



**CAI TENNESSEE CHAPTER (CAI-TN)
2024 BOARD LEADER CERTIFICATE COURSE**

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

What: Board Leader Certification Course **April 17, May 9th, June 12th, August 14th, and September 18th, 2024. No Charge!!**

Where: **Maggiano's Little Italy, 3106 West End Avenue, Nashville TN 37203**

When: Five sessions in 2024. To Register Email: fellis@caitenn.org

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 at no cost 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).

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

Each session will begin at 11:30 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 Middle Tennessee, CAI-TN is underwriting the cost of the Board Member Tool Kit. Each attendee will receive a package of reference material, including a workbook and several handbooks on such topics as meetings and financial management.

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.

Lunch at Maggiano's 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 2024

April 17 (Wednesday) 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

May 9 (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

June 12 (Wednesday) 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

August 14 (Wednesday) 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



September 18 (Wednesday) 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