



# Management + Leadership = Training, Part 3

## Training the Manager

by Betsy Barbieux

**W**hile there are no statutory requirements that a community association hire a manager, there are statutory licensing requirements of individuals who are paid to manage by an association. **Chapter 468, PART VIII, Section 468.431(2), defines management as:**

...any of the following practices requiring substantial specialized knowledge, judgment, and managerial skill when done for remuneration and when the association or associations served contain more than 50 units or have an annual budget or budgets in excess of \$100,000: controlling or disbursing funds of a community association, preparing budgets or other financial documents for a community association, assisting in the noticing or conduct of community association meetings, and coordinating maintenance for the residential development and other day-to-day services involved with the operation of a community association. A person who performs clerical or ministerial functions under the direct supervision and control of a licensed manager or who is charged only with performing the maintenance of a community association and who does not assist in any of the management services described in this subsection is not required to be licensed under this part.

**Section 468.431(3) defines a manager as:**

...a person who is licensed pursuant to this part to perform community association management services.

**Section 468.432(1) says:**

...A person shall not manage or hold herself or himself out to the public as being able to manage a community association in this state unless she or he is licensed by the department in accordance with the provisions of this part.

The Florida Statutes and the Florida Administrative Code require that your licensed manager receive up to 24 hours of prelicensing education. They also require your manager to complete 20 hours of continuing education every two years in order to maintain a current license. Required courses relate to recent legislation, case law, and regulations impacting community association management, insurance and financial management, operation of the physical property, and human resources topics such as disaster preparedness, employee relations, and communication skills for effectively dealing with residents and vendors.

Managers must adhere to standards of professional conduct in the areas of the proper use of association funds, honesty, professional competence, due professional care, control of others who work with him, and proper maintenance of the association records.

A manager's job description should be broad enough to allow discretion in his decisions, but should at least address duties related to administration, budgeting, procurement, contracts, accounting, maintenance, capital improvements, personnel, and recreational facilities and programs.

Boards of directors and managers should meet periodically to review the manager's performance. Following is a sample Performance Review:

The following are suggested items to be used during the performance review of your licensed Community Association Manager (CAM). Items should be added or deleted to personalize the review so it will provide appropriate dialogue and feedback between the president and the manager.

For the best results, the manager should complete the evaluation on him/herself and the president of the association should complete the evaluation of the manager. After both have completed the evaluations, areas of discrepancy would be the logical topics to discuss.

**Rate each component between 1 and 5 with 1 being best, yes, or most favorable, and 5 being least, no, or unfavorable. Items that are not applicable should be marked N/A.**

- 1 2 3 4 5 Communicates sufficiently, orally or in writing, with owners, residents, volunteers, and contractors
- 1 2 3 4 5 Maintains a positive, cordial, business-like relationship with owners and tenants
- 1 2 3 4 5 Satisfactorily oversees contractors working on the property
- 1 2 3 4 5 Routinely inspects the property for maintenance and repair needs
- 1 2 3 4 5 Performs or oversees the basic administrative tasks for the association
- 1 2 3 4 5 Works without supervision
- 1 2 3 4 5 Works cooperatively with other staff members and volunteers
- 1 2 3 4 5 Demonstrates proficiency using technology (computer, software, email, etc.)
- 1 2 3 4 5 Maintains a safe work environment
- 1 2 3 4 5 Provides timely financial reports
- 1 2 3 4 5 Demonstrates ingenuity in developing solutions to multiple problems
- 1 2 3 4 5 Develops controls to prevent future problems
- 1 2 3 4 5 Uses good analytical ability in reviewing budgetary and usage data to determine meaningful trends or problems
- 1 2 3 4 5 Adequately presents/explains the data or results to personnel, directors, or residents not versed or trained in this area
- 1 2 3 4 5 Uses good analytical skills when compiling and analyzing supporting data
- 1 2 3 4 5 Makes reasonable recommendations using supporting data
- 1 2 3 4 5 Makes equitable decisions required in the course of implementing the association's policy and procedures
- 1 2 3 4 5 Tactful when making recommendations concerning solutions to problems and procedures

Overall, the Manager has a working knowledge of:

- Y / N Management procedures and techniques
- Y / N Accounting procedures
- Y / N Personnel practices
- Y / N The rules, regulations, and standards of the association
- Y / N Inventory and procurement
- Y / N Contract relations
- Y / N Property maintenance as it pertains to the association
- Y / N Current maintenance procedures and practices
- Y / N Safety hazards and practices
- Y / N Environmental issues
- Y / N Insurance
- Y / N Taxes
- Y / N Disaster preparedness
- Y / N Local permitting codes and regulations
- Y / N Human behavior; conflict prevention/resolution

**Noteworthy accomplishments this past year:**

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**Areas that need improvement:**

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Managers have the opportunity to sharpen their skills by attending approved continuing education classes, management certification courses sponsored by CAI (Community Association Institute), courses offered by local colleges and universities, and networking with other local community association managers.

Networking with local managers is a great way to receive support and understanding for what you

do. Community association management can be a very trying occupation! Each locale has its own culture and each community within that locale has its own culture. Most managers find it beneficial to discuss their particular local trends, common issues, and brainstorm solutions.

As food for thought and discussion at your next networking meeting, test your managerial skills (agree or disagree with each statement):

- It's unnecessary for a manager to discuss long-range goals with team member subordinates. As long as team members are aware of the immediate objective, they can do their work effectively.
- The best way to make a reprimand effective is to belittle an offender in front of co-workers.
- Managers appear ignorant and risk losing face if they answer a question with, "I don't know, but I'll find out and let you know."
- It pays for managers to spend a great deal of time with a new employee to ensure that training has been effective.
- Managers should ask their associates for ideas about work methods.
- When disciplining is required, managers should avoid saying or doing anything that may cause resentment.
- People work best for firm managers.
- It's more important for a team to be composed of members who like their jobs than of people who do their jobs well.
- Work gets done more efficiently if managers lay out plans in great detail.
- To lead an effective team, managers should keep in mind the feelings, attitudes, and ideas of the team's members.



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## Answers

- **Disagree.** People who know where they're going, who can see the big picture, are more committed and will work harder to reach those objectives than people who are aware only of immediate goals.
- **Disagree.** Flaying a person doesn't solve the problem; it only makes the person feel small in front of co-workers. A good reprimand shouldn't be humiliating. It's best to reprimand in private, never in front of others.
- **Disagree.** It's better to admit ignorance of a matter than to try to bluff. People respect leaders who accept that they don't know everything.
- **Agree.** The most important step in developing the full capabilities of associates is

good training on the part of managers. Managers who invest the time to lay a solid foundation in the beginning will reap huge returns—employees who are valuable assets to the organization.

- **Agree.** People directly involved with the job can often contribute good ideas toward the solution of problems related to their work.
- **Agree.** Resentment creates low morale and often leads to conscious or subconscious sabotage.
- **Disagree.** Toughness is not as important as fairness or an inspiring attitude.
- **Disagree.** The happiness and satisfaction of team members are important, but they are secondary to getting the job done.
- **Disagree.** Psychologists have shown that most people work better when they are given broad project guidelines and can work out the details themselves. But there are some people who work better when tasks are given to them in detail. Good managers recognize the styles in which people work and then adapt to them.
- **Agree.** Communication is a two-way street. To manage effectively, it's important to know what team members are thinking and how they feel about their jobs.

Smart managers take every opportunity to train themselves; more than is required by the statutes. Just remember to keep your training S.M.A.R.T. (Simple, Meaningful, Attitude, Respectful, and Thoughtful)

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