

Partner Agency Reports

Oak Park Residence Corporation
21 South Boulevard
Oak Park, IL 60302

David Pope, President & CEO
708.386.6061

Beth Swaggerty, Vice President of Human Resources and Administration
708.386.6061

Type of Report:

☒ 2019 Semi-Annual Report (Year-End)

☒ 2020 Semi-Annual Report

☐ 2020 Semi-Annual Report (Year-End)

☐ Other: _____

Memo

To: Jeff Prior
From: Beth Swaggerty, CAM, CMCA, Small Condo Management Program Coordinator
Date: 02/14/2020
Re: Small Condo Management Program – 2019 Annual Report - Scope of Work, Program Goals & Measures

PROGRAM SERVICES

Throughout 2019 Program Coordinator, Beth Swaggerty worked closely with five (5) associations to address specific concerns and issues and to reinforce the more formal monthly training offered by the program. A summary of the objectives, activities, and outcomes for each of the five (5) associations can be found starting on page 2 of this report.

In addition to working closely with the five participating associations, Ms. Swaggerty conducted ten (10) formal training seminars. These training seminars covered the key elements of Condominium Association Management and often included guest speakers from relevant industries. (See attached 2019 Seminar Schedule) Members from the five (5) primary program associations as well as various board members or owners from the twenty associations listed below attended these seminars.

Ms. Swaggerty also met in person, by phone, or by email with representatives of the following twenty (20) Oak Park condominium associations regarding issues pertaining to restatement of declaration and bylaws, proper procedure for amending governing documents, hierarchy of state statutes and governing documents, fiduciary responsibilities of the board, change of registered agent, annual reports, open meetings, board vs. owners' meetings, effective record keeping and owners' rights to review association records, rental restrictions, rules and regulations, foreclosure process, disclosure of association information to potential buyers/banks, risk mitigation, reserve accounts, capital improvements, notice requirements, conducting meetings and rules of order.

- ✓ Maple Tree Condominium (6 Units)
- ✓ Park Avenue Manor Condominium Association (10 Units)
- ✓ Maple Arbor Condominium Association (6 Units)
- ✓ Euclid Point Condominium Association (12 Units)
- ✓ 720 North Austin (11Units)
- ✓ 417 South Kenilworth Condominium Association (6 Units)
- ✓ 152 North Scoville Condominium Association (4 Units)
- ✓ Taylor-Lake Condominium Association (10 Units)
- ✓ Wisconsin Manor Condominium Association (6 Units)
- ✓ 2 LeMoyne Parkway Condominium Association (10 Units)
- ✓ 511 North Humphrey Condominium Association (6 Units)

- ✓ 608 South Highland Condominium Association (4 Units)
- ✓ 257 Washington Condominium Association (10 Units)
- ✓ 409-411 Washington Blvd. Condominium Association (6 Units)
- ✓ 106 South Ridgeland Condominium Association (22+Units)
- ✓ 833 N. Harlem Condominium Association (9 Units)
- ✓ 820 N. Austin Condominium Association (11 Units)
- ✓ 514 Wenonah Condominium Association (4 Units)
- ✓ Barclay Court Condominium Association (11 Units)
- ✓ 439-441 S. Taylor Condominium Association (10 Units)

Lastly, Ms. Swaggerty has attended eight (8) association board meetings to provide guidance in proper parliamentary procedure, clarification of pending issues, and/or to introduce the program to potential participants.

PRIMARY PARTICIPATING ASSOCIATIONS

The 100-104 South Austin Condominium Association (9 Units)

Program Start Date: July 2016

Program End Date: Anticipated December 31, 2019

Association Objectives

Status

- | | |
|---|------------|
| 1. Meet regularly with SCMP coordinator to reinforce formal training and establish and/or review action plans | Achieved |
| 2. Establish proper financial recordkeeping and provide membership with regular financial reports | Achieved |
| 3. Achieve and maintain a positive cash flow in operating account | Achieved |
| 4. Establish separate operating and reserve accounts | Achieved |
| 5. Prepare and adopt annual operating budget(s) | Achieved |
| 6. Effective Board Transition | Achieved |
| 7. Address deferred maintenance at building | In-process |
| 8. Initiate collections against delinquent owner(s) | In-process |

Association Outcomes

1. Met regularly with new board members to reinforce formal training and review action plans. One board member completed all of the formal training seminars/ others attended formal training sporadically.
2. The association now has three (3) full years of detailed financial records. Monthly assessments are being raised annually to effectively meet their on-going expenses. Membership is regularly provided with financial reports.
3. Proper record keeping has resulted in a positive cash flow in their operating accounts
4. A separate reserve account has been established and is being contributed to on a monthly basis in accordance with annual budget.
5. Association is working from its duly adopted annual operating budget.
6. New board has been elected.

7. The board established three (3) special assessments to cover the cost of correcting building violations as cited by the Village
8. Collection action has been initiated
9. At the end of 2019, the Association voted to contract outside management services and has done so.

Comments: This association transitioned to a new board for 2020. Hopefully the new board will benefit from the training and experience the previous board received as participants in the program. One new board member is currently attending the program's monthly formal training seminars.

The George Condominium Association -713 Washington Blvd (6 Units)

Program Start Date: January 2018

Program End Date: Anticipated July 31, 2019

Association Objectives

Status

- | | |
|---|------------|
| 1. Regularly meet with SCMP coordinator to reinforce formal training and establish and/or review action plans | Achieved |
| 2. Board members to attend each of the 12 formal training seminars | In-process |
| 3. Correction of four (4) years of miscalculated and misallocated monthly assessments | Achieved |
| 4. Establish best practices and written protocol for bidding capital projects | Achieved |
| 5. Review of Board Officers' roles and fiduciary responsibilities | Achieved |
| 6. Review of current building insurance policy and risk mitigation | Achieved |
| 7. Review bylaws for needed updates/revisions | In-process |

Association Outcomes

1. Association is now managed through the board rather than by consensus of all owners. Decisions are made and action taken in compliance with the Illinois Condominium Property Act, therefore their liability and risk in their actions has been mitigated.
2. The appropriate allocation of assessments has been implemented and repayment has been made to the owner who was over paying.
3. Property insurance policy now provides appropriate coverage and mitigates risk
4. Reserve study has been contracted

Comments: This association no longer requires one-on-one guidance and SCMP personnel will work with them strictly on an as-needed basis.

1103-1107 S Austin Condominium Association (11 Units)

Program Start Date: September 2017

Program End Date: Anticipated December 2019

Association Objectives

Status

- | | |
|---|----------|
| 1. Regularly meet with SCMP coordinator to reinforce formal training and establish and/or review action plans | On-going |
|---|----------|

- | | |
|---|----------|
| 2. Attend each of the twelve (12) formal training seminars | On-going |
| 3. Clarification of governing documents regarding: | |
| A. Rentals | Achieved |
| B. Annual Elections | Achieved |
| C. Rules & Regulations – violations & hearings | Achieved |
| D. Process for amending bylaws | Achieved |
| 4. To understand board officers' duties and roles | On-going |
| 5. To conduct meetings with proper notice, parliamentary procedure, and maintain proper minutes | On-going |

Association Outcomes

1. Board secretary is participating in monthly training seminars
2. Formal Rules & Regulations have been drafted and approved
3. Board meetings are being regularly conducted and minutes are being kept
4. Association has amended bylaws to limit number of rentals

Comments: In formally limiting the number of rentals within the building, the property gains value and is more attractive to potential buyers and their lenders. The board secretary has reported the board is meeting regularly and taking action on a number of issues.

Ridgeland Station Townhome Owners Association

Program Start Date: September 2018

Program End Date: Anticipated October 2019

Association Objectives

- | | <u>Status</u> |
|---|---------------|
| 1. Regularly meet with SCMP coordinator to reinforce formal training and establish and/or review action plans | On-going |
| 2. Understand board officers' duties and roles | Achieved |
| 3. To learn proper notice, parliamentary procedure, voting, and taking minutes for meetings | Achieved |
| 4. Hold regular meetings | On-going |

Association Outcomes

1. Training on board duties and roles is completed
2. Board Treasurer has attended ten (10) of the monthly formal training seminars.
3. Treasurer is still struggling to engage other board members and owners in meeting regularly, making it difficult to take action on several pending issues.

Comments: Effective self-management and compliance with governing documents is difficult for this association because of lack of participation and engagement from owners and board members. Essentially, the current board treasurer is managing all aspects of the property.

Brickwood East Condominium Association (4 Units)

Program Start Date: January 2019

Program End Date: Anticipated January 2020

Association Objectives

Status

- | | |
|---|----------|
| 1. Regularly meet with SCMP coordinator to reinforce formal training and establish and/or review action plans | On-going |
| 2. Attend each of the twelve (12) formal training seminars | On-going |
| 3. Clarification of governing documents regarding: | |
| A. Limited Common Elements/Capital Improvements | Achieved |
| B. Insurance Coverage and Risk Mitigation | Achieved |
| C. Waiver of Subrogation | Achieved |
| 4. To conduct meetings with proper notice, parliamentary procedure, and recorded and approved minutes | On-going |
| 5. Conflict Resolution | On-going |

Association Outcomes

1. Entire board has regularly met with SCMP coordinator on various issues and has taken formal action as needed.
2. Board president is participating in monthly training seminars
3. Board has better understanding of governing documents
4. Board is conducting regular meetings with proper notice, following parliamentary procedure, and minutes are taken and approved as official records of the association.
5. Communication among board members is improving

Comments: The board president has indicated that the information and training she has received and related back to the rest of the board has strengthened communication within the board and it has become easier to make decisions and take action in the management of the association.

PROGRAM ENHANCEMENTS

Formal training has become a key component of the program, consisting of twelve (12) power-point training seminars on specific aspects of association management (see exhibit A). Written and designed by Program Coordinator, Beth Swaggerty; these presentations are updated on a regular basis to reflect current legislation and best practices. Many of the seminars include industry professionals as guest presenters. In addition, Ms. Swaggerty utilizes and distributes "Best Practice Guides" on specific areas pertaining to condominium association management. These "Best Practice Guides" are written by various professionals in the field of condominium management and are published by CAI – Community Association Institute. These enhancements have allowed the program to grow from a program of reactive crisis management to one emphasizing proactive training, support, and action.

Ms. Swaggerty also continues to expand and update the program's pages on OPRC's website to include current articles, written by association professionals, on relevant issues and changing legislation. There are also links to relevant documents, events, and organizations - such as the Illinois Condominium Property Act, the Association of Condominiums Townhomes and Homeowners' Association (ACTHA) and the Community Association Institute (CAI). Visit www.oakparkrc.com/small-condo.

Ms. Swaggerty continues to maintain her CMCA (Certified Manager of Community Association) and CAM (Certified Association Manager) licenses.

EXHIBIT A
SMALL CONDOMINIUM PROGRAM – FORMAL TRAINING SESSIONS 2019

SESSION 1

ASSOCIATIONS AS NON-PROFIT CORPORATIONS

Oak Park Residence Corporation
21 South Blvd., Oak Park, IL 60302
Thursday, January 17, 2019
7:00 pm – 8:30 pm

SESSION 2

GOVERNANCE - UNDERSTANDING YOUR GOVERNING DOCUMENTS, RELATED STATUTES, LEGISLATION, AND COMPLIANCE

Oak Park Residence Corporation
21 South Blvd., Oak Park, IL 60302
Thursday, February 21, 2019
7:00 pm – 8:30 pm

SESSION 3

ROLES AND FIDUCIARY RESPONSIBILITIES OF THE BOARD

Oak Park Residence Corporation
21 South Blvd., Oak Park, IL 60302
Thursday, March 21, 2019
7:00 pm – 8:30 pm

SESSION 4

FINANCIAL RECORD KEEPING

Oak Park Residence Corporation
21 South Blvd., Oak Park, IL 60302
Thursday, April 18, 2019
7:00 pm – 8:30 pm

SESSION 5

MEETINGS

Oak Park Residence Corporation
21 South Blvd., Oak Park, IL 60302
Thursday, May 16, 2019
7:00 pm – 8:30 pm

SESSION 6

RISK MITIGATION & INSURANCE

GUEST SPEAKER – Adam Doe, State Farm Insurance, Oak Park. IL 60302

Oak Park Residence Corporation

21 South Blvd., Oak Park, IL 60302

Thursday, June 20, 2019

7:00 pm – 8:30 pm

SESSION 7

ASSESSMENTS & COLLECTIONS

Oak Park Residence Corporation

21 South Blvd., Oak Park, IL 60302

Thursday, July 18, 2019

7:00 pm - 8:30 pm

SESSION 8

RESERVES & RESERVE STUDIES

Oak Park Residence Corporation

21 South Blvd., Oak Park, IL 60302

Thursday, August 15, 2019

7:00 pm - 8:30 pm

SESSION 9

CAPITAL IMPROVEMENTS

GUEST SPEAKER – Derek Darter, Capital Improvement Specialist, Oak Park Residence, Oak Park

Oak Park Residence Corporation

21 South Blvd., Oak Park, IL 60302

Thursday, September 19, 2019

7:00 pm - 8:30 pm

SESSION 10

ANNUAL BUDGET

Oak Park Residence Corporation

21 South Blvd., Oak Park, IL 60302

Thursday, October 17, 2019

7:00 pm - 8:30 pm



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SMALL CONDOMINIUM PROGRAM PARTICIPANT SURVEY – 2019

Please complete and fax or email to:

(708) 386-9362 or bswaggerty@oakparkrc.com

PARTICIPANT INFORMATION	TO BE COMPLETED BY PARTICIPANT(S)
Association Name	100-104 South Austin Condominium Association
Association Address	100-104 South Austin Blvd., Oak Park, IL 60302
Number of Units	10 Units
Board Contact	Candice Martin, Treasurer
Board Contact Phone	708-595-0643
Board Contact Email	candice.m422@gmail.com
Year of Participation	2017-2019
How did you hear about the program? Fellow Board Member Edmond Blevins	Check all that apply: OPRC Website _____ VOP Website _____√_____ VOP Condominium Networking Meeting _____ Referred By: _____ Other: _____
Please specify the training and/or information your association received as participants in the Small Condominium Program.	Check all that apply: GOVERNING DOCUMENTS - Illinois Condominium Act _____√_____ - Declaration _____√_____ - Bylaws _____√_____ - Rules & Regulations _____√_____

Training/Information Cont.

NON-PROFIT CORPORATION

- Articles of Incorporation ☒
- Annual Report ☒
- Tax Return ☒

ROLE OF BOARD

- Fiduciary Responsibilities ☒
- Board Members ☒
- Election of Officers ☒

MEETINGS

- Robert's Rules of Order ☐
- Open Board Meetings ☒
- Executive Session ☒
- Owners' Meetings ☒
- Annual Meeting ☒
- Board & Officer Elections ☒
- Voting ☐

FINANCIAL

- Annual Budget ☒
- Monthly Assessments ☒
- Special Assessments ☒
- Reserves ☒
- Late Fees ☒
- Bill Payment/Reoccurring Costs ☐
- Record Keeping ☒

BUILDING REPAIRS & CAPITAL IMPROVEMENTS

- Reserve Study ☒
- Identifying Licensed Contractors
and Appropriate Vendors ☒
- Determining Scope of Work ☒

Training/Information Cont.	<ul style="list-style-type: none"> - Project Oversight _____ <p>CONFLICT MANAGEMENT</p> <ul style="list-style-type: none"> - Collections/Payment Schedules <u> √ </u> - Rental/Leasing Policies _____ - Foreclosures & Short Sales _____ - Legal Action - Practices & Procedures <u> √ </u> 								
Did any of your board members also participate in the VOP/ACTHA Learn & Lead Series? Our past President, Edmond Blevins did but I'm not sure which ones.	<table border="0" style="width: 100%;"> <tr> <td>Governance _____</td> <td>Financial Aspects _____</td> </tr> <tr> <td>Administration _____</td> <td>Meetings/Elections _____</td> </tr> <tr> <td>Physical Aspects _____</td> <td>Insurance/Risk Mgmt. _____</td> </tr> <tr> <td>Ask an Attorney _____</td> <td></td> </tr> </table>	Governance _____	Financial Aspects _____	Administration _____	Meetings/Elections _____	Physical Aspects _____	Insurance/Risk Mgmt. _____	Ask an Attorney _____	
Governance _____	Financial Aspects _____								
Administration _____	Meetings/Elections _____								
Physical Aspects _____	Insurance/Risk Mgmt. _____								
Ask an Attorney _____									
<p>VALUE QUESTIONS</p>	<p>Please answer the following questions in your own words.</p>								
Has your participation in this program helped the association develop a better overall understanding of Self-Management?	<p>Yes, definitely. Still struggling with getting new board members to join in as others resign, but we're managing the building and the association's finances much better now.</p>								
Did the board find this program helpful in understanding its fiduciary responsibilities and establishing due diligence?	<p>Yes – At the time we started participating we had serious financial problems and not much was getting done at the building. We were behind on paying our regular bills, owed the Village thousands of dollars for services, and had been cited by the Village for several building violations. We also didn't have any reserves.</p> <p>Ms. Swaggerty helped us develop a plan to take care of all of those issues. She guided us in setting up payment plans with vendors and the Village, raising our monthly assessments and budgeting so we could meet our financial obligations, creating special assessments to make the repairs needed to correct our building violations, and establishing a reserve account. Currently we're meeting all of our monthly expenses and have reserves in place that are growing.</p> <p>We have a much better understanding of our fiduciary responsibilities and due diligence because of the guidance and training we have received.</p>								
What specific training/information did you find most helpful?	<ol style="list-style-type: none"> 1. Proper financial record keeping and management. 2. Budgeting 3. Being proactive instead of reactive with decisions and action. 								

What specific training/information did you find least helpful?	All of the training was helpful, but maybe the training about insurance because it's pretty boring stuff and we rely on our insurance agent to guide us.				
Overall, on a scale of 1 -5, how would you rate this program.	1	2	3	4	5
How can we improve this program? Please be specific.	<p>Maybe include regular access to legal expertise and services at a reduced cost? In small associations, a single owner not paying their assessments can be a big financial setback and pursuing legal services for collections can be costly.</p> <p>Ms. Swaggerty provides excellent training on the collection process, but actual access to affordable legal services would be very helpful.</p>				



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residence corporation**

SMALL CONDOMINIUM PROGRAM PARTICIPANT SURVEY – 2019

Please complete and fax or email to:

(708) 386-9362 or bswaggerty@oakparkrc.com

PARTICIPANT INFORMATION	TO BE COMPLETED BY PARTICIPANT(S)
Association Name	The 1103-1107 Washington Blvd Condo Association
Association Address	1107 Washington Oak Park, IL 60302
Number of Units	11-units
Board Contact	Secretary- Diane Floyd
Board Contact Phone	773-524-9017
Board Contact Email	Dianefloyd3@yahoo.com
Year of Participation	2017
How did you hear about the program?	<p>Check all that apply:</p> <p>OPRC Website _____</p> <p>VOP Website _____</p> <p>VOP Condominium Networking Meeting _____</p> <p>Referred By: Cedrick Melton</p> <p>Other: VOP-Neighbor Relations</p>
Please specify the training and/or information your association received as participants in the Small Condominium Program.	<p>Check all that apply:</p> <p>GOVERNING DOCUMENTS</p> <ul style="list-style-type: none">- Illinois Condominium Act _____ x _____- Declaration _____ x _____- Bylaws _____ x _____- Rules & Regulations _____ x _____

Training/Information Cont.**NON-PROFIT CORPORATION**

- Articles of Incorporation x
- Annual Report x
- Tax Return x

ROLE OF BOARD

- Fiduciary Responsibilities x
- Board Members x
- Election of Officers x

MEETINGS

- Robert's Rules of Order x
- Open Board Meetings x
- Executive Session x
- Owners' Meetings x
- Annual Meeting x
- Board & Officer Elections x
- Voting x

FINANCIAL

- Annual Budget x
- Monthly Assessments x
- Special Assessments x
- Reserves x
- Late Fees x
- Bill Payment/Reoccurring Costs x
- Record Keeping x

BUILDING REPAIRS & CAPITAL IMPROVEMENTS

- Reserve Study x
- Identifying Licensed Contractors
and Appropriate Vendors x
- Determining Scope of Work x
- Project Oversight x

Training/Information Cont.	CONFLICT MANAGEMENT <ul style="list-style-type: none"> - Collections/Payment Schedules ___x___ - Rental/Leasing Policies ___x___ - Foreclosures & Short Sales ___x___ - Legal Action - Practices & Procedures _____ 								
Did any of your board members also participate in the VOP/ACTHA Learn & Lead Series?	<table border="0" style="width: 100%;"> <tr> <td>Governance _____</td><td>Financial Aspects _____</td></tr> <tr> <td>Administration _____</td><td>Meetings/Elections _____</td></tr> <tr> <td>Physical Aspects _____</td><td>Insurance/Risk Mgmt. _____</td></tr> <tr> <td>Ask an Attorney _____</td><td>"no participation in any" _____</td></tr> </table>	Governance _____	Financial Aspects _____	Administration _____	Meetings/Elections _____	Physical Aspects _____	Insurance/Risk Mgmt. _____	Ask an Attorney _____	"no participation in any" _____
Governance _____	Financial Aspects _____								
Administration _____	Meetings/Elections _____								
Physical Aspects _____	Insurance/Risk Mgmt. _____								
Ask an Attorney _____	"no participation in any" _____								
VALUE QUESTIONS	Please answer the following questions in your own words.								
Has your participation in this program helped the association develop a better overall understanding of Self-Management?	While the Small Condominium Program imparted valuable information and understanding of self-management, due to opposing influence from the association's management company and reluctance of board members, unfortunately I was unable to generate interest to participate.								
Did the board find this program helpful in understanding its fiduciary responsibilities and establishing due diligence?	Training material on Fiduciary responsibility of the board was provided and shared with fellow board officers, an extended leave of absence by the boards president (with unfilled vacancy) created a void which was not addressed during my tenure as board secretary.								
What specific training/information did you find most helpful?	Without exception, all of the handouts provided and reviewed in class were most valuable. Training was delivered with clarity and patience. Additional learning opportunity via one-on-one sessions with Beth Swaggerty helped address problems specific to one's association. The literature published by CAI press and provided free of charge was a bonus and can serve the Association as reference material.								
What specific training/information did you find least helpful?	For one without prior condominium management experience, all of the information, discussions, printed material, exchanges among other attendees was valuable. Therefore, I cannot cite anything that was least helpful.								
Overall, on a scale of 1 -5, how would you rate this program.	<div style="display: flex; justify-content: space-around; align-items: center;"> 1 2 3 4 5 </div>								
How can we improve this program? Please be specific.	Given, people generally pursue their interests but reluctance from fellow board officers may be a topic for more discussion on ways to engender participation.								

Addendum to: Small Condominium Program Participant Survey: 1103-1107 Washington

From: Condominium participant Diane Floyd

To Whom This May Concern-

Having completed the survey as a former condo association board officer, I felt it necessary to provide additional thoughts as follows:

Even though other board officers within the association I was a part did not engage the training, I chose to represent the association by attending the training sessions and learned much which enabled me to share governance matters and procedures that would not have otherwise been known. Bringing the new knowledge to the board's attention did in fact impact several decisions the board had to make on the issue of subrogation and board elections.

I would be remiss not to underscore appreciation for the service provided by trainer and facilitator Beth Swaggerty; her expertise in association management and manner of delivery deserves acknowledgment.

Beth not only provided a wealth of information herself, but also included subject matter experts to expound upon particular matters i.e. Insurance. Lastly, I would add that she deserves her own individual rating which I am glad to assess as an exceptional "5".

Thank you for the program.



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residence corporation**

SMALL CONDOMINIUM PROGRAM PARTICIPANT SURVEY – 2019

Please complete and fax or email to:

(708) 386-9362 or bswaggerty@oakparkrc.com

PARTICIPANT INFORMATION	TO BE COMPLETED BY PARTICIPANT(S)
Association Name	Ridgeland Station Townhome Owners Association
Association Address	255 South Blvd APT 23, Oak Park, IL 60302
Number of Units	22
Board Contact	Doug Weismantle
Board Contact Phone	708-256-5048
Board Contact Email	treasurer@rsthoa.org
Year of Participation	2019
How did you hear about the program?	Check all that apply: OPRC Website _____ VOP Website _____ VOP Condominium Networking Meeting _____ Referred By: _____ Other: <u>Condo law meeting at Village Hall</u>
Please specify the training and/or information your association received as participants in the Small Condominium Program.	Check all that apply: GOVERNING DOCUMENTS - Illinois Condominium Act <u>x</u> _____ - Declaration <u>x</u> _____ - Bylaws <u>x</u> _____ - Rules & Regulations <u>x</u> _____

Training/Information Cont.

NON-PROFIT CORPORATION

- Articles of Incorporation X
- Annual Report X
- Tax Return X

ROLE OF BOARD

- Fiduciary Responsibilities X
- Board Members X
- Election of Officers X

MEETINGS

- Robert's Rules of Order
- Open Board Meetings X
- Executive Session X
- Owners' Meetings X
- Annual Meeting X
- Board & Officer Elections X
- Voting X

FINANCIAL

- Annual Budget X
- Monthly Assessments X
- Special Assessments X
- Reserves X
- Late Fees X
- Bill Payment/Reoccurring Costs X
- Record Keeping X

BUILDING REPAIRS & CAPITAL IMPROVEMENTS

- Reserve Study X
- Identifying Licensed Contractors
and Appropriate Vendors X
- Determining Scope of Work X
- Project Oversight X

Training/Information Cont.	CONFLICT MANAGEMENT <ul style="list-style-type: none"> - Collections/Payment Schedules x _____ - Rental/Leasing Policies x _____ - Foreclosures & Short Sales x _____ - Legal Action - Practices & Procedures x _____
Did any of your board members also participate in the VOP/ACTHA Learn & Lead Series?	Governance _____ Financial Aspects _____ Administration _____ Meetings/Elections _____ Physical Aspects _____ Insurance/Risk Mgmt. _____ Ask an Attorney _____
VALUE QUESTIONS	Please answer the following questions in your own words.
Has your participation in this program helped the association develop a better overall understanding of Self-Management?	Yes.
Did the board find this program helpful in understanding its fiduciary responsibilities and establishing due diligence?	Yes.
What specific training/information did you find most helpful?	So many tasks were previously not executed by my board, and now we are, such as: Filing annual tax returns, preparing and voting on proper budgets, understanding the governing documents, Etc.
What specific training/information did you find least helpful?	Items regarding the duties and responsibilities of uninvolved officers are not helpful, but that is simply due to their lack of interest in managing the property.
Overall, on a scale of 1 -5, how would you rate this program.	1 2 3 4 5
How can we improve this program? Please be specific.	Perhaps put the covered material online somewhere in case it's not possible to attend a meeting, but otherwise the wide array of information taught in this program is great.



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SMALL CONDOMINIUM PROGRAM PARTICIPANT SURVEY – 2019

Please complete and fax or email to:

(708) 386-9362 or bswaggerty@oakparkrc.com

PARTICIPANT INFORMATION	TO BE COMPLETED BY PARTICIPANT(S)
Association Name	409/411 Washington BLVD
Association Address	409/411 Washington blvd
Number of Units	6
Board Contact	409 411 Washington@gmail.com
Board Contact Phone	
Board Contact Email	
Year of Participation	1
How did you hear about the program?	<p>Check all that apply:</p> <p>OPRC Website <input checked="" type="checkbox"/></p> <p>VOP Website <input type="checkbox"/></p> <p>VOP Condominium Networking Meeting <input type="checkbox"/></p> <p>Referred By: _____</p> <p>Other: _____</p>
Please specify the training and/or information your association received as participants in the Small Condominium Program.	<p>Check all that apply:</p> <p>GOVERNING DOCUMENTS</p> <p>- Illinois Condominium Act <input checked="" type="checkbox"/></p> <p>- Declaration <input checked="" type="checkbox"/></p> <p>- Bylaws <input checked="" type="checkbox"/></p> <p>- Rules & Regulations <input checked="" type="checkbox"/></p>
Training/Information Cont.	<p>NON-PROFIT CORPORATION</p> <p>- Articles of Incorporation <input checked="" type="checkbox"/></p> <p>- Annual Report <input type="checkbox"/></p>

Training/Information Cont.	- Tax Return	✓
	ROLE OF BOARD	
	- Fiduciary Responsibilities	✓
	- Board Members	✓
	- Election of Officers	
	MEETINGS	
	- Robert's Rules of Order	✓
	- Open Board Meetings	✓
	- Executive Session	✓
	- Owners' Meetings	✓
	- Annual Meeting	✓
	- Board & Officer Elections	✓
	- Voting	
	FINANCIAL	
	- Annual Budget	✓
	- Monthly Assessments	✓
	- Special Assessments	✓
	- Reserves	✓
	- Late Fees	✓
	- Bill Payment/Reoccurring Costs	✓
	- Record Keeping	✓
	BUILDING REPAIRS & CAPITAL IMPROVEMENTS	
	- Reserve Study	✓
	- Identifying Licensed Contractors and Appropriate Vendors	✓
	- Determining Scope of Work	✓
	- Project Oversight	✓
	CONFLICT MANAGEMENT	
	- Collections/Payment Schedules	✓
	- Rental/Leasing Policies	✓
	- Foreclosures & Short Sales	✓

	- Legal Action - Practices & Procedures ✓				
Did any of your board members also participate in the VOP/ACTHA Learn & Lead Series?	Governance ✓	Financial Aspects ✓			
	Administration ✓	Meetings/Elections ✓			
	Physical Aspects ✓	Insurance/Risk Mgmt. ✓			
	Ask an Attorney ✓				
VALUE QUESTIONS	Please answer the following questions in your own words.				
Has your participation in this program helped the association develop a better overall understanding of Self-Management?	YES!				
Did the board find this program helpful in understanding its fiduciary responsibilities and establishing due diligence?	absolutely - The organization has improved greatly.				
What specific training/information did you find most helpful?	Understanding the laws and regulations to make the condo more efficient and in good standing				
What specific training/information did you find least helpful?	none, it's all been helpful.				
Overall, on a scale of 1 -5, how would you rate this program.	1	2	3	4	5
How can we improve this program? Please be specific.	Continue the program.				

Memo

To: Tammie Grossman
From: Beth Swaggerty
Date: 8/11/2020
Re: Small Condo Management Program – YTD Activities Status Report

Below is a summary of YTD Small Condo Management Program activities and services for 2020.

In the first quarter of 2020 Ms. Swaggerty met regularly both in person (prior to the COVID-19 Shelter in Place Order) and by phone and ZOOM virtual meetings with the following five (5) associations to identify issues requiring immediate attention; establish and implement an action plan to resolve those issues; and provide training in best practices and processes for continued self-management. Various board members from each of these associations also participated in the program's more formal monthly training sessions.

- 100-104 South Austin Condominium Association (9 units)
- The George (711-713 Washington Blvd. 6 Units)
- Wenonah Condo Association (514 Wenonah – 6 Units)
- 409-411 Washington Ave Condominiums (6 Units)
- Brickwood East Condominium Association (431-433 S. East Ave – 4 Units)

The 100-104 South Austin Condominium Association

This association completed its program participation in May of 2020. Prior to participating in the program this Association was at risk of de-conversion. Through its participation in the program this Association is now functioning and in compliance with all local and state statutes. They are currently meeting their financial obligations and are regularly contributing to capital reserve account. As of March 1, 2020 they have employed a professional management company to manage the day to day operations of the property.

The George Condominium Association

This association has received one-on-one assistance and guidance in budgeting, capital improvements and amending their governing documents. Various board members also attend the program's monthly training seminars.

Wenonah Condominium Association

This association has received one-on-one assistance and guidance in understanding various provisions of their governing documents pertaining to the board's authority and obligations in the management of the property, risk management, and the development of rules and regulations. The Board Secretary regularly attends the program's monthly training seminars.

409-411 Washington Condominium Association

This association has received one-on-one assistance and guidance in developing bid specifications, building reserves, conducting meetings and various issues of compliance with the Illinois Condominium Property Act. The Board Treasurer regularly attends the program's monthly training seminars.

Brickwood East Condominium Association

This association has received one-on-one assistance and guidance in maintaining association records and meeting minutes, use and approval of board resolutions, association insurance and various misc. issues pertaining to compliance with governing documents and the Illinois Condominium Act. The Board Treasurer regularly attends the program's monthly training seminars.

Additionally, Ms. Swaggerty spoke, corresponded, and/or met independently with unit owners and/or board members of the following associations on various issues including but not limited to; restatement of declaration and bylaws, proper procedure for recording amendments to governing documents, hierarchy of state statutes and governing documents, fiduciary responsibilities of the board, registered agent and submitting annual reports, open meetings, board vs. owners' meetings, effective record keeping and owners' rights to review association records, rental restrictions, rules and regulations, foreclosure process, disclosure of association information to potential buyers/banks, risk mitigation, reserve accounts, capital improvements, notice requirements, conducting meetings and rules of order. Several board members and/or owners of these associations attended a number of the program's formal training sessions.

- Park Avenue Manor Condominium Association (10 units)
- Maple Arbor Condominium Association (6 units)
- Euclid Point Condominium Association (12 units)
- 820 North Austin (11units)
- 426 Lombard Condominium Association (6 units)
- 211 N. Grove Condominium Association (10 Units)
- 921 Condo Association
- 1103 -07 Washington Blvd. Condo Association
- Villa Miranda Condominium Association (122-124 S. East Ave – 7 units)
- Taylor-Lake Condominium Association (10 units)

Impact of COVID-19 Program

Despite the COVID-19 pandemic, program activity has remained steady during this period with a with an uptick in phone and email inquiries pertaining to COVID-19 related issues such as the association boards responsibilities and authority in enforcing social distancing within the community, and requests for information on accommodating delinquent owners who are experience pandemic-related financial hardship.

Formal training has become a key component of the program, consisting of twelve (12) power-point training sessions on specific aspects of association management. (See Exhibit A) Written and designed by Program Coordinator, Beth Swaggerty; training content is updated on a regular basis to reflect current legislation and best practices. Many of the sessions include industry professionals as guest presenters.

In addition, guided by our efforts to support appropriate social distancing, the SCMP has shifted its monthly training seminars from on-site participation to virtual participation. This has required additional hours in adapting training materials.

Lastly, Ms. Swaggerty has completed her continuing education requirements and has renewed her CMCA (Certified Manager of Community Associations) Certification. She has also maintained her CAM (Certified Association Manager) license.