

Course 1

Intro to Condo/HOA Property Management

15 Module Course Outline

Module 1

Getting Started

Module 2

- **Definition of Types of Condo/HOA Management**
- **What are the Two Largest Problems That You Face In Managing Associations?**

Module 3

- **The Importance of Reserve Studies**

Module 4

Time Management Overview

Module 5

Time Management & Personal Organization

Module 6

Organizing Association Data, Part One

Module 7

Organizing Association Data for Proactive Management

Module 8

Manager & Board Members as Respected Leaders of the Community, Part One

Module 9

Manager & Board Members as Respected Leaders of the Community, Part Two

Module 10

Vocabulary of Building Mechanical Systems

Module 11

Establishing & Maintaining Relationships with a Trusted Network of Vendors

Module 12

Planning for Major Repairs and Renovations

Module 13

The Property Manager's Role in a Major Renovation Project, Part One

Module 14

The Property Manager's Role in a Major Renovation Project, Part Two

Staying Vigilant, Avoiding a Crisis, and Closing Out the Project

Module 15

Capstone - Core Industry Problems and Ideas for Solving those Problems

Course 2

Mastery in Communications: The Foundation of your Relationships

15 Module Course Outline

Module 1

Getting Started

Module 2

Emotional Intelligence & Staying Calm

Module 3

Social Skills & Connecting with Others

Module 4

Building Trust as a Leader & Adapting Your Style to be Heard by Others

Module 5

Better Business Writing (Part One)

Engage Readers, Tighten and Brighten, Make Your Case

Module 6

Better Business Writing (Part Two)

Better Emails, Letters and Texts

Module 7

Persuasive Presentations: Selling the Benefits of New Projects and Ideas

Inspire Action, Engage Your Audience, Sell Your Ideas

Module 8

The Engine of a Strong Association

Well Planned and Executed Board Meetings

1. Writing Meeting Agendas
2. Running Board Meetings
3. Writing Meeting Minutes

Module 9

Group Communication:

- In bound from owners: Phone calls, comments & annual survey
- Out bound from board & manager: Newsletters, photography & web site

Module 10

Photography, Newsletters and Web Sites

Production basics to help you oversee creation of engaging and educational communication pieces for owners

Module 11

"But I didn't know that!"

Answering Common Misunderstandings about Association Living

Module 12

Your Ongoing Thoughtful Communication + Legal Counsel to Solve or Lessen Tough Problems

Module 13

Explaining Complex Issues for Group Communication

Module 14

Delivering Praise (Abundantly) + Confronting Common Behavior Problems

Module 15

Capstone - Tough Communication Problem to Solve

Course 3

Dealing With and Leading People: Difficult to Wonderful

15 Module Course Outline

Module 1

Getting Started

Module 2

Five Categories of Owners, Grouped from 'Most Difficult' to 'Agreeable & Leaders'

Module 3

What Makes You the Way that You Are?

The Big Five Personality Theory + One

Module 4

Personality Disorders and High-Conflict Personalities: An Overview

Module 5

Disorder Type #1 - The I'm Superior, You're Nothing Type
– **Narcissistic Personality Disorder**

Module 6

Disorder Type #2 - The Love You, Hate You Type
– **Borderline Personality Disorder**

Module 7

Disorder Type #3 - The Cruel, Con Artist Type
– **Antisocial Personality Disorder**

Module 8

Disorder Type #4 - The Highly Suspicious Type
– **Paranoid Personality Disorder**

Module 9

Disorder Type #5- The Dramatic, Accusatory Type
– **Histrionic Personality Disorder**

Module 10

Dealing with Negative Advocates Who May Also Attack You

Module 11

Getting Help and Support from Others,
But Only Some Will Have the Empathy and Wisdom to
Help Guide You

Module 12

Five Categories of Condo/HOA Owner Behaviors:
Condo/HOA Type #1 - How to Respond to the
'Most Difficult and Abrasive'

Module 13

Condo/HOA Type #2 & Type #3 - How to Respond to
'A Little Difficult' and 'Almost Invisible'

Module 14

Condo/HOA Type #4 & Type #5 - How to Respond to
**'Agreeable and Followers' and 'Agreeable and
Leaders'**

Module 15

Capstone - Thorny Interpersonal Problem to Solve

Course 4 (Page 1 of 2)

Legal Basics and Board Member Due Diligence and Collaboration

15 Module Course Outline

Module 1

Know Enough about the Law to Discuss your Issues with your Local Condo/HOA Attorney

Module 2

The Fragile Governance & Legal Creature that can be Difficult to Sustain Over Time

Module 3

Long-Range Goals of Associations are Remarkably Similar – Especially by Age of the Association Properties

Creating a Framework for Board Members to Work Together, Follow the Business Judgment Rule and Solve Problems

Module 4

How to Foster a Respectful, Fair and Deliberative Mind-set in Board Members

Module 5

Writing a detailed manager job description and setting the right pay is essential

How to Organize Your Search for a Manager or Management Company and Interview Candidates

Module 6

Listen to outside expert opinions and owners on all sides of a problem

Be Cautious About Both Overzealous Enforcement or Taking No Action on Major Issues

Module 7

Trend of the future?

In a few U.S. States and Canadian Provinces

State Condominium Ombudsperson Offices: Benefits and Limitations

Module 8

What is Your Association's Process for Resolving Complaints?

Module 9

Competitive Bidding

- *What are the minimum legal requirements?*
- *What are fair and efficient business practices?*
- *How to be transparent & explain to owners that their money is being spent wisely?*

Course 4 (Page 2 of 2)

Legal Basics and Board Member Due Diligence and Collaboration

15 Module Course Outline

Module 10

The Instructor's Formative Experience:

**How Lower-Income Condo Owners Collaborated
and Sustained Their Affordable Housing**

Module 14

*How to Make these Annual Events Less Combative
and Stressful*

The Annual Meeting, Voting and Elections

Module 11

Avoiding Ethical Breaches and Conflicts of Interest

Fiduciary Duty & the Business Judgment Rule

Module 15

Capstone - A Thorny Legal Problem to Solve

Module 12

Pet and Parking Rules are Two Common Examples:

**Reasonable, Clearly-Written 'House Rules' Help
Reduce Misunderstandings & Conflicts
with Hot-Button Issues**

Module 13

Key State Condo and HOA Laws for Kentucky

Course 5

Financial Planning to Sustain the Property and Promote Harmony

15 Module Course Outline

Module 1

Getting Started

Module 2

Annual Budget Creation & Approval

Module 3

Monthly Review of Financial Statements

Module 4

Financial Safeguards: Sometimes Ignored but Vitally Important

Module 5

Collections, Liens, Foreclosures

Module 6

What is a Receivership?

Module 7

Financial Duties of the Board Treasurer & Property Manager

Module 8

Local Insurance Agent Duties & Overview of Insurance Business Systems

Module 9

The Complex Task of Bidding your Insurance Business

Module 10

Bookkeeper Duties versus Certified Public Accountant (CPA) Duties

Module 11

Working with Bankers: Understanding the Basics

Module 12

Reserve Study Provider Duties

Module 13

Gathering Data for Condo/HOA Disclosure Forms from Simple to Complex

Module 14

Communicating Financial Data to Owners

Module 15

Capstone - A Thorny Financial Problem to Solve

Congratulations!

You have earned your CCHOAM™ Designation –
Chartered Condominium &
Homeowner Association Management
Certificate Training

