

# best practices

R E P O R T # 5

## Community Harmony & Spirit

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## **Acknowledgements**

### *Panel Members*

Pearl Atkinson-Stewart

Denise Bower, CMCA<sup>®</sup>, AMS<sup>®</sup>, PCAM<sup>®</sup>

Roger Hendricks, CMCA<sup>®</sup>, PCAM<sup>®</sup>

Alyce Hill

Lou Lutz, CMCA<sup>®</sup>, AMS<sup>®</sup>, PCAM<sup>®</sup>

Jasmine Martirosian

Drew Mulhare, CMCA<sup>®</sup>, AMS<sup>®</sup>, PCAM<sup>®</sup>

Pat Wasson, PCAM<sup>®</sup>

Clint Warrell, CMCA<sup>®</sup>, AMS<sup>®</sup>, PCAM<sup>®</sup>

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225 Reinekers Lane, Suite 300

Alexandria, VA 22314

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# best practices

*Community Associations Institute (CAI) and Foundation for Community Association Research are dedicated to conducting research and acting as a clearinghouse for information on innovations and best practices in community association creation and management. As part of the newly developed Best Practices project, operations related to various functional areas of community associations—governance, resident involvement and conflict resolution, and reserve studies/management—were presented during CAI's 50th National Conference in May 2001. The second series of Best Practice reports on the areas of financial operations, strategic planning, and community harmony & spirit, debuted in October 2001 at CAI's Community Leadership Forum.*

## **What Are Best Practices?**

Developing function-specific best practices in the community association industry has been a goal of CAI and Foundation for Community Association Research for several years. The Foundation is currently developing best practices in select topic areas using a variety of sources, including, but not limited to, past winners of the National Community Association of the Year Award (NCAYA), recommendations from industry experts, various industry-related publications and, once developed, recommendations from those communities scoring highly on the Community Performance Index. The subject areas for the initial best practices were selected through a survey of CAI and Foundation for Community Association Research national leaders.

The anticipated outcomes of the Best Practices project include:

- documented criteria for function-specific best practices,
- case studies of community associations that have demonstrated successes in specific areas, and
- a showcase for community excellence.

The benefits of benchmarking and best practices include: improving quality; setting high performance targets; helping to overcome the disbelief that stretched goals are possible; strengthening cost positions; developing innovative approaches to operating and managing practices; accelerating culture change by making an organization look outward rather than focusing inward; and bringing accountability to the organization because it is an ongoing process for measuring performance and ensuring improvement relative to the leaders in the field.

Accordingly, this project represents an ongoing exploration of best practices used in community associations. The first series of best practices will set the bar, which applied research will then continue to raise.

## SECTION ONE

# Overview and Introduction

### **Community Harmony & Spirit**

According to Foundation for Community Association Research's *National Survey of Community Association Homeowner Satisfaction*, the average community association resident volunteers twice a year for community-sponsored events. Nearly 60 percent of respondents said that they participate in each of the following community-wide events: parties, holiday celebrations, neighborhood watch programs, and community holiday decorating. Forty-five percent of respondents said that they participate in other social events. However, 45 percent of community association residents also admitted that they either never volunteer or only volunteer in their associations once a year.

How do managers and boards increase resident involvement within community associations? By treating all residents as stakeholders and developing and conducting community harmony and spirit-enhancing programs and including residents in the initial stages of program development.

Building community spirit is more than informing residents about board action and improvements. It's asking their opinions and developing programming that they will enjoy that will spur further community involvement.

Community spirit means pride in a community. The community associations of today are neighborhoods of yesterday. Spirited communities, like safe neighborhoods, have higher sale values. Community spirit creates an emotional equity that sets communities apart from the rest.

## SECTION TWO

# Ways to Promote Community Spirit

To promote community spirit in your community, try one of these activities:

- **Create a neighborhood assistance program.** Seabrook Island Property Owners Association in Johns Island, South Carolina, established the Good Neighbor Connection. Residents volunteer to provide neighbors with all types of assistance and a monthly coordinator assigns volunteers to their respective jobs. Ford's Colony at Williamsburg Homeowners' Association, in Williamsburg, Virginia, chartered Caring Neighbors under its Activities Committee. These volunteers provide cards and personal calls, transportation for medical appointments and rides to the airport, meals for families with an illness or death in the family, loaner items for medical equipment such as canes and crutches, loaner items for grandparents with visiting grandchildren such as cribs and high chairs, handyman services for small jobs, and an extensive resource of those willing to discuss their medical experiences with those facing these challenges. Volunteers coordinate each major service under an elected program director.

- **Hold a neighborhood swim-a-thon.** The Greenbriar Community Association in Greenbelt, Maryland, held a community swim-a-thon. Residents solicited pledges from neighbors for each lap they swam. Greenbriar donated the event's proceeds to the American Cancer Society.
- **Print a community T-shirt.** The management of Village Cooperatives, Inc., in Ann Arbor, Michigan, printed community T-shirts and sold them for \$10 each. The back of the shirt read, "I Live on 64 Acres," and the front had the community's logo. Not only does this increase community spirit, but it also generates additional revenue for the association and serves as a marketing tool.
- **Hold a clothing drive.** The board of Atrium in Arlington, Virginia, developed a program to support the work of the charitable organization, Unity Health Care. The organization put bins in Atrium's health club. Residents put items—both new and used—in these bins. Unity Health Care then distributes these items to other charitable organizations in the metropolitan Washington, DC area.
- **Build and install park benches along walking trails and ponds.** Find the craftsmen in your community and have them build community park benches with materials provided by the association. This saves money and is a great community spirit project both for the volunteers and the enjoyment of the residents. Rent an auger for easy installation and don't forget to call your local utility companies to help you mark underground utilities!
- **Discover ways in your community to support local charities and schools.** A measure of success and contentment can be evaluated in the level of dedication to giving back to the greater community. Sharing your time, talents, and financial resources as individuals, small groups, and as a corporate entity is a true reflection of community spirit. Examples of such efforts at Ford's Colony includes: collecting food at the community center each Thanksgiving for a local food bank and the Salvation Army; opening the community twice each year to a Walk/Run for Hospice and Housing Partnerships with corporate sponsors; sponsoring golf tournaments to support local schools and charities; and contributing direct financial support to public and private school booster clubs, a humanitarian medical center, and an environmental monitoring group. In addition, the clubs in the Ford's Colony Activities Committee sponsor a charity of choice. The Craft Club makes booties, hats, and blankets for the hospital and nursing homes. The nature club, Trailblazers, support environmental monitoring and education in a critical wetland habitat. The William and Mary Fan Club supports the local college athletic department. The Theater Club performs for the nursing homes. The Garden Club collects an extra dollar per person at the monthly luncheons for donations. The Country Club restaurant hosts dinners for charities, such as the Make a Wish Foundation. Given this level of public outreach, the community association is often mentioned in local newspaper articles.
- **Recognize children.** Use your newsletter to note worthy accomplishments in academics and athletics for the teenagers in your community. Coordinate with high schools and your neighborhood parents to get a list of national honor students, first honor students, varsity athletes, and other special honors. Ford's Colony publishes these noteworthy events twice a year.

- **Sponsor a safety seminar.** Did you know that more than 80 percent of child safety seats are improperly installed in vehicles? Coordinate a safety seminar with Emergency Services to educate parents and grandparents on this and other issues such as bicycle safety, Ident-a-Child, medical and medicine alert folders for 911 EMS responses to your home, and Neighborhood Watch.
- **Promote health and well-being.** Use your community center to host a blood drive and/or blood pressure and cholesterol screening. Call your hospital for area coordinators and services. Provide lemonade and cookies as snacks. This is also a great time to pass out a resident survey or just meet residents and gauge their needs.
- **Schedule a poolside movie night.** On Friday nights, the aquatic center at First Colony Community Services Association (FCCSA) in Sugar Land, Texas, is turned into a movie theater where people can relax on a lounge chair or float on a raft while watching a movie.
- **Conduct a resident survey.** Every year since 1994, FCCSA contracts with a professional research firm to conduct a survey of membership opinions on service and issues facing the community. The results of the survey help the board and management budget services. If your association can't hire an outside firm to conduct the survey, go door to door, send the survey via snail- or e-mail, or conduct it on your association's website.
- **Facilitate neighborhood block parties.** Use your newsletter to encourage each neighborhood in your community association to have an annual block party. It is a great way to meet new neighbors and foster community spirit. Friends tend to work out concerns without involving the Rules Committee. One or two families can be the "Block Heads" that coordinate the time and date; determine the needs for salads, entrees, and desserts; provide a few portable tables; secure the cul-de-sac from traffic; open their homes for restrooms; and dispose of trash. Potluck with a dish that serves six to eight usually works well. Individuals bring their own lawn chairs.
- **Choose a signature shrub or tree and celebrate each Arbor Day.** Ford's Colony chose the Pink Crepe Myrtle as its signature tree. Each Arbor Day, the community plants a dozen crepe myrtles in a ceremony keyed to our environment with adults and children participating. The association negotiated a price with a landscape company to install a six-foot crepe myrtle in resident yards on request and uses the monthly newsletter as a reminder.
- **Publicize upcoming events via e-mails and the web.** More and more community association members have websites and e-mail addresses—why not use them? They're an inexpensive way to promote upcoming special events and meetings. Additionally, residents can reply to the e-mails and boards can obtain instant feedback!
- **Publish event photos.** What better way to promote community spirit than to show non-participants all the fun that they're missing?

All of the above-mentioned activities are great in theory, but how do you really get residents involved? Here are some tips.

- **Hook them from the get-go.** When new owners move in, send over a board or committee member to welcome them to the community. Find out a little about the new residents and their interests. Let them know about the community and how it works. Don't just bombard them with copies of your community's rules, regulations, and CC&Rs. Follow-up with a phone call approximately four- to six-weeks later just to check in and see if the residents have any questions. This is also a great time to have them fill out a questionnaire to find out the activities in which they would participate. Ask those who give you new and exciting ideas if they want to help organize the activity.
- **Create activities for new residents.** For instance, Ford's Colony has a Newcomers Club. New residents mingle each month with other new residents. Information is provided at each monthly meeting, with rotating subjects, to help indoctrinate the members into the area. Mostly it is a social opportunity for those with a common bond of being newcomers. An effort is made to not duplicate the interests served by the Activities Committee and to integrate the newcomers into the mainstream activities. Discharge papers are officially presented to Newcomers Club members after their two-year eligibility is up.
- **Give away freebies.** Everyone likes to get something for nothing. Solicit a donation of goods, services, or the money to purchase give-a-ways for your next event. The sponsor will gain visibility within your community and you'll draw more people to the activity. When the residents do make it to the activity, they can mingle with each other and learn more about the association and its benefits.
- **Send thank-you notes.** When someone volunteers—in any capacity—say thanks. Knowing that the board or manager appreciates their involvement goes a long way. It also may start a chain reaction of positive publicity for the board.
- **Practice positive customer service.** If a resident writes a letter, sends an e-mail, or leaves a message, make sure that you reply within 24 hours, even if you don't have a definitive answer yet. Let the resident know that you've received their message and that you're working to find an answer—and give them a realistic time period during which you will respond. This does two things: it acknowledges their concern and it provides a realistic expectation of the time that it will take to get back to them. Make the 24-hour policy known—post it on your Web site, put it on your e-mail away message, and spell it out on your voicemail. Sometimes, a perceived lack of customer service creates animosity between residents, board, and management, and results in lack of resident participation in association-sponsored activities.
- **Hold board office hours.** Have one or more members of the board available once every month to address residents' concerns or questions. With a five-member board, this is only about two nights out of the whole year for each board member. Publish the office hours and location—whether it is at the association's clubhouse or the board member's home itself. This openness counteracts the rumor that boards are not open to input. Have the association's governing documents, resolutions, and meeting minutes available just in case someone wants to see them. Again, this interaction shows residents that the board cares about the community and is open to new ideas. It also personalizes the board and puts faces with sometimes-infamous names.

- **Hold quarterly town hall meetings.** Ford's Colony holds quarterly town hall meetings that are dedicated to information sharing. While board meetings are held for two hours beginning at 3:30 p.m., town hall meetings are held at 7:00 p.m. The board presents an agenda of current issues and conducts a question and answer forum. The board responds to questions but doesn't take action as a board in this forum. Town hall meetings are very well attended with five to ten percent of the adults expected.
- **Look for a reason to celebrate.** Celebrate your association's success. Celebrate holidays—big and small, traditional and quirky. It's a great way to meet neighbors and get people enthusiastic about the community.
- **Sponsor association participation in community-wide events.** Don't limit involvement to the boundaries of your association. Encourage resident participation in local organizations such as the Boys and Girls Club, the YMCA, or Rotary Club. Send local officials and organizations your association's newsletter and upcoming programs so that they know about your association—and that your residents are ready to participate in their events.
- **Support community awareness in local politics.** Use your community clubhouse to host a Candidates' Night in October of election season. It is a great way for residents to meet the candidates in either a night dedicated to each political party or in a debate forum. The candidates will eagerly provide refreshments for this opportunity. Allow an insert, paid by the candidates, in your November or October newsletter in a standardized information format that includes a 3x5 inch picture along with the candidate's short bio and campaign focus points. Appoint a group of volunteers that are willing to rotate attendance at each local government meeting as liaisons for the association. The liaisons demonstrate your community's interest in governmental affairs, get early leads on issues, and report back to the board. The liaisons should also have direct relationships with the local government planning department for early warnings as well as feedback into the very important planning staff recommendation.
- **Establish standing committees with meaningful responsibilities and clean charters.** If people have defined roles and responsibilities with a goal in sight, they're more apt to participate. Also, hold your social events at locations where people are already gathered. Have a pool party or a volleyball contest during operating hours. You might involve people who weren't planning on it.

## Case Studies of Community Harmony & Spirit

### case study #1

#### The Landfall Council of Associations, Inc.

<b>Age:</b>	16 years
<b>Size:</b>	1000 homes
<b>Location:</b>	Wilmington, North Carolina
<b>Board Size:</b>	Seven (7)
<b>Contact:</b>	Don Stallings, CMCA®, AMS®, PCAM®, General Manager
<b>E-mail:</b>	Landfallpoa@prodigy.net

Landfall is a 2,200-acre gated community master association with 22 sub-associations comprised of two condominium associations and nine villa communities. It has 1000 homes on its 1,800 lots. Landfall's beauty, peace, and tranquility are prevalent in its owners' attitudes, spirit of giving, and cooperation, and are enhanced by its natural surroundings. Landfall Council of Associations works closely with its members. Residents initiate and sponsor the many programs supported by the community association. Further, residents belong to charitable organizations that benefit both Landfall and the Wilmington community. They participate in sports associations that utilize its recreation fields, seek political involvement through Landfall elections and political forums, and support the beautification of both Landfall and the Wilmington area. Landfall residents enliven the senses with their efforts to not only create, but also to maintain the harmony and spirit of life.

#### The Landfall Foundation

The Landfall Foundation is a charitable organization formed in 1996 to establish a community support effort specifically originating from Landfall residents. The Landfall Foundation's purpose is to provide financial support to charitable organizations and activities principally for the Greater Wilmington area and New Hanover County. It donates funds to federal tax-exempt charitable organizations whose missions are to support health and welfare activities, education, and the arts. Priority is given to organizations with low administrative overhead and high volunteer participation. In 2000, the Grants Committee gave \$35,000 to charity, and by the close of 2001, the goal of at least \$45,000 will be reached.

The Foundation raises funds through individual solicitations and special events throughout the community. Many Landfall residents actively contribute both time and money to the Foundation's causes and activities. Landfall residents hope that the Foundation will be a vehicle through which they can maximize their support to local smaller charities and activities. Typical grants are distributed in the \$500 to \$2,000 range, and the Foundation will give priority to projects where such amounts can make a difference.

#### Landfall's Annual Fourth of July Celebration

Landfall's Fourth of July Committee starts preparations in January for the community's largest annual celebration. This event requires advanced planning, dedicated volunteers, and lots of hard work. This all-day, fun-filled event has activities for residents of all ages, such as golf and tennis competitions, kids games, sack races, a pie eating contest, a dunking machine, a two-generation softball game, a vehicle and children's parade, and a

flag raising ceremony. It concludes with an old-fashioned cookout at the clubhouse. In 2001, more than 800 residents participated in this event.

### **The Great Oaks Club**

Founded in 1991, the Great Oaks Club encourages environmental improvement and aids the protection and conservation of native trees, plants, and wildlife. The Great Oaks Club has more than 200 members who help beautify the common grounds of Landfall. Some of the club's activities include decorating for Christmas, arranging workshops and educational seminars relating to Coastal Carolina, and a variety of social activities for those interested in Southern classic plants, wildlife, gardening, perennials, and more.

### **Habitat for Humanity**

A Landfall resident, who is a local builder, and his wife have organized the construction of a Habitat for Humanity home. Resident volunteers are constructing a four-bedroom home in Wilmington, NC. The association's Great Oaks Club is donating their landscaping expertise to the project, and a resident attorney is donating his legal services. Construction began August 1, 2001.

### **Provisional Membership Program**

The Country Club of Landfall is an integral part of its community and the center of social activities. It is a private equity club and members must be Landfall property owners. Therefore, the board of the Country Club of Landfall has created an exciting program that offers non-club member residents an opportunity to try a provisional membership free for one year. Payment of the yearly dues along with the food and beverage minimum, paid in advance, entitles the non-club member to all of the privileges of that particular membership. Once the provisional membership expires, the provisional member may join the Country Club of Landfall by paying the equity initiation fee.

### **Tree Replacement Program & Fall Festival**

Tens of thousands of trees have been destroyed as a result of six hurricanes and tropical storms over the past five years. Therefore, the Planning Committee developed an aggressive tree replenishment program with the installation of 500 trees and 300 saplings annually for the past two years. It has been, beyond all expectations, a contagious effort by the owners. Consequently, a tree sale and vendor fair is evolving into a community wide event. A Fall Festival is in the works with help from the Agricultural Extension Office, the local authorities, fire and police, the association's landscaping staff, and many other vendors that the Landfall Council of Associations deals with every day. This festival will be a great opportunity to ask questions to the landscapers, fire department, the agricultural office, the lake contractor, and many others. It will also be an ideal time to purchase trees, shrubs, plants, etc. from the wholesalers themselves.

## case study #2

### Riverwoods Plantation RV Resort Condominium Association

<b>Age:</b>	19 years
<b>Size:</b>	640 units
<b>Location:</b>	Estero, Florida
<b>Board Size:</b>	Seven (7)
<b>Contact:</b>	Marilyn Donaldson, CMCA®, CAM®
<b>E-mail:</b>	rpcondo@aol.com

Riverwoods Plantation is a National Community Association of the Year (NCAYA) Hall of Fame 2000-2002 member located in southwest Florida. Of its 78 acres, residential park homes are constructed on 60 acres, while a recreational area, private roadways, a boat ramp, boat docks, a picnic area, a pitch and putt golf green, and a 116-space boat storage facility comprise the remaining land.

Two of the top priorities at Riverwoods are promoting community involvement and volunteer programs. Many residents participate in various civic and service organizations and are acquainted with members of the Lee County Board of Commissioners. These volunteers coordinate many Lee County projects such as establishing bike paths, developing four-lane roadways, establishing a senior health center, building stop lights at dangerous intersections, landscaping roadways, and instituting hurricane shelters and water conservation projects. Additionally, association residents played an integral part in preventing a land development company from developing adjacent land, which was home to a family of bald eagles, Florida panthers, black bears, and land tortoises.

Residents also have the opportunity to participate in numerous charitable events throughout the year including:

- Volunteering for Meals on Wheels.
- Volunteering at local nursing homes, hospitals, senior centers, blood banks, churches, and the Humane Society.
- Becoming part of the association-sponsored group Sharing With Others, which sews and purchases items for local foster children and battered women organizations.
- Giving a scholarship to a worthy local high school graduate to attend a local university.
- Holding the Senior Mini-Olympics, an event where people from Ft. Myers, Cape Coral, and Naples compete in various Olympic-like events. The association donates all event proceeds to Estero High School.
- Volunteering at the association's senior friendship clinic and center.

However, the most unique program at Riverwoods is the ½ Bubble Construction Company. In 1987, nine residents who work in or have a hobby in the building industry established the ½ Bubble Construction Company. Its goal? To help the association's maintenance staff complete its tasks—without adding additional costs. The group is overwhelmingly successful. The number of volunteers has grown to 134 in the past 14 years. Company members include electricians, plumbers, mechanical and electrical engineers, brick layers, artists, blue print drawers, cement finishers, designers, draftsmen, architects, carpenters, roofers, aluminum workers, heavy machine operators, painters, and

telephone technicians. The company's coordinator, Mid Kitchen, works with the county on permits and sets up as many as six different projects a week, organizing volunteers for each of the projects. He orders the materials for all the projects and designates both a job foreman and a foreman for each trade needed to complete the project. The association also has both a photographer and a reporter who chronicle the company's projects in the association newspaper. To protect the association and its volunteers, the association purchased extra insurance that covers up to 70 volunteers at a time.

The various projects that the company has completed include:

- Repaired retaining walls, pilings, finger piers, walkways, and ramp at riverfront.
- Converted old sewer plant and holding ponds over to a RV storage area that holds 70 RVs, 82 sheds, and 32 cars or trucks.
- Installed a solar electric system for the pool and spa.
- Dug and installed irrigation lines with sprinklers throughout the entire 83 acres.
- Installed 14 air conditioners and new air handlers, 42 pieces of duct, and 42 registers.
- Built a 59x28 pavilion with counters, sinks, handicap restrooms, and patio for barbecues.
- Put two new spillways into one of the lakes.

In addition to these larger projects, the company also does most of the minor repair jobs. Most volunteers work every Wednesday from November until May. This program has saved Riverwoods a substantial amount of money. In fact, for some projects it's not just the manpower that is donated—it's also the materials. For instance, private individuals paid for the installation of two lake fountains, and the pavilion was funded by the association's memorial fund and dedicated to residents who have passed away. Every year staff conducts a resident survey to help determine what projects the ½ Bubble Company will tackle next. The program has been extremely successful and representatives have visited other communities to talk about and explain how others can start a similar program.

## case study #3

### Chicago Homes of Dearborn Park Homeowners Association

<b>Age:</b>	Six (6) years
<b>Size:</b>	36 single-family homes
<b>Location:</b>	Chicago, Illinois
<b>Board Size:</b>	Five (5)
<b>Contact:</b>	Bonnie McGrath
<b>E-mail:</b>	BonMcGrath@aol.com

Chicago Homes, located near Chicago's south side, is a community that embraces community spirit. This sense of community is attributed to individual residents' commitment to, and involvement with, the homeowners association. Whether their roles are large or small, residents can choose the degree of participation with which he/she feels com-

fortable. Additionally, each resident respects and accepts their neighbors' involvement. In fact, non-board members plan some of the activities. Just what activities do all these volunteers plan?

- **Holding a progressive dinner.** For instance, a resident regularly organizes a Christmas-time progressive dinner. Residents volunteer to open their homes and cook one component of the meal. Neighbors go to the assigned homes for each of the dinner's courses and proceed to the next home for the next course.
- **Planning a community picnic.** Residents organize a picnic in the association's driveway (the back of each home is on the driveway) each summer for residents to mix and mingle.
- **Coordinating a book club.** Another resident began a monthly book club. It's still strong and growing after three years.
- **Participating in the City of Chicago's "Adopt-a-Street" program,** which recognizes residents who beautify and maintain their community.
- **Tutoring** children at a neighboring school.
- **Attending Community Alternative Policing Strategy (CAPS) meetings** at the neighborhood police station to learn about crime and quality-of-life problems in their neighborhood or to report problems they have noticed in the area.

No one in the association is pressured to do anything beyond their level of interest. No one is asked to do anything they would prefer not to. For example, instead of asking a resident to start a homeowners Web site, the association waited until one resident (who hadn't been involved with the association at all) suddenly found his "niche" and came up with the idea to start one!

This is the secret to Chicago Homes' success—encouraging residents to participate in and coordinate activities that complement their natural interests (and not to pressure or ask anyone to contribute beyond that natural interest). Residents know they are appreciated and respected and not looked down upon if, for instance, they don't attend board meetings.

## case study #4

### **Pelican Cove Condominium Association, Inc.**

<b>Age:</b>	26 years
<b>Size:</b>	731 condominium units
<b>Location:</b>	Sarasota, Florida
<b>Board Size:</b>	Nine (9)
<b>Contact:</b>	Robert Malan, General Manger
<b>E-mail:</b>	pelicancove@home.com

Pelican Cove Condominium Association, Inc. is a residential community that full-time residents, part-time residents, and snowbirds call home. The association, constructed in a native hammock, on 75 acres on the east side of Little Sarasota Bay in Sarasota, Florida, consists of approximately 80 two-story residential buildings, six swimming pools, three

recreation centers, four tennis courts, one sauna, one spa, two small gazebos, and five and a half miles of private roads. Clower Creek meanders through the property, and a man-made channel provides boat access from Pelican Cove's 85-slip harbor to the Bay and Gulf of Mexico.

The 35-member staff works hard to maintain and improve this unique property for the benefit of the active and informed membership of approximately 1,200. Likewise, the board of directors recognizes that sound financial management, proactive capital projects, and frequent, effective communication are the keys to maintaining this dynamic and progressive community.

It's well known that volunteers make the world a better place in which to live. It's also known that volunteers are one of the key ingredients in creating a true community out of a condominium association. They are needed to serve on the board, research topics for committees, organize parties for clubs, and take reservations. The best volunteers do not give of their time and talents in order to receive never-ending praise—they give in order to witness others enjoying the fruits of their labors.

In an attempt to draw attention to this noble, extremely low-paying, and often thankless job, the association began a recognition program for volunteers at the February 2000 annual meeting. The winners were announced during the meeting in front of an audience of approximately 300 unit owners. One of the awards presented was the Sterling Award named after the then-president, Sterling Emerson, who has always been a major proponent of volunteering.

These award winners are fine examples of the importance of volunteers—for it is these individuals who go the extra mile to conceive and organize events and programs that truly make Pelican Cove a wonderful place to live. A public thank you and a \$50 gift certificate to a local restaurant is the least the association can do in recognition of their accomplishments.

## case study #5

### The Ford's Colony at Williamsburg Homeowners' Association, Inc. (FCHOA)

<b>Age:</b>	17 years
<b>Size:</b>	2,400 residential units
<b>Location:</b>	Williamsburg, Virginia
<b>Board Size:</b>	Five (5)
<b>Contact:</b>	Drew Mulhare, CMCA®, AMS®, PCAM®, V.P. Operations for Management Agent
<b>E-mail:</b>	dmulhare@fordscolony.com

Ford's Colony is a 2,800-acre gated-community, mostly single family, with one sub-association of townhomes. The community is zoned for 3250 residential units and a hotel/conference center. More than 2400 residential units are sold with 1500 homes built as of August 2001. There is a private golf resort of three championship courses and a country club, which has an AAA Five Diamond restaurant open to the public. Marriott Vacation Club owns a 200-unit timeshare in the golf resort area. A 35-acre, 400-room hotel is planned for the future.

Ford's Colony is a National Community Association of the Year (NCAYA) Hall of Fame 2000–2002 member located near Williamsburg, Virginia. More than 50 percent of the 2800 acres is open space with more than 500 acres in wetland preserve and ponds. The association maintains 38 miles of private roads in this gated community with private security. The community transitioned to an elected board of directors in February 2000. The association retains the developer, Realtec Incorporated, AAMC®, as the management agent. Realtec employs 65 people in administration, recreation, maintenance, and security. Ford's Colony is the winner of numerous awards in land planning, environmentally sensitive development, marketing, golf, restaurant operations, and association management. Most notable awards include the Take Pride in America Award, Number One Master Plan in the United States, AAA Five Diamond, DiRona Award, and CAI's NCAYA. Ford's Colony is listed among the Top 50 Places to Retire in North America.

The association board of directors chartered nine committees to assist and advise in matters of activities, communications, covenants, facilities, finance, nominating, road maintenance, security, and strategic planning. The Activities Committee is comprised of sixteen clubs and groups and is charged with the community spirit programs. There are several smaller groups, but any group comprising at least 25 people can petition to join the Activities Committee for priority scheduling of the common facilities and dedicated print space in the monthly newsletter. Members of this committee include bowling, bridge, caring neighbors, computer, crafts, dinner, garden, hospitality, newcomers, swim team, tennis, theater, Trailblazers, travel, William and Mary Fan, and youth activities.

In addition to the club activities, community spirit programs include: an annual yard sale with residual items donated to Kings Daughters Hospital; a Walk/Run each spring and fall with proceeds to Housing Partnerships and Hospice respectively; thirty neighborhood block parties each August; quarterly trash pickup on a local road; host facility for annual CAI ABCs training for associations in the Central Virginia Chapter; and quarterly theme dinner socials. Ford's Colony is renowned for its volunteerism and charitable giving. Most clubs connect with a local charity and provide personal time, gifts, or financial contributions. The association's budget includes a line item for charitable contributions made to high school booster clubs, environmental monitoring, and a medical center for the needy. A significant portion of the association's annual meeting is in celebration of community volunteerism. Churches, nursing homes, schools, local government, charities, and the hospital are the beneficiaries. The association is a Connected Neighbor with other associations in the county area and assists smaller associations with advice and training. The newspaper routinely acclaims the volunteerism in Ford's Colony resulting in breeding even more community involvement.

Through the Caring Neighbors program, volunteers assist the association's residents in temporary need. Two program directors coordinate the mission and disseminate leads to the appropriate sub-group. Each sub-group is led by two or more coordinators. Cares and Concerns writes personal cards and makes phone calls to express sympathy and compassion. Chauffeur on Loan provides transportation for medical services or an airport pickup for arriving family in bereavement. Cook's Pantry provides meals for those unable to prepare meals due to a death or illness in the family. Often casseroles are prepared in advance and kept frozen. Granny's Attic maintains a list of residents willing to lend a crib, highchair, car seat, and other items for visiting grandchildren. Handyman is a list of volunteers willing to do odd jobs for those that need a little help around the house. Medical Information Network is a resource of people willing to talk about a personal experience with a medical condition to discuss medical treatment and recovery. Nurse's Closet maintains a list of those willing to loan medical equipment such as walk-

ers, crutches, and wheelchairs. Overall, Caring Neighbors is so successful, yet simple in operation, that it is being emulated throughout many associations across the country. It is rooted in volunteerism and community spirit. Minimal program costs are quickly supported by donation. Recipients are touched by the community compassion and wish to return the kindness to others. What you would do for your family and closest friends is being done on a community-wide basis.

### **Additional Resources**

**Best Practices Reports** (*available at [www.cairf.org](http://www.cairf.org)*)

*Financial Operations*

*Governance, Resident Involvement & Conflict Resolution*

*Reserve Studies/Management*

*Strategic Planning*

#### **Books Available From CAI\***

*Be Reasonable! How Community Associations Can Enforce Rules Without Antagonizing Residents, Going to Court or Starting World War III.* Item #1400

*Communications for Community Associations, GAP Report No. 15, 4th Edition.* Item #5591

*Community First! Emerging Visions Reshaping America's Condominium and Homeowner Associations.* Item #1435

*Results of the Foundation for Community Association Research's National Survey of Community Association Homeowner Satisfaction.* Item #1486

#### **Other Books**

*Building Communities from the Inside Out: A Path Toward Finding and Mobilizing a Community's Assets* by John P. Kretzmann, John L. McKnight; ACTA Publications; ISBN: 087946108X

*Collaborative Leadership: How Citizens and Civic Leaders Can Make a Difference (The Jossey-Bass Nonprofit Sector)* by David D. Chrislip, Carl E. Larson; Jossey-Bass; ISBN: 0787900036.

*Community Building: What Makes It Work: A Review of Factors Influencing Successful Community Building* by Paul Mattessich, Barbara Monsey; Amherst H. Wilder Foundation; ISBN: 0940069121.

*Relationships: Resolving Conflict and Building Community;* Unknown; ISBN: 1576830233.

#### **Web Sites**

Community Associations Institute—[www.caionline.org](http://www.caionline.org)

Foundation for Community Association Research—[www.cairf.org](http://www.cairf.org)

#### **CAI's Homeowner Education Track**

Please contact your local CAI chapter for class dates, times, and locations.

For a complete list of CAI chapters and contact information, visit CAI's website at [www.caionline.org](http://www.caionline.org) or call 888-CAI-4321.

*\*All item numbers are taken from the 2002 Community Associations Press Bookstore. For more information, please call CAI Direct at 888-CAI-4321.*

## About Foundation for Community Association Research

Foundation for Community Association Research is a national, non-profit 501(c)3 organization founded by CAI in 1975. The Foundation is the driving force for common interest community research, development, and scholarship. Both CAI and the Foundation are the only organizations recording the history of, and identifying trends in residential community association living. There are more than 231,000 community associations across the country, reflecting the growth of community-based solutions to modern housing problems.

Foundation for Community Association Research serves as the catalyst for positive change in the community association industry by:

- Illuminating future trends and opportunities;
- Supporting and conducting research;
- Mobilizing resources.

Operating under the belief that community associations reflect a deep commitment to grassroots democracy, the Foundation has fostered the growth of associations by providing educational and research support through CAI's chapters. The Foundation is committed to providing quality research and publications for promoting academic interest in these phenomena.

For more information about Foundation for Community Association Research, please call (703) 548-8600 or visit our website at [www.cairf.org](http://www.cairf.org).

## About Community Associations Institute (CAI)

Community Associations Institute (CAI) is a national, nonprofit 501(c)(6) association created in 1973 to provide education and resources to America's 231,000 residential condominiums, cooperatives, and homeowner associations, and related professionals and service providers. The Institute is dedicated to fostering vibrant, responsive, competent community associations that promote harmony, community, and responsible leadership.

As a multidisciplinary alliance, CAI serves all stakeholders in community associations. CAI members include condominium and homeowner associations, cooperatives, and association-governed planned communities of all sizes and architectural types; individual homeowners; community association managers and management firms; public officials; and lawyers, accountants, engineers, reserve specialists, builder/developers, and other providers of professional services and products for community associations. CAI has nearly 17,000 members in its chapters throughout the U.S. and in several foreign countries. The national office is in Alexandria, Virginia.

### How does CAI serve its members?

- CAI advances excellence through seminars, workshops, conferences, and education programs, some of which lead to professional designations.
- CAI publishes the largest collection of resources available on community associations, including books, guides, *Common Ground* magazine, and specialized newsletters on community association finance, law, and management.
- CAI advocates community association interests before legislatures, regulatory bodies, and the courts.
- CAI conducts research and acts as a clearinghouse of information on innovations and best practices in community association creation and management.
- CAI provides networking and referral opportunities through both the national office and local CAI chapters, CAI-sponsored insurance programs for directors and officers, a 401(k) retirement plan, and discounts on products and services.

### How can I get more information on CAI or on community associations?

For membership or other information, call the national office at (888) CAI-4321 (M–F, 9–6:30 ET) or visit CAI's website at [www.caionline.org](http://www.caionline.org).



225 Reinekers Lane, Suite 300  
Alexandria, VA 22314  
[www.caionline.org](http://www.caionline.org)