

To: Phoebe Neseth, Esq. Senior Director, Community Associations Institute, Government and Public Affairs and CCAL Liaison
cc: David Wilson, Esq. SC-LAC President
Sean O'Conner, Esq. SC-LAC Vice-Chair
Coleman Daniel, SC-LAC Secretary

From: Charlie Lovelace, SC-LAC Treasurer

Re: Response to*Updated* Board Member Education Public Policy

Phoebe,

Thank you for the opportunity to respond to the draft proposal of the board member education policy. I have serious reservations about this policy moving from its current voluntary status to a mandatory one for all owner associations. I do acknowledge that at this point the new proposed policy uses the word "should" rather than "must" and I hope it stays that way unless other modifications can be made. It is my hope that this letter will help convince the policy drafters that there is an entire world of small HOAs/POAs that will suffer serious negative consequences should mandatory board member requirements be adopted.

I am responding as a board member of the SC-LAC, but also as a homeowner who lives in a small HOA (74 lots with 70 homes) and also as a board member of Mountain Lakes Community Association (MLCA), a CAI member all-volunteer nonprofit created in 2009 to assist owner associations in our area. Except for one, MLCA member owner associations are small. MLCA is composed of 63 local owner associations containing a total of 5,071 lots, or about 80 per association. Our largest member has 1300 lots but less than half as many houses. Our next largest has 254 lots, many still undeveloped. Our smallest two members have only eight and eleven lots.

MLCA thinks this move could severely hurt small owner associations. The recommended changes are certainly excellent ideas, especially for a perfect world where all lot owners are anxious to join in and help with the many functions required to run an owners' association. The real world is different, especially the small association world. Most of our members have difficulty getting people to serve on their boards and then stay on until

their terms expire. We think this additional imposition of time and responsibility will further reduce the pool of owners willing to help. Upon receiving your request for input, MLCA polled its members on the topic. I am going to let them speak for themselves by putting their unedited responses below.

Charlie Lovelace
SC-LAC Treasurer
Homeowner in Emerald Pointe subdivision
MLCA Board Member

Below are the comments submitted from MLCA members:

White Oak Cliffs HOA, with 120 lots, votes emphatically "NO". We would likely be forced to dissolve our HOA should this proposal be accepted. Perhaps this is someone's strategy to generate more business for property management companies.
- John Voss, President

Thank you very much for making us aware of this information. As Treasurer of a very small HOA (10 houses), we struggle to get anyone to help. I can understand the logic behind the larger HOAs but we are so small and only 4 of the 10 homeowners are actually here full time. It can even be a struggle to get people to respond to an email to vote on something. If this were to pass and become mandatory, I would imagine no one would want to serve, myself included. It is my hope that this is stopped dead in its tracks.
- Charlotte Cox, Treasurer, **Lakestone Cottages Home Owners' Association**

*As President of the Lakestone Cottages Home Owner's Association I am writing to advise **against** a mandatory CAI Board Leader Certificate program. We are a 10-home subdivision and have 40% of our homeowners on the board and another 30% involved in other HOA activities. Half of our HOA makes Lakestone Cottages their primary residence and the other half uses this residence as a get-away. The recommended certification process will add needless costs and time commitments, and reduce the desire for an engaged and active board and neighborhood. Any educational opportunities should be optional and at the discretion of each HOA and not mandated by any government or association.*
- Dave Nolan, President, **Lakestone Cottages Home Owners' Association**

If an HOA wants to make some level of education a requirement for their board membership, the owners within that HOA / community certainly have that latitude and may very well find it helpful. It's quite a different proposition for a governing entity to mandate such training and to demonstrate economic naivete by requiring the HOA or a state to pay for it - who do they think funds the HOA and state? Owners and citizens, that's who, and forcing resource allocation within an HOA or state or any entity has one of three outcomes - the dues / taxes earmarked for other needs are redirected, dues / taxes are increased to fund the mandated expenditure, or both. The result is that mandated expenditures force owners, taxpayers, or both to pay more. I'm well past buying the idea that "someone else will pay for it." That's just uninformed economics.

Couple that with a blanket mandate that board members allocate more personal time to the management of an HOA by participating in mandatory training and the result is predictable: fewer interested candidates for what are already difficult-to-fill roles in local HOAs. The proposed time commitment may "only" be two hours, initially, but we've all seen how such mandates grow beyond the bounds of original intent. It's simply the nature of such mandates and it's best not to take the first step down such a slippery slope. To be clear, I support voluntary board member education and it's one of the reasons I find MLCA to be such a valuable asset to our community. However, unless CAI is prepared to commit to budgeting for mandatory education from its own funds and provide a stipend to participating board members to compensate for their time associated with such education, without increasing member dues or decreasing other services, I'd suggest they continue to encourage voluntary education and direct member communities to qualified board education programs, but avoid unfunded mandates.
- Jay Savan, Vice President - **Harbor Oaks Owners Assn.**

*My name is Ellis Johnson. I am currently the president of the **Teakwood HOA** near Anderson SC on Lake Hartwell. We have just under 100 members, occupying approximately 85 homes. Establishing qualifications and training for board members can sound beneficial to a point, but making these mandatory is likely to create an atmosphere where fewer members are willing to participate in the administration of their association. Furthermore, regulation of any entity generally leads to more regulation, with fewer members willing to serve the association, and those that do may be the ones more given to "control" of the subdivision. These individuals are probably less interested in an association aimed at diversity of architecture, ambience, membership, and lifestyle. Homeowner's associations are like government where rights and responsibilities are granted by the members to a group (board), but are answerable to those members. When this group (board) goes beyond those granted rights and responsibilities, it is the onus of the members to take back or modify those rights and responsibilities and reform the group. Interference by another government entity is neither needed, nor would it be appreciated. Advice is always welcomed, but imposition of outside regulation must be infrequent and minimal.*

***Hidden Harbor HOA** has eleven lots with six homes. I am very proud of the small group of members that volunteer their time to make our community great. I support offering optional education and training that has no cost to the HOA or individual Board members. However, I strongly disagree with making it mandatory to take these education and training classes, or charging for these classes, as that would make it very challenging to get HOA members to agree to take on Board responsibilities with this added burden.*
- David McCurdy, Chairman of the Board/President

***South Port Village POA** has 42 lots, 29 homes. We are constantly battling the need for more than the core group of 5-10 people who do most of the work! I have been president and treasurer for 9 years now and just re-upped for 3 more years. Also, most of our residents are getting up in age - most well over 70 - and new younger owners are too busy with life, family and jobs to be interested in serving. On top of the looming implications of CTA, requiring our board members to do mandatory training is unacceptable. I pride our little board in doing a great job at budgeting, keeping records, enforcing our covenants, enhancing our property, and keeping a*

no-drama environment that people want to live in! Please advise CAI that this will break the back of small POAs like us!

-Jan Barnett

***East Shores HOA** has 51 lots. Not only do we have difficulty getting people to serve on the board, we have trouble getting people to serve on the nominating committee. I'm in my third three-year term as treasurer at East Shores Owners Association, because I think that's a job that needs someone who somewhat knows what he's doing. Things can get messed up pretty quickly when you have well-intentioned but financially clueless people in that slot. So, I would support efforts to strongly encourage education and to provide inexpensive opportunities for it, but not absolutely mandate it for small organizations.*

- Mark Torres

*I have lived in the neighborhood serviced by the **Emerald Pointe Owners Association (EPOA)** for almost 24 years, serving one year as board secretary and two years as president, and serving on the Nominating Committee for many years. Mandatory board member education is probably a good idea for large associations, but for EPOA where we have only 74 lots, it would be one more severe barrier to getting new board members. During my first year as EPOA's president, we asked 15 people to run for the board before being able to get a very reluctant yes from number 16. This is not unusual for us.*

-Charlie Lovelace

*I have lived in the **Emerald Pointe** subdivision (74 lots with 70 homes) for over ten years and have served on the Board of Directors since 2015 in various roles including President and currently as Vice President. I am a huge fan of CAI and very much encourage others to register for their very informative webinars. I strongly agree with training and educating potential board members and it should be encouraged; however, if this were to become mandatory, associations such as ours would have an even more difficult time recruiting potential board members. It is near impossible now.*

- George Kendall

*I also strongly agree that education/training should be offered (at no/minimal cost) and encouraged, but should not be made mandatory, legislatively or by any other means. We in **Shelter Cove POA** are small – only 25 lots, 17 homes (currently). We have had a small core group who have served since the POA's inception in 2005. No one has resigned, and only two “retired” when they moved out of the subdivision, so things have been stable and we did not have any difficulty getting volunteers to replace the departing directors. The remainder of our members seem content to continue with the status quo.*

- Dave Wittnebert, President

***Waterside Crossing HOA** has 254 homes but we still have trouble getting people to serve. A good treasurer is hard to come by. Will get harder if this passes.*

- Al Brightwell, Former multi-year President

***Waterside Crossing** has 254 lots and approximately 200 completed homes. I would be a strong advocate for optional supplemental training for board members. However, it seems to be getting more and more difficult to find people willing to serve. I fear that mandatory training would*

make it worse. I would push hard for board members to get optional training when available but, please, no mandatory requirements.

- Jerry Anderson, President

*I'm currently president of the **Keowee Harbours Community Services Organization, a.k.a. the Keowee Harbours HOA**. We are a community of just over 100 property owners. Most of our property owners are full-time residents. I've been on the board for two years and president for one. Even though we have a very active and engaged community, it's nearly impossible to find someone to run for the board when a current member has fulfilled a three-year term. We will have two openings this upcoming year, and as of this writing, we have no volunteers. We also have many people who have steadfastly said "no" to joining the board. HOA boards of our size for a community our size have historically been volunteer organizations. The vast majority of these organizations are well managed and serve to benefit their communities. I support the CAI's offering of voluntary training, but I am steadfastly opposed to any sort of mandatory training. It is simply an addition of one more burden for board members that are already providing hours of voluntary service. I believe the CAI should put its efforts towards enforcement of existing laws and regulations, and not towards creating new regulations that will be expensive to create and enforce. Let's face it; we do not require any education for our elected officials, or CAI members. It makes no sense to force mandatory education on volunteer members of an HOA board. If the CAI continues to put forth this type of recommendation to our legislators, I suggest we work to change the membership of CAI, and stop supporting them. There is simply no need for further regulations when we are unable to enforce the regulations we already have on the books.*

- Karl Steiner

*I'm currently the VP for the **Keowee Harbors HOA** and I am opposed to the suggestion of requiring training.*

- Sam Phifer

*I am currently serving as the Treasurer for the **Keowee Harbours Community Service Association (KHCSA)** Board of Directors. Our community consists of 109 properties, roughly 75% of which are developed. I strongly oppose the mandatory requirement for formal HOA/POA Board Member training. Our small community regularly struggles to fill the 4 volunteer board positions (President, Vice President, Treasurer, and Secretary), each of whom serves a 3-year term. Any additional burdens placed on volunteers will only exacerbate this situation. I fully support efforts to provide free/inexpensive training and agree that volunteers should be encouraged to take advantage of available training; however, this should not be a mandatory requirement. Local HOA/POA Boards should be left to self-manage training expectations/requirements for their organization.*

- Scott Kumler

*I serve as the Secretary for the **Keowee Harbours Community Service Association** Board of Directors. I have also served on other HOAs in very large communities with over 500+ homes. I am very much opposed to any mandatory training in regards to HOA Board service. In both large and small HOAs, it is a challenge to get people to serve. Adding mandatory training will add another barrier to attracting people to community service. I am not sure what problem*

we are trying to solve, but the risk of reduced support for Board positions is very real. Having unfilled Board positions is a much higher risk than having Board members that are not fully trained. In addition, most communities use a management company. This helps reduce the risk of a Board making mistakes due to lack of knowledge. Please do not move forward with any type of required training.

- Monty Rigsby

*I am currently serving as the Ex officio member of the **Keowee Harbours Community Service Association** Board of Directors. I am in my fourth year as a Board member, serving as Treasurer and President previously. I am very opposed to any requirement for mandatory education for Board membership. HOA Board membership is a volunteer responsibility requiring many hours devoted to community responsibilities that severely limit HOA members' willingness to serve. Additional mandatory education will only make recruiting Board members more difficult. I personally don't feel the words mandatory and volunteer are definitive of the same position. I do support offering educational opportunities to Board members for their individual option to participate, but not requiring mandatory participation.*

- James F. Bell, Jr.

*My name is Mark Evans I am President of **Waters Edge HOA**, a community with 100 lots. The idea of mandatory education classes, while a good idea, would make a severe hardship for smaller associations. We have lost board members midterm because of the time commitment and have a small number of people willing to put in the effort to do the job that needs to be done and are willing to put up with the grief provided by those who would never think of serving. The time commitment is considerable for an unpaid position. Adding mandatory education would drop our pool of property owners willing to serve to zero.*

- Mark W. Evans, Sr. CML

*I am President of **The Landing at Barefoot Cove**, 826 Barefoot Cove Dr, West Union SC. We have 14 lots. It's hard enough to get volunteers for board positions and this would take more time and resources. I vote to not adopt this position. Thank you for this information.*

- Wesley Edwards

***Windswept HOA** has 8 lots (with 6 owners), 5 with houses; 2 of the houses are 2nd homes. I assumed the Presidents role back in 2014 only because I was asked! Since then, I have had to assume the other board roles as the work required never gets done. It's even rare to get more than 2 people to attend any HOA meetings so we have had to resort to essentially email meetings. This requirement would push us to consider a different form of organization as I already can't get people to help.*

- Bill Griffith

*As President of the **Pointe Harbor 1 & 2 HOA**, a community of 80 lots, I have found it difficult to find volunteers for subcommittee tasks as well as anyone remotely interested in serving on the Board. Mandatory training, while an excellent idea, will only work if it can be done on an individualized basis in the comfort of the volunteer's homes. Forcing them to attend training, however convenient, will ultimately reduce the willing pool of volunteers to those few who have their own agendas at heart. I do believe on-line training could work, should be available, and*

should be open to not only Board members but ALL members of the community. A Board is an extension of the community and all community members should be trained and have available updated training..... Maybe, just maybe, this could also encourage everyone to read their covenants.

- Jim O'Connor

*I am a Board member and VP of the **Edgewater Property Owners Association**. I strongly support Board education opportunities along the lines of MLCA's letter and would expect to use them if offered free. However, like others, I do not support making the education mandatory as it will make it even harder to convince owners to serve on the Board.*

- Joe W Cochran, PE

For the reasons described in your email, I object to the proposed law requiring formal training for POA Board Members. We have 86 lots.

*- Robert Brosnahan, President **Edgewater POA***

I am not in favor of mandatory training.

*- Renie Mezzanotte, Secretary **Edgewater POA***

*I am President and Treasurer for **The Crossing's Homeowners Association**. Our community consists of sixty homes. Most of the homeowners are senior citizens who do not wish to serve as HOA board members. This makes it difficult for our community to find residents interested and willing to serve on the board. Our HOA is a member of Mountain Lakes Community Association (MLCA) along with 62 other HOAs in our area. MLCA has been instrumental in providing excellent voluntary training opportunities for their members. These training sessions are often conducted by attorneys or accountants who specialize in HOA matters. In my opinion, placing mandatory training requirements on HOA board members will only serve to diminish the already low number of residents who would be willing to serve on our HOA board. I feel that the current optional training for HOA board members should remain the standard. I urge you to vote against changing the training requirement to any form of mandatory training.*

- Marty Lee, President and Treasurer

*I agree that education/training should be offered at no/minimal cost and encouraged, but not mandatory. We live in **Wynward Pointe**, a small POA of 117 lots. Volunteers to serve on our Board will be very difficult to find if mandatory training is a requirement.*

- Doug Hettinger, President

I believe that for small HOAs, under 50 lots, they should be encouraged to use Voluntary Training. I am not aware of what voluntary training is available, if any. I believe for HOAs over 100 lots with amenities that probably some level of mandatory training is good. There are a lot of insurance, liability, contractor management (w4's) etc. that once you have many lots and amenities you need a lot more knowledge. Our HOA has only 37 lots and no amenities. We have one contractor to mow lawn and take care of beds in common ground areas. That leaves the 50-100 in the middle somewhere. Probably drive by how many amenities/contractors are managed by the board.

*- Doug Cooper, **Harbor Oaks HOA** President*

Hidden Harbor HOA has eleven lots with six homes. I am very proud of the small group of members that volunteer their time to make our community great. I support offering optional education and training that has no cost to the HOA or individual Board members. However, I strongly disagree with making it mandatory to take these education and training classes, or charging for these classes, as that would make it very challenging to get HOA members to agree to take on Board responsibilities with this added burden.

- David McCurdy, Chairman of the Board/President

I am the current President of **StoneHaven Assoc. Inc.**, a community of 102 lots. We have a small group of volunteers who are willing to serve. Our population is aging and new families coming in are busy with life. While I am new to board service and appreciate the educational opportunity, mandating this along with continuing education requirements would be even more detrimental to our recruitment efforts. We have simple needs, no physical assets or amenities, and for our purposes this educational mandate would be unnecessary overkill.

- Dave Beadle

Oak Stone Shores is a small 27 member HOA. While we have good members willing to help out when needed, it is not always easy getting good board members. If we added mandatory training requirements it would be even more difficult to do so. Through the MLCA there are ample training opportunities and good advice on any situations that arise. We are absolutely opposed to Mandatory Board Member training.

- Tim Timmons, President

On behalf of the **Stoneledge at Lake Keowee HOA**, I can confirm our alignment with the MLCA on the above subject. We believe any training should be voluntary.

- Stephen Gosk, President

Stoneledge at Lake Keowee is a townhome community with 80 homes and only about 20 full time residents. Our past and current Board members have all served multiple terms. We are fortunate that these Board members continue to do so because it is challenging to find people to volunteer. Most owners just want to come and enjoy their lake house periodically and leave the management to others. Education should be offered at no cost and Board members should be encouraged to participate in education opportunities; however, to mandate this requirement could severely impact new owners' willingness to volunteer for these positions.

- Donna Furnari

Bookkeeper & Former Secretary and President

Wellington Pointe HOA has 33 lots and has concluded that something like training/information for board members is a good idea, and should be encouraged, but not be mandated. It runs along the lines of what is already offered by MLCA at their periodic meetings. The CAI organization most likely hears about neighborhood/board situations which they believe could be prevented or mitigated with some training. We're confident they would tell us that their proposed idea is designed to help protect board members from legal action. If there was a resource available on-line that was reasonable in length, boards could incorporate that into regular board meetings. We feel what is being proposed by CAI looks like overreach and would add

complexity and fear we don't need. We feel it's hard enough to get volunteers to serve as it is. Thanks for allowing us to weigh in.

- Mike Broe, President

*Required education for Board members of large HOAs is a fine idea. For small HOAs it is nonsense. **Keowee Shores HOA** (19 homes and 1 lot) would be unable to recruit officers from its members if training and updating were mandatory. Most are an officer only 2 or 4 years. It is not realistic or practical to require short term, volunteer officers to spend hours in training. It would seem that size matters, but not the number of units, rather the amount of dues and assessments being handled each year. Our annual budget is less than \$8000, and is spent entirely on electric, water, and landscape maintenance. Rather simple to administer, report, and monitor. Perhaps a threshold of a budget of several hundred thousand dollars, possibly combined with the presence of certain amenities such as a restaurant or pool or golf course would be appropriate for required education. Such facilities require professional management and Board members should have basic management expertise. But who requires education should be left to the communities themselves, not imposed by a third party, however concerned and well-meaning. A final note. Short sessions (less than 30 minutes) on specific topics might be of interest to some incoming officers. The same could be very useful to a small Board when an unusual situation is encountered involving dues, prohibited activities, etc.*

- Jerome Schmid, Treasurer and ex-President

***Cane Creek Harbor Owners Association** has 26 homes. Like other small communities, we have difficulty finding people who are willing and available to serve on the board. We fully support encouraging education and making it available to board members. That being said, making it mandatory would make it even more difficult to recruit for board positions. If training is developed, two hours of online training is an appropriate level of commitment for board members of small communities.*

Nick Gurreri

*I strongly agree that education should be offered and encouraged at minimal cost but not mandated. I am Treasurer for **Mountain View Bay POA** and thankfully received all of my education from MLCA to perform the required duties. MVB POA has less than 20 homes; some of those are part time. Mandating requirements would definitely affect the number of people willing to accept these positions.*

- Sue Wheeler

*The **High Hammock Homeowners Association (HHHA)** represents 15 lot/homeowners on High Hammock Drive in Seneca, SC. There are currently 11 homes built on those 15 lots; 5 of which are occupied by their owners full time. 6 of the 10 part-time lot/homeowners live a significant distance away from their properties. It is extremely difficult to find willing volunteers to serve as an officer and/or board member to serve in our HHHA. In my 8 years of living here, our three officers have had to double up as board members and all are full time residents. All have rotated through the officer or board member positions at least two and in some cases three, four, or five three-year terms. None of the part time residents have been willing to serve in any capacity as they claim they live too far away to be effective board members. Receiving continuing education regarding core competencies in HOA Board skills would be beneficial for*

those who felt the need to learn the responsibilities of board management. However, none of those who are currently serving on our board feel the need to be certified in any way to fulfill the needs of managing our small HHA. In fact, should the regulations to require such certifications to serve on the board of the HHA become effective, our current board would recommend that our HHA be dissolved and let each homeowner manage their property on their own. In summary, it is the strong recommendation of the HHA board that the CAI continue to encourage continuing education for those board members who feel they need further training to meet the needs of their HOA Board. Any move to require such training to serve on an HOA board would present an untenable situation for our small HHA to continue to exist.

- Drew Smith, President

*The **Crestview HOA** community consists of about 50 lots. Our HOA is self-managed. Over the years we have been fortunate in having dedicated people available to serve on our HOA board but the pool of people willing to serve is getting smaller. This is making it very difficult to convince people to serve on the board. Our HOA tries to take advantage of voluntary educational opportunities provided by MLCA and would encourage this activity to continue and to expand. We do not support making board member education mandatory. In our opinion mandatory education requirements would make recruiting new members to the board more difficult and possibly impossible. We think it is important that HOA board members be trained to properly understand and carry out their responsibilities. We suggest that CAI continue to encourage voluntary educational opportunities. We also recommend that CAI continue to pursue state funds to expand available training material. We feel an expanded educational voluntary approach could be an incentive for people to join HOA boards as it would be seen as a tool to assist them in carrying out their responsibilities as a board member. Unfortunately, the first thought to a mandatory approach to training could possibly be what are the consequences of not participating in the mandatory training.*

- Bob Ridge, President

I believe that mandatory education would severely hurt our chances of enlisting board members. It is wonderful if a free online course is available, but it should be at the discretion of the member.

*- Lena Fox, Treasurer, **Peninsula on North Lake Keowee HOA***

*On behalf of the **Parkview East POA** board of directors I would like to submit that it would be even more difficult to get owners to serve on our committee if there was a mandatory training requirement as mentioned. We have 60 lots and only 32 homes and it's difficult as it is to get people to get involved. I am in my second year as association president after serving 5 years as secretary. Optional training at no cost would be fantastic.*

- Suzanne Luna, President

I do believe the information would be very beneficial to all involved parties.

I also believe that creating a mandatory component to access any information and that allows us to interact with other communities would greatly hinder our ability to operate and impede our ability to retain or encourage community involvement. We are a small POA of 110 properties with less than 1/2 as full-time residents. Our monthly meetings, which are accessible via a Zoom link, averages less than 10% involvement excluding Board members. If the purpose of the

program is to enhance a POA/HOAs ability to better navigate today's world I'm certainly all for it but only in a voluntary setting.

*- Gary LeBlanc, President, **Peninsula Pointe South***

*I am a property owner in the **Peninsula Pointe South POA**. Our POA has about 111 property owners. I serve as Secretary on the Board. I was elected this past January to serve for the next 3 years. I am opposed to mandating a training requirement for board members to serve on HOA/POA boards. Serving on our board is an unpaid position that board members choose to take for the betterment of the community and maintaining our property values so that property owners can enjoy and protect the investments they have in their homes. Expecting board members to take mandatory training adds an additional hurdle to overcome in finding people who are willing to serve on the board. Being a board member is often already a time-consuming position. Adding the burden of mandatory training will make it even more difficult to find people willing to serve as board members. When I became a board member, I took it upon myself to read the South Carolina Homeowners Association Act, the South Carolina HOA Non-Profit Corporation Act and other on-line information about governance of HOA/POAs in South Carolina. The other board members on our board also seem knowledgeable about the state statutes and county ordinances that impact our association. Adding a mandatory requirement that they must take training seems very burdensome to me and will likely result in less effective boards, not more effective boards and may even result in boards being unable to fill their positions. I strongly support making training material readily available for board members to read on a voluntary basis, but I am absolutely opposed to a mandatory training requirement. The CAI should actively promote voluntary awareness of effective governance, not mandate how that is to be accomplished by each board.*

- Charlie Crawford, Board Member

*We, the elected Board Members of the **Pinnacle Pointe Owners Association** strongly object to HOA Board Members of "small" associations being required to obtain formal training to be a Board Member. We understand the concerns which may lead to requiring Board Member education, but believe it should be applied to much "larger" associations who have large budgets and assets and employees. We collectively have lived in Pinnacle Pointe for over 60 years. We have over 40 years of collective service on our Board of Directors and as chairpersons serving in different capacities. Pinnacle Pointe has 53 lots. The following are our thoughts. 1. It is difficult for small associations to find volunteers for our different responsibilities. Requiring volunteer education will make it "impossible" to fill our Board positions. Owners, reviewing candidate biographies prior to election, are qualified to choose Board Members. 2. We have no fixed assets nor direct employees, thus limited liability exposure. 3. Our budgets are relatively fixed. Our Bylaws require Owner approval of Budgets prior to spending. 4. Our Bylaws outline methodology to replace Board Members by objecting owners.*

- John Conway (Secretary), Bill Hughes (President), Eric Keller (VP), Kim McAninch (Treasurer), Tom Strother (Board Member)

I agree that volunteer board members would benefit from educational HOA classes. However, this should NOT be made mandatory. Like most small HOA, we would be less likely to recruit volunteers if we mandate their time.

- Susan Vigar, **Cane Creek Harbor HOA** Assistant Finance Director

Riverlake Property Owners Association has 49 lots, some of which are undeveloped lots, and some of which are owned by part-time residents. As such, it is always a challenge to recruit members who are willing to serve on the Board of Directors. While I think it would be helpful for the Community Associations Institute to strongly encourage education for board members, and to provide inexpensive opportunities to access this training, I believe requiring such training would result in making it even more difficult to enlist community members to serve on their board of directors, a critical necessity for maintaining our neighborhood.

- Riverlake POA Board

I serve as VP on the **Riverlake POA** board. I do not believe mandated training for board members is necessary in our smaller community. Former and current board members do a good job in preparing new members as needed. We struggle to get folks to serve and adding any requirements will make that even more difficult. Providing opportunities is positive but "requiring" someone who is serving freely would not be something I would support.

- Sherri Yarborough

I am the architectural chair for **Riverlake POA** and I disagree with the training requirements. We struggle every year to get volunteers to serve on the board and feel that added training requirements would deter people from volunteering.

- Cheryl Cappelli

I am a board member of the **Riverlake POA**. Our board is comprised of volunteers who have jobs and families to take care of. I am opposed to mandatory education regardless of cost. It's overkill and an example of government overstepping and over controlling. Voluntary education is enough.

- Mike Geib

I have just been appointed treasurer of our board because the current treasurer is moving. We are in **Riverlake**, a small neighborhood HOA of 50 lots. We have a lot of trouble getting board members and mandatory certification would cripple us. Please do not require more obstacles to hinder our efforts.

- Susan Girard

While HOA Board training should certainly be offered/encouraged, I do not believe it should be made mandatory. **The Battery on Keowee** is a very small community (only 16 lots/ homes).

I served as our HOA's original President for 6 years and have been its secretary now for an additional 4 years in large part because only a small number of owners have expressed a willingness to serve. The burden of mandatory training will only serve to exacerbate that problem.

- Stephen Beverly

Waterford Pointe is a community that is comprised of 228 lots and ~200 homes. Our board is in full support of the HOA board member training and feel it should be offered at no to minimal

*cost. This training should not be made mandatory, by legislative or by any other means. It should strictly be **VOLUNTARY**!!*

*- Jim Blass, President **Waterford Pointe Owners Association***

***Clear Water POA** is a small neighborhood – only 13 lots, 28 homes (currently). We have had a small core group who have served since the POA's inception. It is typically difficult to get people to serve. We agree that education/training should be offered (at no/minimal cost) , however it should not be made mandatory .*

-Jillian DiFazio, President

***Beacon Shores Owners Association (BSOA)** represents 118 privately owned lots, making it one of the largest HOAs on Lake Keowee. Volunteer leadership at the Board level is crucial to our ability to provide an attractive and well governed community benefiting all owners. Like many other Mountain Lakes' member associations, BSOA encounters difficulties recruiting new Board members. Mandating board member education – as proposed by the Community Associations Institute (CAI) - would likely add to our difficulty recruiting future Board members. While we heartily support continuing education, sharing of best practices and other improvement measures, we do not support any mandatory requirements as proposed by the CAI.*

- Patrick Carpenter, Board Director

*I represent **Waterstone POA**, in the role of President as of March of 2024 for a two-year term. We are a small community consisting of 27 lots. It is my opinion that training and certification should be optional versus mandatory. Since we are a small community, and several of our residents are part time, it is difficult to fill the board positions as it currently stands. The Corporate Transparency Act is also a deterrent for residents to want to be on the Board. Let's not complicate a system that works for most or fix something that isn't broken with bureaucracy!*

- Ann Simpson, President