community
ASSOCIATIONS INSTITUTE

CAI TENNESSEE CHAPTER (CAI-TN)
2023 BOARD LEADER CERTIFICATE COURSE

YOU'RE ON THE BOARD OF DIRECTORS - NOW WHAT?

What: Board Leader Certification Course **August 3rd, September 7th, October 5th, November 2nd, and December 8, 2023.**

Where: **Bearden Banquet Hall, 5806 Kingston Pike, Knoxville, TN 37919**

When: Five sessions in 2023. To Register: scan the QR code or email renee@hoatn.com

This course is designed to help Board members understand their role in their community associations, and to give them practical tools to be effective leaders. It is offered to Board members of community associations that are served by management companies which are members of the Tennessee Chapter of the Community Associations Institute (CAI-TN). **The Cost is $20 per person per session and includes breakfast for each session.**

Board members do not have to be members of CAI to participate.

Each session will begin at 9:00 am and will last between 90 minutes and 2 hours.

All sessions will be presented by recognized professionals in the community association industry, in an informal style that will encourage participation and questions.

To demonstrate its commitment to supporting the ongoing education of community association leaders in East Tennessee, CAI-TN will have available the Board Member Tool Kit. Each attendee has the opportunity to receive a package of reference material, including a workbook and several handbooks on such topics as meetings and financial management for an additional cost of $20. There will be a limited supply at the first session.

Board members are invited to register for each session individually, and do not have to attend all five. However, Board members who do attend every session will receive a Board Leader Certificate from the Community Associations Institute.

Breakfast will be provided by sponsor members of CAI-TN.

Board members of all types of community associations - including HOAs, condominiums, mixed use and Master Associations - will find these classes useful. See the following page for a summary of the topics and dates.

CAI-TN

BOARD LEADER CERTIFICATE COURSE 2023

August 3 (Thursday) Governing Documents and Roles & Responsibilities
Board members will learn to be able to identify, read and discuss the basics of governing documents, and understand the different types of property ownership in community associations.
- The types of documents and the order of their authority
- Functions, roles and responsibilities of the Board, the officers and the managing agent
- Types of committees and their roles
- When to seek guidance of professional partners

September 7 (Thursday) Communications, Meetings and Volunteerism
Board members will analyze and apply factors that contribute to effective communication, preparing for and conducting meetings and motivating homeowners to participate.
- Recognize four factors for assessing a leader's communication effectiveness
- Requirements and effective practices for conducting meetings and elections
- Three ways to build volunteerism – with examples

October 5 (Thursday) Fundamentals of Financial Management
Board members will learn effective practices for protecting the association's assets, preparing budgets, using reserve studies for financial planning, and determining and collecting the assessments needed for the organization to function smoothly.
- Reserve Studies: planning for the future
- Preparing a budget
- Collecting assessments

November 2 (Thursday) Professional Advisors, Service Providers and Insurance
Board members will learn about effective practices for selecting appropriate professional advisors and service providers. Also, an insurance specialist will discuss the types of insurance coverages needed for community associations, including Directors and Officers.
- Evaluating service providers
- Extending an offer and accepting bids
- Things to consider when obtaining insurance

December 8 (Friday) Association Rules and Conflict Resolution
Board members will learn to recognize and apply the criteria needed to determine whether rules already adopted or proposed are valid under the association's documents, with consideration of applicable state and federal laws. Attendees will also evaluate the procedure for developing, adopting, and enforcing rules. They will also compare methods to resolve conflicts to avoid litigation when possible.
- Six criteria to determine whether a rule is valid, and procedure for developing rules
- Steps for enforcing association rules