

# *HOA Questions and Answers*

## DOES “NEW MANAGEMENT” MEAN WE LOSE OUR CURRENT STAFF?



Whether you're a self-managed HOA selecting a management partner for the first time, or an association switching management companies, the prospect of change can be scary.

**Having a manager and staff you love (*and want to keep*) can make change even more difficult.** Your staff plays a vital role in your resident experience, reputation and property values (potential homeowners may not like a community where staff members don't care or aren't happy). For that reason, many boards worry that changing management companies means they will lose their staff.





# DOES TRANSITIONING TO A NEW MANAGEMENT COMPANY MEAN YOU MUST GIVE UP YOUR EXISTING STAFF?

The short answer is **NO!**

The long answer is that **it often depends on the management partner you choose.**

A great transition requires that you partner with a company that values your staff and works to ensure that your board, residents and the associates who serve your community are **fully supported**. That means going above and beyond to onboard, provide resources and conduct training throughout the transition process.



**SHANE GILLASPIE** | Executive Vice President

*“We have a transition team, a training team and an HR team – all of which have an active hand in ensuring that we’re doing what’s best for the associates coming in. We’ve been very successful at our initial meetings and figuring out ways that we can better support them. Our goal is to transition 100% of the team.”*

**Shane Gillaspie,**  
Executive Vice President,  
FirstService Residential

Watch a video to see why associate support is key during a transition: <https://bit.ly/Staff-Vid-CA>

# WHAT HAPPENS TO OUR STAFF WHEN WE CHANGE MANAGEMENT COMPANIES?

Your new management company should have a strong transition plan in place to ensure your staff feel supported and valued during a change.

**FirstService Residential has a transition team that is dedicated solely to the task of managing association transitions.** Each team member specializes in a particular aspect of the transition [e.g., human resources (HR), training, project management, etc.], and together they address any gaps to ensure a smooth transition. Here are just a few examples of how the transition team works with your staff.

## 1. CONSISTENT AND PROACTIVE COMMUNICATION

Communication is a crucial aspect of the transition period. It is important for association staff to feel welcomed, understand the changes and have an opportunity to ask questions to reduce uneasiness. To that end, the FirstService Residential team communicates with associates from day 1, letting them know what the transition process will look like and what to expect.

## 2. BENEFIT AND POLICY REVIEW

An HR representative from the client transition team provides a warm welcome to the associates and walks them through their new benefits under the FirstService Residential umbrella. At FirstService Residential, associates often experience an improvement to their health and ancillary benefit offerings. Additionally, the HR representative informs new staff of corporate culture, policies and procedures.

## 3. TRAINING AND TECHNOLOGY SUPPORT

Training or HR representatives on the transition team provide extensive instruction and support as associates are onboarded. This approach is designed to ease the transition, help associates understand the culture and bring them up to speed on technologies and platforms that they may use (e.g., FirstService Residential Connect, ADP, etc.).

### **IMPORTANT:**

During the transition process, FirstService Residential conducts background checks and evaluates past employee performance. It then discusses its findings with the association board. If the board determines that it wants to separate from any employees, it should consider doing so prior to the transition to the new company.



# HOW DO WE KEEP OUR STAFF?

Ensuring that staff are protected, valued and supported during a management change requires a team of dedicated transition specialists. How do you know if you will receive that support when hiring a new management company? Here are a few questions you should ask before you sign a new partner:

## 1. WHO WILL BE MANAGING OUR TRANSITION PROCESS?

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## 2. WHO WILL BE OUR PRIMARY CONTACT?

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## 3. WHEN DOES THE TRANSITION PROCESS BEGIN?

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**TIP:** Make sure that the company provides a dedicated transition team, not a busy community manager who steps in as needed. The team should include a transition lead and specialists, as well as professionals with expertise in HR, accounting and IT.

**TIP:** Your primary contact will be the point person to answer questions from board members and homeowners. At FirstService Residential, the primary transition contact also remains available for at least 60 days after the transition is complete.

**TIP:** Your new management company should start transitioning your community as soon as you sign a contract, even though the contract may not start for 30 to 60 days.




#### 4. CAN HOMEOWNERS CONTACT THE TRANSITION TEAM DIRECTLY?

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**TIP:** The answer should be an emphatic YES! Homeowners should be able to directly contact the transition team, as they are the most involved with every transition detail.


#### 5. HOW LONG WILL THE TRANSITION TEAM BE AVAILABLE AFTER OUR START DATE?

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**TIP:** Even though you will have a manager who should have the support of a robust team, you likely will still need the specialized expertise of your transition team for some HR, accounting or IT matters. They should also be available for at least 60 days after the start date.


#### 6. HOW DO YOU HANDLE EXISTING STAFF?

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**TIP:** Transitioning associates from one management company to another can be a positive experience if the incoming company communicates thoroughly and provides proper training.

A great management company with a dedicated transition team will help ease any worries your board may have about losing important staff members. Associates will also benefit from the resources that come when transitioning to a robust, full-service management company. To learn more about the benefits of a dedicated transition team, [contact us today](#).

# ABOUT FIRSTSERVICE RESIDENTIAL

FirstService Residential is North America's property management leader, partnering with more than 8,500 communities across the U.S. and Canada. HOAs, community associations, condos and strata corporations rely on our extensive experience, resources and local expertise to maximize their property values and enhance their residents' lifestyles. Dedicated to making a difference, every day, we go above and beyond to deliver exceptional service. FirstService Residential is a subsidiary of FirstService Corporation (FSV), a North American leader in the property services sector. Find out how we can help your community thrive. Visit [www.fsresidential.com/california](http://www.fsresidential.com/california).



## *Meet the Team!*

To watch a quick video and meet your HOA and high-rise solutions team, scan the QR code with your phone or go to:  
<https://bit.ly/Contact-Us-CA>

