2019 Florida Leadership Forum
Advocating with Impact
Overview of Today’s Presentation

• Data and Statistics
• The changing face of the community association housing model and the U.S; including demographic trends
• Legislative Trends
• Effective Advocacy
Florida Community Associations

facts & figures

» Approximately 9,660,000 Floridians live in 3,683,500 homes in 47,900 community associations.

» These residents pay $13 billion a year to maintain their communities. These costs would otherwise fall to the local government.

» 331,000 Floridians are elected to their community association boards each year, providing $270 million in service.

» Homes in community associations are generally valued at least 5–6%* more than other homes.

» By 2040 the community association housing model is expected to become the most common form of housing.
US Community Associations & Residents

342,000
US community associations and housing units.

5.5 trillion
Value of homes in community associations.

69 million
Americans living in community associations.

2,360,000
Americans serve on community association boards and committees.

80,000,000
Hours of service performed annually by association board and committee members.
Population distribution in 2040

2016 analysis by Demographics Research Group, Weldon Cooper Center for Public Service, University of Virginia.

- STATES MAKING UP HALF POPULATION
- NEXT 20 PERCENT
- 30 PERCENT OF POPULATION
CHANGING FACE OF AMERICA
Percent of total U.S. population by race and ethnicity, 1960-2060

1960
10%
85%

2010
16%
12%
64%

2060
31%
13%
43%

OTHER
ASIAN
HISPANIC
BLACK
WHITE

SOURCE: PEW RESEARCH CENTER

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MULTIPLE GENERATIONS @ WORK

Five Generations Working Side by Side in 2020

**TRADITIONALISTS**
Born 1900-1945
- Great Depression
- World War II
- Disciplined
- Workplace Loyalty
- Move to the ‘Burbs
- Vaccines

**BOOMERS**
Born 1946-1964
- Vietnam, Moon Landing
- Rights
- Fall of Berlin Wall
- Independent
- Hard Working
- Personal Computer

**GEN X**
Born 1965-1976
- Civil/Women’s Rights
- Experimental
- Gulf War
- Free Agents
- Internet, MTV, AIDS
- Mobile Phone

**MILLENNIALS**
Born 1977-1997
- 9/11 Attacks
- Community Service
- Confident, Diversity
- Social Everything
- Google, Facebook

**GEN 2020**
After 1997
- Age 15 and Younger
- Optimistic
- High Expectations
- Apps
- Social Games
- Tablet Devices
According to Zillow, buyers remain the most dynamic segment of the housing market, with Millennials, those between the ages of 24 and 38, comprising the single largest share of all buyers and the largest group of first-time buyers.
Glimpse at the future landscape

PRESENT
Fertilization of Naturally Occurring Retirement Communities (NORCs)
Bachelor's degree a prerequisite to community management certification
Tremendous leaps in technology facilitating virtual meetings, virtual offices, home-based employment
Millennials now 33-49 and in need of housing

10-15 YEARS

20-30 YEARS
Critical shift—community association model becomes the majority form of housing

45 YEARS
Hispanics and Asians comprise 39% of the population

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Get the REAL facts about Community Association Living

85% of residents rate their overall community association experience as positive (63%) or neutral (22%).

90% say their association’s rules protect and enhance property values (62%) or have a neutral effect (28%); only 4% say the rules harm property values.

69 million Americans live in community associations
2019 State Legislative Priorities

Warranties for New Construction
CAI advocates for legislation and regulations strengthening protections for purchasers of new construction with laws that adequately balance the rights and responsibilities of community associations, their governing boards, homeowners, builders, and construction affiliates.

Dispute Resolution for Residents
CAI advocates for communities to adopt policies that offer resolutions for disputes between individual homeowners and the association.

Priority Lien for Collecting Delinquent Assessments
CAI advocates, at a minimum, for states to adopt the 2014 revised version of the Uniform Common Interest Ownership Act (UCIOA). Priority lien statutes serve to effectively preserve property values and balance the interests of homeowners in community associations and lenders and are the reasonable solution to abandoned property, community blight, and zombie foreclosures.

Sales Disclosure
CAI advocates for mandates requiring all ownership transfers of homes or units in a community association disclose documents/resale certificates and supports the preparer’s right to charge a reasonable fee for the production of such documents.

Community Values
CAI advocates for legislatures and regulatory agencies to acknowledge the right of self-determination by owners who elect volunteers and have a vested interest in their communities. Communities should have the power to decide policies on issues such as vacation rentals, solar panels, electric vehicle charging stations, landscaping requirements, and more.

Regulation of Community Managers
CAI advocates for industry-developed professional certifications or designation programs for community managers so they can self-regulate. If regulation is bound, CAI supports a regulatory system that incorporates protections for homeowners, mandatory education and testing on fundamental community association management knowledge, standards of conduct, and appropriate insurance requirements.

Reserve Requirements
CAI advocates for developers to transition communities with a current reserve study budget that includes both operations and reserves and initial funding of reserves for future maintenance, repair/replacement of facilities/equipment.

CAI advocates for laws that allow governing boards to determine the appropriate reserve level and method for funding long-term maintenance, repair/replacement of facilities/equipment and disclose the reserve study used by their community.

HOA or Condo Uniform Acts
CAI advocates for the adoption of Uniform Common Interest Ownership Act (UCIOA). In those states where it is not possible to adopt the act in its entirety, CAI supports and recommends consideration of appropriate portions of this law.

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CAI advocates for federal financial incentives to increase responsible homeownership opportunities for consumers through the construction or rehabilitation of affordable housing units within the community association housing model.

CAI will monitor the conditions of federal funding when streamlining state and local permitting requirements.
AMATEUR RADIO AND ASSOCIATION ARCHITECTURAL STANDARDS

HOUSING FINANCE POLICY

FAIR HOUSING ACT AND ASSISTANCE ANIMALS

COMMUNICATIONS INFRASTRUCTURE DEVELOPMENT

POST-PETITION ASSESSMENTS IN CHAPTER 13 BANKRUPTCY PROCEEDINGS

GROWTH AND STABILITY OF THE FHA CONDOMINIUM PROGRAM
Your Role as an Advocate

We Need You
Whose Voice Do You Want Heard by Legislators?

Random complaining resident?

Amazing, hard-working, selfless Coop Board?
Effective Advocacy
When Meeting with a Legislator

• Personalized vs. Form? Both
• Be concise, direct and persuasive, and clearly state your position.
• Include personal stories of how legislation will affect you.
• Make a specific request.
• Be respectful.
Direct constituent interactions have more influence on lawmakers’ decisions.  *(Source Congressional Management Foundation 2016 Survey)*

If your Member/Senator has not already arrived at a firm decision on an issue, how much influence might the following advocacy strategies directed to the Washington office have on his/her decision.

<table>
<thead>
<tr>
<th>Advocacy Strategy</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Email Message</td>
<td>50%</td>
</tr>
<tr>
<td>Visit from a Lobbyist</td>
<td>80%</td>
</tr>
<tr>
<td>Letter to Editor References Your Visit from a Lobbyist</td>
<td>90%</td>
</tr>
<tr>
<td>Phone Calls</td>
<td>90%</td>
</tr>
<tr>
<td>Comments During Telephoneic Town Hall</td>
<td>90%</td>
</tr>
<tr>
<td>Local Editorial Reinforcing Issue Pending</td>
<td>90%</td>
</tr>
<tr>
<td>Individual Postage Letters</td>
<td>90%</td>
</tr>
<tr>
<td>Individual Email Messages</td>
<td>90%</td>
</tr>
<tr>
<td>Contact from Constituents' Representatives</td>
<td>90%</td>
</tr>
<tr>
<td>In-Person Issue Visits from Constituents</td>
<td>90%</td>
</tr>
</tbody>
</table>
Congress places a high value on groups who have built relationships with the legislator and staff.

In our opinion, how important is each for understanding constituents' views and opinions?

- Telephone town hall meetings: 74%
- In-person town hall meetings: 82%
- District/state office hours: 86%
- Personalized messages from constituents: 95%
- Meetings between the Member/Senator and constituents: 98%
- Attending events in the district/state: 98%
- Communications from representatives of...: 99%
- Meetings between staff and constituents: 99%
Steps to Avoid Legislation

• Best practices in...
  • Communications
  • Transparency
  • Reasonableness
  • Building Community
  • Civility
We, the Board members of the Sunriver Owners Association, expect our community climate to be safe, secure, mutually respectful, and tolerant of its staff, volunteers and all of its members.

We expect a community free of incidents that create a hostile working or living environment.

We expect a healthy and responsible attitude to accompany all interactions in the community.

We expect all SROA members and guests to respect association staff and volunteers and other persons in the community regardless of their actual or perceived age, color, creed, disability, gender identity, national origin, race, religion, sex, or sexual orientation.

A vibrant, thriving community is made up of individuals who model these standards and hold each other accountable. In order for the community to encompass the goals outlined above, each individual must be responsible and accountable for her or his own actions and words.
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