

WORKING EFFECTIVELY WITH PROPERTY MANAGEMENT

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ENTERPRISE SPONSOR



Minnesota Property Management.



SHAUN ZAVADSKY
FIRSTSERVICE RESIDENTIAL
(952) 277-2700
fsresidential.com/minnesota



By Board Leaders. For Board Leaders.

Homeowner Roles - Basics

- Be informed / access to Board Meetings (Open Meeting)
- Have access to governing docs, annual report, financials, etc.
- Elect Board of Directors / Participate as Board members
- Amend and approve governing documents
- Approve Special assessments (if docs require)
- Use and enjoyment of common areas
- Pay assessments
- Maintain proper HO-6 coverage
- BE RESPECTFUL OF FELLOW HOMEOWNERS / BOARD / MGMT



Who Does What?

In a Nutshell

The Manager listens, gathers information and presents it to the Board. The Board discusses the information and comes to an informed decision and communicates that to the Manager, who then implements that decision.

Lawn & Snow

- 1 Performed in Bulk; not same as SF
- 2 Review contracts / trigger depth / fert.
- 3 Snow Removal / Back Dragging
- 4 Shoveling – Trigger Depth
- 5 Salt Buckets



Violations

- 1 Used as corrective action / not punitive
- 2 HO responsible for understanding docs
- 3 Right to Hearing with Board
- 4 Management Relies on Owners & BOD



Architectural Requests

- 1 Procedure in Declaration
- 2 Wait / Review Time
- 3 Ensure plan followed
- 4 If not done correctly HOA may require costly repairs / removal



The Role of the Association Manager

The role of the association manager is to **implement** the decisions and policy established by the board of directors, to **oversee** the day-to-day business of the association and to **administer** the programs, services, and activities of the association as established in its governing documents and as amplified or clarified by resolution of the board of directors or vote of the members.



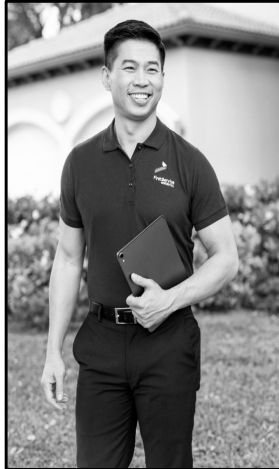
Working with your Association Manager

Roles defined for collaborative success

"Advisor" vs. "Order Taker"

Helps BOD enforce Governing Documents

Provides assistance with operational and financial matters



Implements BOD Decisions

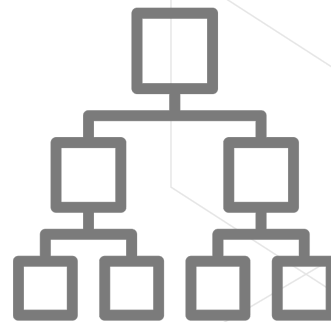
Oversees day-to-day operations

Customer Focused Resident Liaison

The Role of the Management Company

Working together to create a thriving community

- Supports the Association Manager
- Behind-the-scenes support
- Advocacy
- Mentors
- Experts
- *****Vendor Management*****



The Role of the Management Company

We're more than just your manager...

- 100+ years combined leadership experience
- Bulk Contracting Team for best pricing
- Accounting Services & Collections
- Insurance Team
- Financial Experts / Loans / Investing
- 8 HR Professionals/Recruiters/Trainers to support the manager and sited associates



The Role of the Management Company

We're more than just your manager...

- Team Approach
- Staffing Challenges
- Accounting Challenges
- Ancillary Charges – why do they exist?
- Maintenance & Construction Arms



“

*The path to avoiding conflict
in your community begins
with a proactive and
intentional approach.”*



Why Partner with a Professional Manager?



Reasons for partnering with a professional manager vary widely:

- Size of the community association.
- Lack of time, skills or interests of residents to perform what needs to be done.

Professional Management Limitations

What managers should **not be required** or **expected** to do:

- Perform duties specifically assigned to the board by the governing documents
- Sign checks over a set amount without authorization
- Waive rules or negotiate with residents about rules without good reason
- Oversee the annual audit
- Serve as the final authority in hiring or terminating contractors
- Initiate the filing of a lien against a homeowner
- Dispense legal advice or other advice outside their areas of expertise

Professional Manager Qualifications

CMCA

Passed the CMCA exam and comply with the CMCA Standards of Professional Conduct

AMS

Passed the CMCA exam, completed at least 2 CAI education courses and managed community associations for at least 2 years

PCAM

Passed the CMCA exam, completed 6 education courses, passed the Case Study and managed community associations for at least 5 years

LSM

Earned the PCAM, met educational requirements, managed associations for 10 years, and managed a large-scale association for at least 5 years

AAMC

Have PCAM as company's senior manager and at least 50% of managers hold a credential

How to Solicit Bids for Management

Questions to Ask During the Process...

- How many associations does each manager oversee?
- How do you handle non-responsiveness from manager?
- Timing of responses? Board and Homeowner
- Can you save us money?
- Site Visits, Project Coordination, & Board Meetings
- FirstService can assist with a formal RFP



Common Pitfalls to Avoid

- Additional costs; hidden or disclosed
- Lack of Training for Managers & Board
- No designated associates
- High manager turnover
- Lack of Team Support
- Dissatisfied Vendors
- No Accountability

