

Common Interest

The Official Publication of CAI-Connecticut

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Who Is CAI?

The Connecticut Chapter is one of 60 Community Associations Institute chapters in the nation. CAI-CT serves the educational, business, and networking needs of community associations throughout Connecticut. Our members include community association volunteer leaders, professional managers, community management firms, and other professionals and companies that provide products and services to associations. The Connecticut Chapter has over 900 members including nearly 150 businesses, and over 450 community associations representing 50,000 homeowners.



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To submit an article for publication in *Common Interest* contact Kim McClain at (860) 633-5692 or e-mail: kim@caict.org.

President's Message



Donna Rathbun, CMCA

"It's never too early to start thinking about planning for attending CAI-CT programs in 2018."

As we turn to fall there are still several opportunities to spruce up the properties before the leaves all fall and the colder weather starts to settle in. All the painters and carpenters are busy trying to finish last minute projects to help keep the communities looking their best and keep up the resale values! All the while, communities are starting to plan for the coming year with upcoming elections, annual meetings, budgets and projects for next year.

It's never too early to start thinking about planning for attending CAI-CT programs in 2018. Best practices for running an association would dictate that including a line item in your budget for education is essential. We hope that you have been recruiting new and old board members to attend our upcoming Conference & Expo on March 17, 2018 and also our Condo Inc. I program on January 20, 2018. A well-educated board is more than likely a well-functioning board.

Fall Fun and the CAMMies were held again at the Aqua Turf in Southington. Congratulations to the 2017 award winners for Rising Star — Lynn Jackson, CMCA, AMS, from the Property Group of Connecticut; Community Association Management Executive of the Year — Kevin Hellriegel, CMCA, AMS — from Heritage Village; and Manager of the Year — Steve Cabaniss, CMCA — from Westford Real Estate Management, LLC. A big thank you from all of us at CAI-CT for your professionalism and a job well done!

Enjoy the fall foliage, hot cider, and Happy Thanksgiving! ■

Attention CAI-CT Members!

You should have received an email from caict@caict.org
Subject: Member Directory.

Please check this email to ensure our contact information for you is correct.

Deadline:
December 1, 2017

Thank you!



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From the Chapter Executive Director

"Excellence is to do a common thing in an uncommon way."

~ Booker T. Washington



Kim McClain

Courtesy CAI-CT.

Although it seemed to take quite a long time for the crisp fall weather to arrive, we can now enjoy all the season has to offer: beautiful foliage, warm fires, apple crisp and the crunching of numbers as you prepare your annual budget. Ah yes, a wonderful time of year!

If your common interest community understands how the use of best practices in operations adds greater value to the community both in terms of real estate prices as well as the overall well-being of community then it stands to reason that there is a line item for education in your budget. How can any community possibly be up-to-date with: changes in law; new products and services for saving time and money; and creative ideas for getting owners to cooperate with the board? Membership in CAI-CT will reap many rewards for your association with a relatively low number on the expense side.

Joining CAI has never been easier! New pricing for Homeowner Leaders went into effect on October 1. Now up to 15 board/committee members can join for only \$250. Greater access to information should lead to better decisions from the board. If you know of associations that could benefit from being a part of CAI-CT— send them our way!

You have probably noticed that we are including new authors in our magazine all the time. Do you have an article you would like to share with us? We love to feature our members on these pages! Send your copy to: kim@caict.org.

Enjoy the Fall! ■



In Memoriam: ARTHUR CYR



Arthur Cyr, 67, passed away Sunday, September 10, 2017, after a long, valiant battle with cancer.

Art was retired salesman and community activist. For many years, Art served as President of his condo association. He was active with CAI-CT and served on our Trade Show committee in the early 2000s.

After Art retired, he devoted his life to Town of Southington. He frequently attended 20 or more town meetings each month, always keeping the best interests of the town as his first priority. His passion and determination will be greatly missed. ■

UPCOMING CAI-CT EVENTS

CAM Ed – Jumpstart January Legal Panel

Thursday, January 11, 11:30 am – 1:30 pm
Snow Date January 18, 11:30 am – 1:30 pm
Wallingford, CT

\$25 - CAI Members, \$50 - Non-Members

GOOD FOR 2.0 CONTINUING ED CREDITS

Condo Inc. I: The Business of Running Your Community

Saturday, January 20, 8:30 am – 3:00 pm
Snow Date: Saturday, January 27, 8:30 am – 3:00 pm
Glastonbury, CT

Do you serve on the board of your association?
Are you considering serving? Whether you are a seasoned board member, a recently elected board member or unit owner seeking to understand more about how an association runs, this course is for you!

\$50 - CAI Members, \$100 - Non-Members

GOOD FOR 6.0 CONTINUING ED CREDITS

Sponsorships are available for this event.

SAVE THE DATE! CAI-CT Annual Conference & Expo

Saturday, March 17, 2018
Aqua Turf, Plantsville, CT

Reservations for Booth Space
& Sponsorships now being accepted.

GOOD FOR 4.0 CONTINUING ED CREDITS

Condo Inc. I: The Business of Running Your Community

Saturday, April 28, 8:30 am – 3:00 pm
Danbury, CT

Do you serve on the board of your association?
Are you considering serving? Whether you are a seasoned board member, a recently elected board member or unit owner seeking to understand more about how an association runs, this course is for you!

\$50 - CAI Members, \$100 - Non-Members

Sponsorships are available for this event.



**Visit www.caict.org to register
and for updated information.**

Statutory Snippet...



Connecticut General Statutes: Sec. 47-250

Public Comment – Every association board meeting must allow for public comment regarding “any matter affecting the common interest community or the association.” The board may create a policy regarding the amount of time per person and total time allotted for this portion of each meeting.

People in the News:



Greg Zajac (left) and Tony Denorfria — President of Homebuilders & Remodelers of Central Connecticut.

Greg Zajac, owner of Building Renewal, LLC, won the prestigious 2017 REMODELER OF THE YEAR Award from the Homebuilders & Remodelers of Central Connecticut at their September 28, 2017 Annual Awards Night.

Greg is a member of the CAI-CT Board of Directors and also serves on our Conference Committee.

Congratulations Greg!



**Share your news with CAI-CT.
Send it to kim@caict.org.**

NEW & RENEWING MEMBERS

Welcome New Members

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O'Meara Ridge Condominium Assn., Inc.

Individual Managers

Luis Bruno
Christopher John Caprio
Ria Sookram

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Thank You Renewing Members

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East Mountain Village Condominium Assn., Inc.
Forest Glen Condominiums of Middletown Assn., Inc.
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Hunters Run Condominium Assn.
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Website Insights – Facebook



Did you know that CAI-CT has a facebook page? You can link to the CAI-CT facebook page by clicking on the icon at the top right corner of www.caict.org.

Check out the pictures from the Legal Symposium, Fall Fun and Summer Sizzler. Follow us and be sure to tag yourself!

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Danbury, Connecticut

Legally Speaking...



Adam Cohen, Esq.

Getting the Most from – and Paying the Least to – Your Association’s Attorney

By Adam J. Cohen, Esq.

Sooner or later, every association needs legal services. The board’s responsibility is to find a competent attorney with experience in the law of community associations and to work cost-effectively with that attorney for the benefit of the entire organization. It’s up to the officers to properly supervise every aspect of the relationship, from communication and implementation to monitoring the fees charged.

The foundation of this relationship is understanding that the association’s attorney does not represent the board, the officers, the unit owners, or any other individuals. Instead, the attorney’s client is literally the “association” itself – the organization (usually a nonstock corporation) made up of all of those people. The attorney takes direction from the board and relies on the board for communications, but his or her job is to act and advise in the best interests of the community as a whole.

This may mean that the attorney must tell the board that they’re wrong, such as when a unit owner properly complains that certain procedures have not been followed. It may also mean that the attorney must refuse to obey an individual board member whose opinion differs from a majority of the other board members. The association’s attorney can’t answer personal legal questions from unit owners or board members, and may even be ethically obligated to inform the board if those questions affect their relationship with the association itself. After a new board replaces an old one, the attorney must work with the incoming members and not the former ones, even if the change was the result of an insurgency which the previous board had opposed.

Since the attorney represents an organization rather than individuals, identifying a single liaison is usually the best way to maintain a clear and consistent line of communication. When the president, manager, and other officers are all in contact with the lawyer separately, the information becomes redundant, incomplete, biased, or even contradictory, which drives up costs and risk. The association can save money and prevent conflicts by selecting a particular person as the only one authorized to discuss legal issues with the attorney, and to do so only after the board compiles all of the relevant information cooperatively in advance.

When that liaison does contact the association’s attorney, he or she may need to remind the attorney of the association’s name (forgive us attorneys – we have hundreds of clients and might not immediately remember exactly which community you’re from) and include all of the relevant information and documents. The “bad facts” might be embarrassing, but hiding them from the attorney will make his or her



“Since the attorney represents an organization rather than individuals, identifying a single liaison is usually the best way to maintain a clear and consistent line of communication.”

advice unhelpful. Don’t just forward the attorney a long e-mail string – instead, succinctly explain the background of the problem and ask specific questions. Also, be careful not to copy anyone on an e-mail to or from the attorney who isn’t a board member or manager; this can waive attorney-client privilege and create another legal problem to solve. Always be sure that the attorney has the association’s fully updated declaration, bylaws, and rules including all amendments, since these will dictate how most legal situations must be handled.

Related to this is the critical need to get the attorney involved sooner rather than later. I can’t tell you the number of times a client has called me to fix a problem which could have been resolved or prevented for a fraction of the cost had I just been aware of it earlier on. The most common examples involve problems enforcing rules which were poorly drafted or procedurally flawed, disputes with vendors over bad contracts, thoughtless reuse of outdated forms, overblown fights with residents over petty issues, and reliance on online legal research by non-lawyers. It may seem like these save a money at the time, but in the long run, they can create bigger and more expensive legal problems in the long run.

The attorney must also be kept adequately informed from the beginning to the end of every legal issue. If the attorney is pursuing delinquent common charges, notify him or her immediately if the unit owner makes a partial payment, moves away, files bankruptcy, or does anything else which could have an impact on the matter. If the association engages a new management company, amends its governing documents, or has a significant change in board membership, the attorney should know this as well. Attorneys can't do their jobs cost-effectively if their files have inaccurate or outdated information about their clients or the issues they're facing.

Finally, following the attorney's advice is obviously important to keeping legal costs down. A lawyer is ethically obligated to ensure the client understands the most cost-effective solution to a problem, including how to minimize legal fees. If the board chooses not to follow the attorney's advice, it should make certain the attorney knows it, so that he or she can still tailor follow-up advice appropriately. Attorneys will usually assume their clients are following their recommendations, and basing new advice on that incorrect assumption could be very costly for the client. Frequent, frank, and careful conversations with the association's attorney on every issue that could have legal consequences are always the best way for boards to get the most legal bang for their buck. ■

Adam J. Cohen is an attorney with the Law Firm of Pullman & Comley, LLC headquartered in Bridgeport, Connecticut. As the Chair of its Community Associations Section, he represents and gives seminars to condominiums, tax districts, and other communities in matters ranging from amendments of governing documents to revenue collection strategies and commercial disputes.

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Financially Speaking...



Daniel Levine, CPA

Financial Dashboards and Their Use for Associations

By Dan Levine, MBA, CPA

When serving on the board of directors as treasurer you will have access to a wealth of financial information and data. Depending on the breadth and complexity of the financial data, it can be challenging to know what you as a volunteer need to focus on. Equally challenging is the task of communicating what this financial information means and what next steps the rest of the board may need to take.

Enter the financial dashboard.

What is a Dashboard?

The best way to understand a financial dashboard is to compare it to a dashboard that everyone is familiar with: the car dashboard. When driving on the highway in heavy traffic a driver does not have time to contemplate detailed analysis behind the various car components when making quick decisions about lane mergers, etc.

Therefore, the car dashboard was created to provide a snapshot of the most important aspects of the car. This way a driver can quickly understand the current state of the vehicle and if there are any issues that need correction. Do you need gas? Is the check engine light on? Are you speeding?

The car dashboard has the following key components:

- 1) It's easy to understand.
- 2) Provides relevant information for decision making.
- 3) Efficiently communicates information in a timely manner.

Turning back to a financial context, a financial dashboard should strive to hit the above areas as well, while reflecting your association's finances and financial goals.

What Financial Information Should You Include in Your Dashboard?

There are many different financial items that can be tracked by an association. The key is determining which items are the most important and relevant to decision making and no two associations will be completely the same in that regard.

Whichever goals are selected should be agreed upon by the board, be readily measurable, and be both short and long-term items. This will make the dashboard relevant and informative, not just more work for the volunteers.

Some areas the board may want to consider including in their dashboard:

- 1) Total reserve cash or investment balances compared to a reserve study expectation.
- 2) Total accounts receivable or prepaid common charge balance for the month as compared to the goal for those accounts.



- 3) Actual reserve contributions paid during the month as compared to budget.
- 4) Certain expenses the board wants to have more control over as compared to their budgets.
- 5) Current inter-fund loan balances as compared to expected payoffs or increases.

But wait, there's more!

Dashboards are not only used to present financial information, but they are well suited to present the status of non-financial information that the board would like to keep an eye on. Examples of non-financial information that can be included would be:

- 1) Total number of rental units in an association.
- 2) Total number of units charged late fees during the month.

[Continues on page 12.]



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FINANCIAL...from page 10.

- 3) Number of board volunteers.
- 4) Number of insurance claims during the year (a good goal here is always 0!).
- 5) Number of units still that are completed in a large project, such as roofing or siding.

Non-financial information can provide great leading indicators for financial information and could lead the board to make decisions that will avoid future problems.

For example, if the board has numerous claims it may need to review its maintenance plans and adjust, or pay attention to its insurance policy renewal for additional costs. Another example is how the number of units assessed late fees could be a leading indicator for collections at the association.

How to Create and Use a Dashboard

To create a dashboard the simplest and most widely used tool is an Excel spreadsheet.

Excel is a simple but powerful tool for data analysis. You can create fully automated charts and graphs based on the dashboard or simply list a financial goal/expectation of the Association in one row while reporting actual results in the row below it. The real work is determining what it should reflect.

Remember expectations are as important as actuals! Going back to the car example, if the fuel gauge sets no expectation of what side

means “full” or “empty” you won’t be able to know if you’re in trouble or not when reading the gauge!

As time goes on and actual results are obtained, if an item meets or exceeds expectations this will be an item the board won’t have to put so much focus on. If an item under-performs expectations this would likely be a focus for the board and require more management.

Conclusion

Understanding and presenting financial statement information can be a challenge for a volunteer to do. It is, however, a critical element both in board decision making as well as transparency for the community which the board represents.

Dashboards are an effective tool to focus attention and communicate whether an association is on target or action is needed on financial and non-financial items and they can be a simple time saving tool for board volunteers.

However, be mindful that the dashboard typically represents only selectively tracked items that are deemed important by the board. This can result in adjustments to what is included as time goes on and goals and needs of the association change. Additionally, while the summary presentation is beneficial, a dashboard will not replace the amount of information in a formal financial statement and those documents should still be reviewed in full by an association’s treasurer. ■

Dan Levine, MBA, CPA is a Certified Public Accountant at Tomasetti, Kulas, And Company P.C. Dan has extensive experience with tax and attestation services to condominium associations from all around Connecticut. Dan is an active participant in CAI-CT related events and can be found presenting accounting best practices at these events throughout the year. Dan is also a member of our Legislative Advocacy and Next Generation Committees.



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Every issue of *Common Interest* features an “Ask Mister Condo” Question submitted by a reader of the Ask Mister Condo website at <http://askmistercondo.com>. There are often many reasonable suggestions and solutions to condo questions. Mister Condo is asking you to participate and share your wisdom with the world. Review the question below and submit your answer in an email to askmistercondo@askmistercondo.com. Look for your answers in future issues of *Common Interest*. Here is this issue’s Ask Mister Condo question:

J.B. from Hartford County writes:

Dear Mister Condo,
I am new to our condominium board. The previous board never reviewed our property management company. I would like to do that on an annual basis – to assess their work and performance for the year. Do you have any suggestions as to how to do that (quantitative, qualitative) and who should do it (Board only, homeowners)? Thank you.

Editor’s Note: CAI has an excellent publication — *Management Companies: How to Find the Right Community Association Professional*



ISBN: 978-59618-017-8
2007
24 pages
Author(s): Michael E. Packard,
PCAM, CPM
Product Format: Book
Item #: 0178

Members: USD \$15.00
Non-Members: USD \$25.00

In a previous Ask Mister Condo column, you were asked to help a reader with the following question:

A.D. from Middlesex County writes:

Dear Mister Condo,
Hi. I live in a condominium complex that has several handicapped parking spots. Our board of directors recently enacted a two car per unit parking limitation. I am disabled and use one of our handicapped parking spots with a valid placard. Can the BOD legally tow my car from our parking lot while the placard is visibly displayed?

Mister Condo replies:

A.D., I am not fully sure I understand your question. Are you parking more than two cars on the common parking areas? If so, you are violating the new rule and the Board may have the ability to have your car towed for the infraction. If you are simply parking your car in a designated handicapped area and not violating the association’s two car rule or any other parking rule, I can’t think why you would think your car would be towed. If you are using your two car allotment for other vehicles AND you park your third car in the handicapped parking area, one of your extra cars (maybe your handicapped placard car) may be subject to towing as you are in violation of the association’s parking rules. Let’s hope it doesn’t come to that. Good luck!

What do you think of that question and answer? Visit us at <http://askmistercondo.com>. Follow us on Facebook and Twitter and join in the conversation!

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The CAMMies

Our 3rd Annual CAMMies Awards were presented as part of the Fall Fun event. Once again, there were many extremely qualified nominees, making the selection process very challenging.

2017 CAMMies Semifinalists

The 2017 Rising Star of the Year Award:

Lynn Jackson, CMCA, AMS - *The Property Group of Connecticut, Inc.*
 Rachael Rosario - *Westford Real Estate Management, LLC*
 Walter Palma, CMCA - *Plaza Realty & Management Corporation*

The 2017 Executive of the Year Award:

Mike Carrier, CMCA - *Somak Property Management*
 Kevin Hellriegel, CMCA, AMS - *Heritage Village Master Association*
 Sabrina Wentworth, CMCA, AMS - *Westford Real Estate Management, LLC*

The 2017 Manager of the Year Award:

Claudia Ainsworth, CMCA - *Imagineers, LLC*
 Josh Parsons, CMCA - *Sound Real Estate Services*
 Steven Cabaniss, CMCA - *Westford Real Estate Management, LLC*

Many Thanks to our CAMMies Committee for all of their terrific work!

Dave Pilon, Bouvier Insurance - *Chair*
 Bob Gourley, MyEZCondo
 Steven Berg Esq., Frankel & Berg
 Wayne Dow, Kevin Davis Insurance Services
 Andrea Dunn, Esq., Bender, Anderson & Barba, P.C.

And the winners are...

The 2017 Rising Star of the Year:

Lynn Jackson, CMCA, AMS

The 2017 Executive of the Year:

Kevin Hellriegel, CMCA, AMS

The 2017 Manager of the Year:

Steve Cabaniss, CMCA

Congratulations to ALL!



Donna Rathbun, CMCA - Imagineers, LLC, Lynn Jackson, CMCA, AMS - The Property Group of Connecticut, Dave Pilon - Bouvier Insurance



Donna Rathbun, CMCA - Imagineers, LLC, Dave Pilon - Bouvier Insurance & Kevin Hellriegel, CMCA, AMS - Heritage Village Master Association



Gary Gilbert, Rachael Rosario, Steve Cabaniss, CMCA, Deann Uberti, CMCA, Sabrina Wentworth, CMCA, AMS, Tammy Tallon, Patricia Puglia, Lon Brotman, PCAM, Reggie Babcock, Greg Roberts, CMCA - Westford Real Estate Management, LLC

Fall Fun

The warm Fall weather could not have been better for our Annual Night of Fall Fun. We had a great turnout with people from all corners of the state. The crowd was lively. As always, the food at the Aqua Turf was excellent. We had the special treat of watching a short dance performance by award winning Jean Walker from Crystal Restoration Services of Connecticut and her dance partner, Manuel Trillo.

Our fantastic Fall Fun Committee handled all of the many details of the evening with incredible energy and creativity. We are grateful to all of them!

Fall Fun Committee

Carrie Mott – *Bouvier Insurance - Chair*
 Kenneth Ursaki – *MHA Property Loss Advisors, LLC*
 Mea Anderon – *Crystal Restoration Services of Connecticut*
 Cindy Fisher – *Harbor Property Management*
 Bill Jackson – *BELFOR Property Restoration*
 Doug Miller – *Schernecker Property Services, Inc.*
 Greg Roberts – *Westford Real Estate Management, LLC*
 Marcy Ventresca – *New Look Painting & Construction*

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Apple

New Look Painting & Construction, Inc.
 Schernecker Property Services, Inc.
 The Property Group of CT, Inc.
 Windsor Federal Savings

Acorn

Adam Quenneville Roofing & Siding
 Harbor Property Management
 HQ Dumpsters & Recycling
 Prime Touch Services
 Servpro of Stamford
 Simsbury Bank
 Tamco Building Products, Inc.



(left) Ken Ursaki –
 MHA Property Loss
 Advisors, LLC &
 Carrie Mott – Bouvier
 Insurance



(right) Bob Gourley –
 MyEZCondo



(above) Fall Fun Committee – Bill Jackson – BELFOR Property Restoration, Kim McClain – CAI-CT, Donna Rathbun, CMCA – Imagineers, LLC, Cindy Fischer – Harbor Property Management, Marcy Ventresca – New Look Painting and Construction, Inc., Ken Ursaki – MHA Property Loss Advisors, LLC, Carrie Mott – Bouvier Insurance, Mea Anderson – Crystal Restoration Services of CT, Doug Miller – Schernecker Property Services, Inc., Ellen Felix – CAI-CT, Greg Roberts, CMCA – Westford Real Estate Management, LLC



(above) Brian Picard & Cara Brook, TAMKO Building Products, Inc., Alan Barberino, CMCA – Alan Barberino Real Estate, LLC, Jon Chappell, Esq. – Perlstein & McCracken, LLC

(below) Reggie Babcock – Westford Real Estate Management, LLC, Ron Barba, Esq. & Ed Hill, Esq. – Bender, Anderson & Barba, P.C.



(right) Next Generation Committee – Doug Miller – Scherkeker Property Services, Inc., Dan Levine, CPA – Tomasetti, Kulas, and Company, P.C., Josh Suzio – Bouvier Insurance, Karina Smith, CMCA – SOMAK Property Management, Mike Bouvier – Bouvier Insurance, Jon Gosnell, CMCA, AMS – Northeast Property Group, Inc., Chas Ryan, Esq. – Franklin G. Pilicy, P.C.



(above) Kelly Cipriano-Kimberly, Louise Ainsworth, Claudia Ainsworth, CMCA & Suzanne Berry, CMCA – Imagineers, LLC & Bill Ainsworth

(below) Ivan Shiffman – Ion Bank, Deb Fuller, CMCA, AMS – Northeast Property Group, Inc., Audrey Emanuel – FMI Paint & Chemical, Inc., Marcy Ventresca – New Look Painting and Construction, Inc.



Photos continue on the next page.

FALL FUN...continued from page 17.



(above) Jean Walker – Crystal Restoration Services of Connecticut and Manuel Trillo



(above) Mike Bouvier, Bouvier Insurance, Wendy Colleary – Windsor Federal Savings, Jack Phelan, Brian Kelly & Josh Suzio – Bouvier Insurance



(above) Pam Bowman, CMCA – Prime Touch Services, Rick Filloramo – National Consulting Group & William Mackey, CMCA, AMS, PCAM, RS – Becht Engineering BT, Inc.



(above) Sam & Heather Tomasetti & Dan Levine – Tomasetti, Kulas, and Company, P.C.

(right) Barbara Hager, Esq., Kristi Leff, Esq., & Andrea Dunn, Esq. – Bender, Anderson & Barba, P.C. and Ellen Sias – Total Asset Management, LLC





(above) Sabrina Wentworth, CMCA, AMS & Racheal Rosario – Westford Real Estate Management, LLC



(left) Mike Cody – BELFOR Property Management & Brian Kelly – Bouvier Insurance

(below) Jean Walker – Crystal Restoration Services of Connecticut and Manuel Trillo



(above) Steven Cabaniss, CMCA – Westford Real Estate Management, LLC, Claudia Ainsworth, CMCA – Imagineers, LLC & Josh Parsons, CMCA – Sound Real Estate Services

(below) Rachael Rosario – Westford Real Estate Management, LLC, Walter Palma – Plaza Realty & Management Corporation & Lynn Jackson, CMCA, AMS – The Property Group of Connecticut, Inc.



(above) Regina Hamel, Margo Sullivan, Kevin Hellriegel, CMCA, AMS, Terry Sullivan, Ron Conti – Heritage Village Master Association



**Dena Liberman,
CMCA, RES**

Un-Common Common Areas

By Dena Liberman, CMCA, RES

I was recently showing a prospective client condominiums for sale in the Milford area. The first one we went to see had a front lawn that needed tending to. In addition to the lawn, there was a 5 foot weed growing directly up in front of the condominium sign and bushes on either side that were overgrown. The driveway into the complex had asphalt crumbling and curbing was cracked. The carpeting in the entry foyer was stained and torn up at the edges. The client stopped me right there and said: "I don't think I would like to see this unit."

I knew that the unit inside the building itself had been renovated and was in pristine condition. However, just by first impression of the maintenance of the landscaping, driveway and the front hallway, the client was turned off to the complex.

This same client was shown a different unit by me in a complex that was beautifully landscaped. As we entered the main hallway, I could see she was excited by look of the nicely painted area with clean carpeting and decorative items in the lobby.

Although the unit itself was dated and needed work, she felt that the condition of the property overall was a compelling factor for her. She submitted an offer and purchased the condo unit.

I asked her what motivated her in placing her offer on this particular unit and she responded "I can fix up the unit, but sometimes it's difficult to fix how the property is managed and maintained."

Curb appeal is something that imprints an immediate opinion on the buyer's mind and is usually what they recall from their initial visit to a complex. Many times, there is one thing that they remember from a property, and it is not what you wish they would take away from your showing of an individual unit.

There are many ways a property can be helped if the association board is on the ball and has been setting proper monies aside for repair and beautification projects.

Many impending projects seem overwhelming by the scale of the work, depending on the size of the property. But, if done in stages, they can be broken down to a commitment to continuance and perseverance on the part of the association's board.

Some comparisons are:

- A property with a stagnant pond - versus - an aerator fountain in a pond.



"Many impending projects seem overwhelming by the scale of the work, depending on the size of the property."

- Driveways with cracks and broken curbs compared to asphalted drives with painted curbing.
- Dead tree branches and brown dirt garden beds — versus — trimmed hedges and mulched garden beds with fresh plantings.
- Peeling and chipped painted hallways in a color from the eighties — versus — painted neutral color choice in current palate.

All of these leave a lasting impression on any buyer's mind.

Property managers and boards need to ascertain what jobs need to be done on a property as they come up, and sometimes these get usurped by emergencies. Proactive maintenance ensures that care and attention is given to all matters of importance on the property, while at the same time, consideration of future projects is not being ignored. So many times our punch list will be driven by the budget, emergencies, and constant complaints. Look ahead to what "might" occur if an issue that looks small at this time is allowed to grow or is ignored. If there are times of quiet and a little extra in the budget, instead of taking a proactive approach on beautifying the property, we wait for the next problem or issue to arise and mediate it accordingly.

So many properties need so little to make a positive first impression. It may just be that the property signage needs a fresh coat of paint.

Mulching and edge trimming speak volumes. Many times a reminder is necessary to the landscaper to spend a little extra time on the front hedges, trees and overgrowth on the edges of the property. They too get used to just doing the minimal amount of cutting, and may need that reminder to go the extra length. Leaves blown and not removed, dead branches and dead plants that have not survived the season need to be removed on a regular basis.

Major jobs such as siding, roofing, curbing and asphalt need to have a plan in place for future consideration of property beautification and remediation. The need for a large reserve account and possibly a proposal for a loan may be needed, but it is never too early to start preliminary discussions with the Board and also to be aware of the consensus of the unit owners as well. It is by paying attention to the constant comments you see coming in to your office or remarks and reviews on your website, or even directly from the residents themselves that you can gauge the need for additional work needed on a property by their importance to the residents. Always have an agenda for current projects and for future ones. Be certain that the board is mindful that there is always an improvement that is on the horizon, and make a financial plan to ensure proper maintenance is a priority.

Curb appeal is important, and your property's appeal doesn't end at the curb! ■

Dena Liberman, CMCA,RES works at On the Mark Management, LLC and is a registered Licensed Real Estate Agent, specializing in sales/rentals of homes, condominiums and coops. She is also an experienced Property Manager, and a Project Manager. Dena also has 16 years of professional Interior Design experience. Dena is a member of the CAI-CT Summer Sizzler committee.



NEWS FLASH!

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Manager's Column...

Being Practical, Part XLIII

Agendas - A Primer

By Reg Babcock and Rich Wechter, CMCA

In this column we tackle various topics of interest to association Boards of Directors with the intent of imparting practical advice. This issue's column addresses agendas, the most fundamental aspect of any meeting, but especially Board and Owner meetings of condominium and homeowner associations. After touching on the advantages (and disadvantages!) of agendas, we list and discuss some of the most important considerations pertaining to the development of agendas and their use.

A. Advantages

In some ways, the advantages of creating and adhering to good agendas is a given; we all assume that an agenda invariably is a good thing. And usually it is. Agendas convey important information to meeting participants, including goals, attendee responsibilities and topics of discussion. When distributed ahead of the meeting, the agenda lets participants plan ahead in preparing questions or ideas on topics. This helps ensure that meeting discussions focus on the most important issues and ideas. Agendas also help meeting leaders maintain structure and keep the meeting from running long, which is valuable for volunteer Board members, owners and management representatives alike. More detail on these comments below.

B. Disadvantages

To be balanced in our treatment of agendas, there are potential disadvantages. The major potential disadvantage of a structured agenda is that it can prevent conversations from evolving on a topic that participants deem important. If a meeting goes off the agenda topic — even if what's being discussed is of great value — leaders may cut the conversation short so the meeting goes back on topic. A strict agenda may also minimize opportunities to initiate on-the-spot, spontaneous topics during the meeting. This hampers the free flow of ideas that often result in favorable results. While these disadvantages may be heavily outweighed by the advantages, they are nonetheless important to remember. Again, these considerations receive additional attention in the sections that follow.

C. Who?

Typically, the Community Association Manager is the one charged with preparation of the agenda for Board and Owner meetings, and usually he or she does so without direct input from the President. It is the Manager who is expected to have the greatest familiarity with the community's business and priorities, and therefore in the best position to put the agenda together. Given the fact that Board members are volunteers, it is usually assumed that crafting an agenda is a part of the work for which the Manager is paid. In other cases, the Manager and the President collaborate, with the President first drafting the agenda



“The most compelling approach to preparing agendas takes into account the importance of topics to be included and structures the agenda accordingly.”

and sharing it with the Manager or vice versa. In rare instances, the President prepares the agenda and asks the Manager to distribute it. There is no right or wrong way to assign this responsibility, but the Manager who handles agendas for several properties certainly has a good instinct for agenda content and structure. Of equal or greater importance, the Manager should have a realistic concept of just how much business a given Board can effectively tackle in a two-hour meeting.

D. Priorities

The most compelling approach to preparing agendas takes into account the importance of topics to be included and structures the agenda accordingly. The order of business is critical. While this fact often means making the most important topic first, it is not necessarily the case. It may be appropriate to have the first items be those which can be disposed of quickly, i.e., housekeeping matters. Or perhaps an item of business, although not the most important, necessarily must be resolved before a weightier matter can be taken up. For example, it

may make the most sense to determine an amount that will be spent on tree work before taking up discussion of a new landscaping contract.

Another important aspect of ordering the agenda is determining where to insert Owner Comments. This item is required by statute at every meeting. Many Associations include Owner Comments as the first item of business, largely out of courtesy for the owners who make the time and effort to attend the meeting, but sometimes out of custom. We have seen meetings where Owner Comments were deferred to a later part of the agenda. This approach can be effective if the business the Board plans to conduct at the meeting actually addresses matters that the owners would raise, thereby avoiding duplicative conversations. At the very least, deferring Owner Comments affords the Board more time, earlier in the meeting, to complete its business.

Last, the agenda structure specifies when (and if) there is to be an executive session. The statute spells out the very limited topics that can be addressed in an executive session, and Boards are reminded to stay well within the prescribed bounds. But there is considerable latitude in where in the agenda the executive session occurs. Leaving it to the end, as often is done, leaves the least time for a full discussion. As no voting or action is to be taken in the actual executive session, and in order to vote, the regular, public session needs to resume, it is usually an empty room and a pro forma exercise when resumption of the public session is the last business item. Several Boards do hold their executive sessions first, allowing full time for discussion, without the awkwardness of asking owners in attendance to leave, and voting on any executive session items at a logical point of the regular session.

E. Changes

Regardless of whatever forethought and planning went into the written agenda, the President should not hesitate to take items out of order if there is a good reason to do so. There probably are many such reasons, but as one example, the President may be aware that another director or even owner with interest in a particular item of business must leave the meeting early. In order to include that individual, the President could simply "call an audible" and take an item earlier or later.

F. Expectations

In so many facets of community management we discuss "expectations" and setting of expectations. It is a much broader topic than we

[Continues on page 24.]

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AGENDAS...from page 23.

intend to tackle here, but with one relatively modest act, a Board can signal how much time is to be allocated to any given topic. We suggest that every agenda should set forth for every item of business the time that is to be allocated to that topic. Of course the President can allow more time if the discussion is more complicated or productive than first thought, but by establishing time limits up front, all of the meeting participants are likelier to be more succinct and less repetitive with their comments.

Much more can be said concerning agendas, their importance and value, but perhaps we have at least caused readers to re-think their current approach. ■

The authors work for Westford Real Estate Management, LLC. Reg Babcock is Chief Operating Officer & General Counsel and Rich Wechter, CMCA is Senior Vice President.



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Timothy Wentzell, P.E.

TECHNICAL EXPLANATIONS

This column appears in each edition and is intended to touch on technical topics of general interest to common interest associations. Topics will be of a general nature, but I will also accept and respond to questions from readers. On occasion, it will be guest authored when topics can best be addressed by experts in other fields.

EVOLUTION AND TRANSITION ISSUES

By Timothy Wentzell, P.E.

One of the themes of this month's magazine is transition issues. We have been doing transition studies for condominium associations for many years and I find it very interesting how associations have evolved over the years due to economic cycles. During peak times, associations tended to be constructed in a reasonable period of time and then transitioned. And in these cases, the transition review depending obviously on what type of issues they had, could be relatively straight forward. What we have been seeing more recently is associations transitioning after many years of construction, often with as many as two or three different developers creating different parts of the association. Frequently, we learn that a community association was started many years ago by the initial developer. This developer's business failed and likely the association was taken over by a bank, then at some point sold to another developer who created, likely similar units but not necessarily in the same style and type, and then used totally separate contractors and even architects or designers for his period of development. In a few cases we have seen this cycle repeated more than once, and an association can have many distinct ages, types, and quality of construction. The developers often had very different ideas of what they thought would be saleable, and this can certainly compound the preparation of a transition review as in many ways it can be similar to conducting multiple reviews as each phase can have its own special attributes. Sometimes within the different phases of development the only commonality may be the finishing of roads, sidewalks, and some of those items which have been written about frequently before in this column are often not completed in a timely basis and

"The concern here is that a paving system is designed to consist of both of these layers done in concert with each other in order to create a strong enough pavement..."



problems occur where the remediation work needed can be significant before final completion.

Another subset of these problems, which we seem to be seeing more regularly, is where associations have transitioned to unit owner control while the developer still has rights in place for completion but sales are either non-existent or lagging, and many infrastructure items such as paving, sidewalks, or recreational facilities are not complete. A great uncertainty exists with regard to whether the developer is going to be willing or able to complete these items. To explain this further let me discuss one issue in more depth; that being final pavement.

When association developments are delayed because of lack of sales, what is referred to as the binder, or first layer of pavement, is often installed in these complexes. Then, in some cases many years later, the top coat, often referred to as the wearing course, is then installed. The concern here is that a paving system is designed to consist of both of these layers done in concert with each other in order to create a strong enough pavement to carry the loads that would be expected on this pavement. When many years elapse on only half of this paving, the paving then deteriorates often cracking or what's referred to as alligatoring, or other defects which often may include more than the paving. These may include catch basin caps, curbs and other features of the paving system thus rendering them unsuitable for installing the second layer on top of a now defective base. This can result in a situation where what is referred to as reflective cracking becomes the common phenomenon. This is familiar to many of us

[Continues on page 35.]



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Eric Churchill

The Science of Energy Savings

How a holistic approach to your building envelope helps save the environment while saving homeowners money

By Eric Churchill

Making environmentally responsible choices has become an important social value for condominium communities. But when it comes to energy savings, large-scale projects can be challenging. Especially if the time and cost to “go green” does not deliver a meaningful financial return to homeowners.

The good news is that when it’s time to replace your aging building envelope, your community will have a rare opportunity to help save the environment while saving homeowners money.

The primary reason for complete building envelope replacement is to weatherize and protect your property from the elements. But a key secondary benefit, which is often overlooked, is a significant improvement in energy efficiency which translates directly into energy cost savings. These savings are in addition to savings realized from reduced exterior maintenance and repair costs.

In fact, our data shows that a new energy-efficient building envelope reduces homeowner heating and cooling costs by an average of 30%.

Energy Loss and Your Building Envelope

The “building envelope system” is a construction term that describes how building components (such as siding, roofs, windows, doors, and trim) are tied together using barrier materials to protect your home from the elements.

An effective building envelope also helps maintain interior temperatures by regulating the transfer of air flow, heat, and moisture.

A building envelope is said to be “loose” if air, heat, and moisture can pass easily through the envelope. A “tight” building envelope means there are few such leaks, which are typically caused by failed flashing details, inadequate insulation and building components at the end of their life cycles.

In other words, your property’s energy efficiency is tied directly to the health of your building envelope system. And as that system ages and the degrades, the amount of energy required to keep your home comfortable increases, along with your energy bills.

Relatively easy energy saving measures may help. But these options are often limited by homeowner initiative and energy assessment programs from utility companies. New thermostats and LED lights are not likely to produce a meaningful return on your investment if energy dollars continue to leak through your walls and roof.

This piecemeal approach to energy savings may be convenient, but it is not as effective as a building envelope replacement, which allows you to correct two underlying causes for energy loss — air transfer and heat transfer.



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Gone with the Wind

The greatest energy savings a new building envelope system delivers is from reducing the rate of unwanted air that flows in and out of your home.

Improper air flow transports unwanted heat, cold and moisture through your building envelope. At the very least, your heating and cooling systems have to work harder to maintain temperature. Moist air can also condense inside wall cavities, leading to rot and mold.

Air, like water, seeks the path of least resistance. If there is a way to infiltrate your building envelope, air will find it. No crack is too small. Drafty windows and doors are obvious examples. Not as obvious are the air leaks hiding under aging wall systems, and siding and roof transitions.

A new building envelope reduces air transfer by sealing seams and transitions with an integrated system of underlayments and flashing details.

The immediate energy savings are particularly pronounced in building-boom era condominiums from the 1980s and ‘90s, when the priority was quick production — not an energy efficient building envelope.

Negative Pressure, Positive Results

The path to energy efficiency starts with a diagnostic audit to measure the rate of air transfer in your existing building envelope.

Air transfer, which is responsible for the majority of energy loss, is measured by performing a negative pressure test using a device com-

What about Windows?



Want the best possible energy savings for your community? Replace older or failing windows as part of your building envelope replacement — along with skylights and doors.

The obvious reason to upgrade — that advanced technology has made today's windows, skylights and doors far more energy efficient — is not the only reason to upgrade.

Installing new windows, skylights and doors during a building envelope replacement is also the best way to assure the highest quality weatherproofing and cost-savings.

Building envelope replacement requires removal of existing siding and roofing material, making it possible to identify and repair any water damage caused by failed flashing details. New windows, skylights, and doors can then be tied into walls and roofing systems using waterproof barriers, house wrap, flashing materials and sealants.

The result is a fully-integrated building envelope system that is optimized for weatherization, energy-efficiency, and longevity.

Bonus: Replacing windows, skylights and doors at the same time is also more cost-efficient because the crews are already onsite. Replacing these same components after the new building envelope is completed can easily cost 30% more.

monly known as a “blower door.”

The blower door is installed in an exterior doorway and works on the principal that air always flows from high pressure to low pressure. In this case, the device pulls air from interior living space, and calculates the rate at which air “leaks” back inside through the building envelope. The air transfer rate is measured in cubic feet per minute, or CFM.

The higher the CFM number, the more energy you are using. We know this because there is a direct one to one correlation between air transfer rate and the amount of energy it takes to heat or cool your home, which is measured in British Thermal Units, or BTUs. So the higher the CFMs, the more BTUs you are consuming, and the higher your energy costs. Likewise, any reduction in air transfer rate is directly proportional to a reduction in the consumption of BTUs required to maintain the interior temperature.

To verify energy efficiency and cost savings, a second blower door test is performed after building envelope replacement is complete. Determining cost savings is a simple calculation. Take these numbers from a recent building envelope replacement project, for example:

A blower door test conducted on an existing building envelope produced an air transfer rate of 2,000 CFM, which is considered high and indicative of a loose building envelope. The follow-up blower door test, performed after building envelope replacement, produced an air transfer rate of 1,333 — a reduction of more than 30% — which translates directly to a 30% cost savings in BTU consumption.

Seal Interior Air Leaks

Homeowners can further boost building envelope energy performance by hiring a qualified contractor to seal air leaks inside their home. Air sealing is more involved than just weather-stripping doors and caulking around windows.

Most utility companies offer free energy conservation audits and incentives for multi-residential properties, which typically include air sealing services.

Efforts should target a variety of critical areas, including: recessed lights, electric outlets, basement crawl spaces, attic access doors, and ductwork.

Important: Air sealing is essential for an energy efficient building. But if your building is too tight, it won't breathe at all. That's why air sealing must be combined with proper ventilation to assure a consistent supply of fresh air and to exhaust moisture, carbon monoxide and other indoor pollutants.

Planning for air handling complexity is part of a holistic approach to building envelope replacement. An experienced HVAC contractor can help you custom-design a system for your specific needs.

Put a Halt to Heat Transfer

Comprehensive building envelope replacement also allows you to reduce energy lost through heat transfer.

Heat transfers from warmer to cooler states in three ways:

- Conduction — heat transfer between materials in direct contact
- Convection — heat transfer through circulation of a liquid or gas
- Radiation — the transfer of heat from a warm object to a cooler object across an open space

Heat transfer is largely controlled by using insulation and air barriers to create a thermal boundary. In loose building envelopes, these materials are inadequate, installed improperly, or missing from wall and roofing systems.

Insulation resists heat transfer by trapping pockets of air. This resistance to heat flow is measured in R-value. The greater the R-value, the longer it takes for heat to move through the insulation. But if the insulation becomes compressed, or wet, its ability to prevent heat transfer degrades.

“Your property's energy efficiency is tied directly to the health of your building envelope system.”

[Continues on page 30.]



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SCIENCE OF ENERGY SAVINGS...from page 29.

Important: Insulation installed without a proper air barrier is virtually useless. One without the other is just as ineffective as going outside on a cold windy day wearing either a loose-knit sweater or a wind-breaker. To stay warm, you need both components to work together: the sweater to trap warm air and the wind-breaker to prevent air transfer.

Heat transfer problem areas are identified using thermographic imaging. This diagnostic device displays temperature variations as colors. Extreme temperature differentials indicate trouble spots that require further investigation. Typically, the cause turns out to be heat loss or moisture, as materials that are wet tend to be cooler.

Start with a Holistic Approach

Planning a building envelope replacement project provides a rare opportunity to do right by the environment and create significant energy cost-savings for homeowners.

Start by taking a holistic approach. Use diagnostic audits to gather facts about your building envelope's energy efficiency. Then hire an experienced contractor or engineer to create a solution that will benefit the environment and your homeowners for decades to come. ■

Eric Churchill is the president of Scherneck Property Services in Waltham, Mass.

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Steve Margolis,
CMCA, AMS

Choosing A Style of Leadership

Leadership Styles Emerge As Leaders Perceive What They Must Do

By Steve Margolis, CMCA, AMS

As home owners are chosen to become directors, their style of behavior is destined to emerge when confronted with the trials and tribulations of myriad association issues. Some members will be more vocal, some will be controlling, some will sit back and not say anything, and others may continue to change their mind and go along with whoever sounds more convincing or spoke last. Others may go along just to get along but never really be satisfied with the decision that gets made, even though they agreed.

Relative to that, this article will deal with styles of leadership. Based on the situation, the leader chose a particular style. Here are some real life examples.

Within hours after the events of 9/11, Mayor of New York City, Rudy Giuliani, took control. He led, directed others, made decisions and made himself visible by getting out and walking the streets. He attended funerals, visited people in hospitals and stood beside first responders. He felt the weight of the crisis and how people depended on him to help get the greatest city in the world through this crisis. His actions were so vivid in his mind, he modeled that behavior by describing it in a book about leadership – he described his behaviors, what he did, what he said, how he acted and why.

Michael Jordan, probably one of the greatest and most versatile athletes of all time, certainly in the NBA, used his mastery of the sport and method of urging his players to give the best they could, and more. He was a fierce competitor and led by example. He expected the same effort from his team mates. No slacking! While battling the flu, Jordan played in the NBA finals and his last shot won the game for his team.

Martin Luther King was a compassionate, courageous and insightful leader. He had millions of followers. He walked the walk and talked the talk. Through his speeches and his actions, he defied injustices, encouraged others to do the same and demonstrate in a manner of peaceful resistance. His willingness to confront discrimination, bigotry and intolerance cost him his life.

Steve Jobs of Apple was a hard driving, hard-nosed, self motivated, business leader prone to taking no prisoners. He berated others in front of their peers. He humiliated others in his quest to be the best of the best. It was his chosen style most, if not all of the time. Was his style successful? I guess it's a matter of perspective.

A Brief Background on Theory

The most common theory, at first, was people were born with leadership traits, or they weren't. Leaders could not be trained to lead, it was innate. The top executives in many organizations came in the "John Wayne" style – a physical presence, a firm handshake, direct



eye contact, and no nonsense in character, use volume and action to get your point across.

Think about the leadership style of the great industrialists in the early to mid 1900s – oil, banking, automotive, manufacturing, to mention a few. There was an abundance of leaders using an authoritarian style (not appropriate in most association board meetings which require a more collaborative approach).

The research on behavior-oriented leadership began in earnest in the 1960s. Many studies were done, interviews performed and theories expanded. The main theme that began to emerge was that the most successful leaders were adaptable to the situation. They demonstrated flexibility in their style. A popular theory of leadership was developed by Blanchard and Hersey in the 60s. The leader would adjust his or her approach to the ability and readiness of those he or she would influence. Hence, the phrase, "different strokes for different folks."

The theory made common sense. A leader would choose his or her behavior based on the level of knowledge or accomplishment of the person or persons he or she would lead. Given that any situation could change, the leader would need to adapt to each situation. This put tremendous pressure on the leader because he or she would be required to "know when to hold'em, and know when to fold'em."

All members of association boards are considered leaders by virtue of their position in the community. They are afforded a certain amount of control and influence in the function of the community. How they make decisions, work together, deal with crisis, varies greatly. It is this combination of personalities and styles, as described above, which contribute to the decision-making process and its results.

So now, with that in mind, place yourself in the midst of any typi-

cal board meeting among the variety of boards you manage. Here's a sample of mine.

Example A. Each month I meet with a board consisting of educated, even-minded, mature adults who can agree to disagree. The president guides the group in and out of potential mine fields. Member personalities couldn't be more different. She is ever vigilant of time and moves the meeting along.

Example B. Each month I meet with a board whose president places mines in the field where there were no mines and leads his fellow board members right to them. He controls the meeting with volume, sarcasm and an occasional insult for good measure. At board meetings, with owners in attendance, he speaks in a stern, direct manner. Owners, with questions, get the same measured, stern look and response.

Example C. Each month I meet with a board whose president will tell you what he thinks. If challenged, he will raise his voice an octave, his facial expressions become animated and for more emphasis, shifts his eyes from side to side and wave his arms. He wants to know what others think; he wants their buy in.

Example D. Each month, the board president brings the meeting to order, goes through the agenda, allows for conversation, uses feedback to gather thoughts and requests a decision by a vote of Board

members. Reports are given, questions are asked, various thoughts emerge, the president restates what he has heard, and calls for a vote. We move on.

The underlying element in the success or failure of any leader is their ability to use sound judgment and demonstrate versatility – if anything, recognize, one size does not fit all.

Picture in your mind's eye, who were some of the best leaders you ever knew. He or she probably had at least several attributes that made them successful. One of the key elements of successful leaders is being an effective listener. Another is possessing the courage to hear things you don't agree with, even if it has to do with your style of leadership.

The take away for managers:

1. No one leadership style is best nor does it fit all situations.
2. The overuse of any style is a weakness.
3. Theory has it that one's behavioral style further crystallizes when one is under pressure.
4. Managers could and should use their communication skills to assist the leader who is using their style ineffectively. That could mean:
 - A. Breaking in and summarizing what you think has the leader is trying to say.
 - B. Moving the meeting along if points have been repeated and the length of the meeting seems to be getting out of hand.

[Continues on page 35.]



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Support Biological Lake and Pond Management with “Probiotics”

By Erin Stewart

There are many sustainable options for the management of lakes and ponds, so it can be difficult to determine which direction to turn when a problem occurs. This is especially true for waterbodies used for recreational activity, irrigation, drinking water storage or any location where pesticides or other traditional management methods may be less desirable or restricted. However, all aquatic resources can benefit from proactive applications of natural and biological products. Beneficial bacteria-based products can be used as a pesticide alternative, or used in conjunction with other products and methods to enhance the efficiency of the treatment.

Bacteria may sound like a bad word in some situations, but these organisms are the foundation of most biological processes within an aquatic resource. Think of them as probiotics or yogurt for your lake, pond or reservoir — they are responsible for breaking down and processing organic material in a process called biological augmentation.

When properly introduced, biological augmentation can help limit the impact of nutrients like nitrogen and phosphorous, which tend to enter waterbodies through runoff containing fertilizers, animal waste and other organic materials. Without proper management, these materials may accumulate as sludge at the bottom of your waterbody, causing noxious odors, promoting nuisance algae and weed growth and expediting the waterbody’s rate of aging. Over time, costly dredging will be required to restore the health and overall volume of the aquatic resource. When beneficial bacteria are in place, they convert nutrients to forms that cannot fuel nuisance plant growth, promote efficient decomposition and prevent the accumulation of organic materials. This, in turn, can help diversify the biological community structure by facilitating the development of “good” algae, diatoms, zooplankton and healthy fish.

Regular applications of these biologicals can be incredibly favorable and help keep beneficial bacteria concentrations and activity high throughout the year. Depending on the particular water quality or vegetation issues within your lake, pond or reservoir, a lake and pond management professional may recommend different forms of probiotic bacteria, including liquid, pellet or powdered applications.

Liquid bacteria blends are considered high-performance due to their ability to rapidly neutralize excessive nutrients that are located within the water column. Liquid blends can help to quickly enhance water clarity and quality. Pellet or granular beneficial bacteria applications contain bacteria that naturally settle to the bottom of a lake or pond to reduce organic materials that cause bottom sludge. In moderate or warm climates, the resulting reduction in accumulated sediment can be significant.

Beneficial bacteria are an excellent solution for the reduction of excessive nutrient rich organic matter that cause bottom sludge and nuisance vegetation, but they don’t have to be utilized independently. When applied by a licensed professional, some biological products can



Courtesy CAI-CT

“When beneficial bacteria are in place, they convert nutrients to forms that cannot fuel nuisance plant growth...”



also be used in conjunction with herbicides to aid in the decomposition process of submerged and emergent vegetation.

A professional will determine the rate and frequency of beneficial bacteria and/or herbicide applications by conducting water chemistry tests or considering the targeted issue. However, the best way to achieve your overall lake or pond goals is to ensure the proper products are being utilized. There are many selections available on the market, so it is very important to choose a quality option with field data and science supporting the claims. Always rely on your lake and pond management company for beneficial bacteria recommendations, as well as guidance on strategies to improve aeration, beneficial buffers, water quality and native wildlife populations. Your water will thank you. ■

Erin Stewart is an experienced Aquatic Biologist with SOLitude Lake Management, an environmental firm providing a full array of superior lake, pond, wetland and fisheries management services and solutions. She can be reached through the website www.solitudelakemanagement.com.

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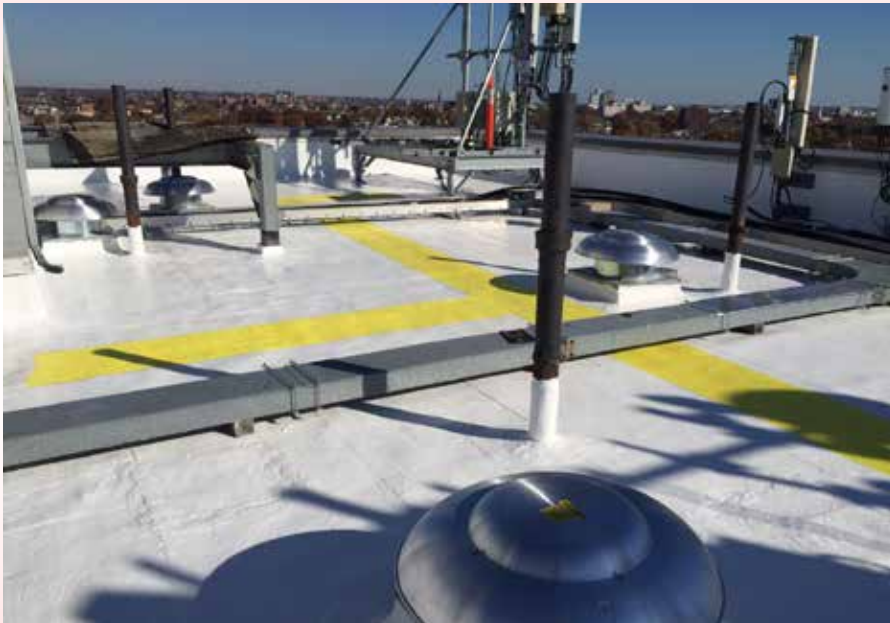


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