

SO YOU'VE BEEN ELECTED TO THE BOARD

I. STRATEGIC PLANNING

- A. Helps an association not just survive but thrive.
- B. Proactive approach to thinking
- C. Creating a foundation on which to build your goals.
- D. Then four simple elements of a strategic plan
 - 1. List of Objectives
 - 2. SWOT (Strengths, Weaknesses, Opportunities and Threats)
 - 3. Brand Identity
 - 4. Strengths and Tactics
- E. Execution

II. COMMUNICATION AND TRANSPARENCY

- A. Openness with all unit owners
- B. Communication starts with easy things.
 - 1. Meeting notification
 - 2. Newsletters
 - 3. Memo and minute distribution
 - 4. E-mail
- C. Transparency

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Strategic Planning and Communication

I. Strategic Planning

Strategic planning helps an association not just survive, but thrive. Part of this plan needs to be the development of a business plan which enables an association to reach systematically toward a future that conforms with the vision, mission and values of the members.

Strategic planning is a way of thinking. It is taking a proactive approach rather than a reactive approach to operations and decision making. The strategic plan is a tool, a vision. Strategic planning is a tool for optimal, organized management. A strategic plan is “charting the course for tomorrow”.

A strategic plan is what you look at to decide how you're going to get your association from where it is today to where you want it to go in the future. It helps you set and eventually act upon the goals you have set. Strategic planning creates a foundation upon which to guide your association in the future, whether it is a one, three, five or ten year plan.

The four (4) simple elements of a strategic plan are:

1. List of Objectives

If you don't know where your target is, how can you aim for it?

Example: building a reserve fund

2. SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis

To get where you are going tomorrow, where are you today?

3. Brand Identity

What kind of association are you? (middle-income, ultra-rich, etc.) What kind of a image are you trying to project?

4. Strategies and Tactics

How are you going to get where you **want to be**?

Although planning is key, proper execution of that plan is essential. Once you have your plan, you need to develop your roadmap to get there.....setting timeframes. Finally, this plan, or set of plans, should be revisited every twelve months.

II. Communication and Transparency

Although the Board is the entity responsible for making decisions on behalf of the unit owners, the Association still belongs to the homeowners and they have a right to be fully informed about the Association and how it is operated. The Board must keep detailed and accurate records, and the homeowners should have reasonable access to these records for a proper purpose and consistent with the requirements of condominium laws.

Communication starts with easy things, such as posting meeting notices, writing and distributing newsletters, memos and minutes....openly reporting on the Board's activities. Proper and timely communication helps the unit owners understand the decisions the Board makes.

The Board must be transparent in how they run the Association. This means conducting business at open meetings and voting on issues in front of the members who choose to be at these meetings.

Your decisions may not always be popular but as long as they are done openly, honestly and in the best interest of the community, a Board can only hope for a harmonious community.

HOMEOWNERS FORUM: 7:45AM - 8:45AM (O'HARE THEATER)

For association Board Members and Homeowners only! Share ideas and concerns and bring your questions. Panel includes Boyd Briscoe, Homeowner and CAI-Illinois Board Member, Mark Cantey CPA of Mark Cantey Associates, Michael C. Kim Esq. CCAL of Michael Kim & Associates.

EDUCATIONAL SESSION I: 10:10AM - 11:10AM

For General Audiences:

- Session 1A: Insurance (DFW ROOM A), Presented by Jim Constantine of James B. Constantine Insurance Agency, Barbara Wick, CIRMS, CPCU, ARM, AIS of CARMIC, LLC
- Session 1B: Capital Improvements - To Do or Not To Do (DFW ROOM B), Presented by Frank Coleman, CMCA® of Community Advantage of Barrington Bank & Trust, Katherine Susmilch of Mastercare Building Services, and Mark Waldman of Waldman Engineering Consultants, Inc.
- Session 1C: 12 Mistakes a Board Makes (O'HARE THEATER ROOM), Presented by Gabriella R. Comstock, Esq. of Keough & Moody, P.C., Kara Cermak, CMCA®, AMS®, PCAM® of Rowell, Inc., Chris Nyborg of Nyborg & Company, Ltd.

For Community Managers:

- Session 1D: Elevators for the Suburbs (UNITED ROOM A), Presented by Bob Capuani, Illinois State Fire Marshal and Jim Aubin
- Session 1E: Elevators for the City (LAX ROOM A), Presented by Richard Monocchio, Commissioner of Department of Buildings City of Chicago

EDUCATIONAL SESSION II: 11:20AM - 12:20PM

For General Audiences:

- Session 2A: Budgets and Reserves (UNITED ROOM B), Presented by Steven Silberman, CPA of Frost, Ruttenberg & Rothblatt, P.C., Greg Lason of Waldman Engineering Consultants, Inc., Edward Cortless of Wentworth Management
- Session 2B: So...You've Been Elected to the Board (DFW ROOM A), Presented by Charles T. VanderVennett, Esq. of Law Office of Charles T. VanderVennet, P.C., Shirley Feldmann of Association Advocates, Inc., Tom Skweres, CMCA® of Wolin-Levin, Inc., Aurelio Lee of Allan-Odis Inc.
- Session 2C: Foreclosures and Bankruptcies (O'HARE THEATER), Presented by Stuart Fullett, Esq. of Fosco Fullett Rosenlund PC, Julie Jacobsen, Esq. of Kovitz Shifrin Nesbit, Matthew Goldberg, Esq. of The Law Office of Matthew J. Goldberg

For Community Managers:

- Session 2D: Insurance (DFW ROOM B), Presented by Charles J. Hruska III of Hruska Insurancenter, Inc., Julie Demos of Total Insurance Services, Inc.
- Session 2E: Newest Codes for Chicago Buildings (LAX ROOM B), Presented by Lou Lutz, CMCA®, AMS®, PCAM® of Legum & Norman Mid-west and Jose Aparicio, City of Chicago

EDUCATIONAL SESSION III: 1:40PM - 2:40PM

For General Audiences:

- Session 3A: Avoiding Financial Fraud (UNITED ROOM A), Presented by Lara Anderson, Esq. of Tressler LLP, Brad Schneider CPA of CondoCPA, Arten Lasinsky, CPA of Frost, Ruttenberg & Rothblatt, P.C.
- Session 3B: Post Developer Turnover (LAX ROOM A), Presented by Angela Falzone of Association Advocates, Inc., John H. Bickley III, Esq. of Kovitz Shifrin Nesbit

For Community Managers:

- Session 3C: Stress Management (O'HARE THEATER), Presented by Todd Huston, Keynote Speaker

EDUCATIONAL SESSION IV: 2:50PM - 3:40PM

For General Audiences:

- Session 4A: Green Associations (UNITED ROOM B), Presented by Angela Ford of T.A.G. Worldwide, Inc., Elena Lugo of Wolin-Levin, Inc.
- Session 4B: How NOT to Collect Assessments (LAX ROOM B), Presented by Dawn Moody, Esq. of Keough & Moody P.C., Jessica Ryan, Esq. of Kovitz Shifrin Nesbit, Katerina Tsoukalas-Heitkamper, Esq. of Fosco Fullett Rosenlund PC
- Session 4C: Manager Licensing (O'HARE THEATER), Presented by Mark Pearlstein of Levenfeld Pearlstein LLC

LEGAL UPDATE: 4:00PM - 5:00PM For General Audiences (O'HARE THEATER), Presented by Mark Pearlstein, Esq. of Levenfeld Pearlstein LLC, Allan Goldberg, Esq. of Arnstein & Lehr