will have a difficult time and poor experience. Furthermore, it may leave my child confused by and distrusting of my actions in severe cases. The same can be said for anyone when expectations are set but not consistently delivered.

If the board wants to cut down on misunderstanding and distrust and promote the community's success, they'll need to be confident of the consistency of their actions. If policies are adopted and announced, the board must ensure consistent delivery on every step of the policy now and into the future. If a communication strategy is put into play, the board must put protections in place to deliver a consistent experience.

The examples in this article are only a minuscule sampling of the many issues and situations where the human experience in community associations can benefit from the consistent setting and delivery of expectations. We encourage your board to use this article as a prompt to discuss the areas where expectations may need to be set or clarified and to put into place a plan of action for the ultimate benefit of all who call the association home.



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