

WELCOMING CHANGE

Smooth Staff Transitions

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**Smooth staff
changes require a
well-established
transition process.**

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Sooner or later, most associations face some kind of staff change. The manager you've had for years may retire, get promoted or simply move on to another professional opportunity. Additionally, if your community is self-managed, your board may decide to partner with a management company to relieve some of its responsibilities. Lastly, changes in other staff — like administrative assistants, landscapers and housekeepers — play a significant role in how your community runs each day.

This can be unsettling for boards and residents alike — change brings challenges! However, if your management company has a proven process that transfers manager duties with ease, it doesn't have to be unsettling.

Keep in mind that not all staff changes are alike or require the same level of support. A manager transition for a 150-unit single-family home community with 2 staff members is less complex than a 5,000-home master-planned community with on-site staff and amenities. Your management company should provide an appropriate level of support for your unique community.

This guide explores how a resourceful management company can minimize disruptions during staff changes while delivering the same quality of care.

Bringing on a New Manager



A good manager looks for [growth opportunities within a management company](#) that prides itself on training and upward mobility. This means that eventually, your beloved manager may be promoted and assigned to a different location. Retirement or other life circumstances may also be a factor in your manager leaving their position. Whatever the reason, your management company's focus should be filling the vacancy with another qualified individual.

Who has the institutional knowledge?

Changing managers can raise a lot of questions for a community: How long will it take the new manager to get up to speed? How will our new manager learn everything our old manager knew? Who should residents contact in the interim? How will the association's finances and records be maintained? Who will oversee ongoing maintenance, capital improvement projects and other activities?

Change is a common occurrence throughout the association management industry. Although boards often view manager turnover as a negative against their management company, it doesn't have to be! Ensuring there's an effective management team approach will help set the tone for the staff transition process.

If the company applies a management team approach, knowledge about your community won't

just reside with one person. A regional director or senior leader, who works closely with your manager, will also have a direct relationship with board members and be familiar with your community's needs, projects and issues. They will make sure everything stays on track while your new manager gets settled in. Local and regional support specialists in accounting, human resources and technology will have insight into your community, too.

FirstService Residential Connect, a proprietary and secure platform, saves valuable information and tasks related to your community or building.

A quality management company can also make it easier for the management team to share knowledge and stay up to date by implementing a secure technology platform to centralize your association's information. For instance, FirstService Residential Connect, a proprietary and secure technology platform, saves valuable information and tasks related to your community or building. This way, whether your current manager leaves or simply takes a day off, a team of equally informed associates can access that information to quickly get up to speed about your community.

Finding the right fit

A key member of a management dream team is the regional director or senior leader. Since they're familiar with your community and have a direct relationship with the board, they understand what you need in a manager. As a result, they are better qualified to find a capable manager who meets your association's specific needs and whose personality fits in with your community.

It's also important for a company to have a standard hiring process for new managers to reduce community disruption and ensure residents experience the same quality of service no matter who steps in as the new manager. This process should be driven by your management company's human resources (HR) department and include a reliable vetting method, robust onboarding procedures and information about how these changes should be communicated to residents.

Boards should also feel confident that the right management company has the resources and expertise to find the best fit for their association. Your management company should provide training, a great culture and comprehensive benefits, so that they can attract the right candidates from the start.

Additionally, your management company's steady investment in staff training should enhance a new manager's skills and qualifications. That means hosting year-round, in-person and digital courses that keep staff in the know about industry best practices and how they can be shaped to serve communities with unique needs.

A good management company should also provide your community with answers and peace of mind during this transition process via a strong support system that includes:

- » Accounting team
- » Community support teams
- » Regional director/senior leader and operations team
- » Specialized administration team
- » 24/7 customer care center
- » HR team



Your Smooth Staff Transition



The right association management company should guide you through smooth staff changes while being organized and prepared to address board and resident needs. Communities with access to a support team dedicated to ensuring a positive experience can avoid potential snags during and after the process.

A management company with the resources and processes to handle staff changes should inspire confidence that the association's needs will be met. One such need is a communication strategy for your board and residents during the transition.

An effective communication plan

The glue that holds a successful staff transition together is communication. The regional director or senior leader should frequently communicate with other team members and the board to address completed tasks, remaining issues and upcoming action items.

It's equally important to communicate with residents about any changes to reduce concerns and prevent the spread of misinformation.

Who should make up your support team?

Navigating through staff changes is much easier when you have a support team composed of specialized experts. This team should include:

- » **Regional director or senior leader.** As the team's hub, this person acts as the project manager and primary point of contact. They coordinate the work of the other team members and set goals and timelines.
- » **Administrative support.** Depending on the size and complexity of your community or building, the regional director or senior leader will need one or more assistants to collect and organize documents and handle administrative tasks.

- » **Accounting.** This role is critical and ensures financials and budgets remain in order when the manager changes.
- » **24/7 customer care center.** When transitioning from one manager to another, the ideal management company should have a responsive customer care center for residents to call, day or night, to ask common questions about personal accounts, document requests and more. Having a customer care center allows the entire support team to focus on your timeline while minimizing resident disruptions with real-time, real-person answers for their biggest questions.
- » **Tools and technologies.** It's key to have resources and tools that help store and communicate important information during a manager or staff transition. For example, tools like FirstService Residential Connect allow tasks to be calendared and essential community information to be shared with new managers.
- » **Human resources.** An experienced and dedicated HR team can assist associations by vetting new candidates through a comprehensive pre-screening process and coordinating multiple interviews. Once the appropriate associates are selected, HR ensures they are welcomed, onboarded with training and provided information on payroll, benefits and policies.

“At FirstService Residential, we are extremely proud of the depth of our resources we have to find, develop and keep top talent,” says Paula Allen, vice president of human resources at FirstService Residential. “This strength allows us to deliver our standard of excellence during any manager transition.”





Transitioning From Self-Managed to a Management Partner

Many aspects of the transition process are the same for self-managed communities who transition to an association management partnership. Still, there are additional aspects to consider.

The status of existing employees

As a self-managed association, you may have hired a manager and other on-site staff to help run your community. If your board wants to separate from one of these employees, a management company that has an HR specialist on the support team can bring value during the decision-making process and most importantly, protect you from legal risk and liability.

On the other hand, if you want to keep employees after partnering with a management company, having an HR support team simplifies that process, too. The HR support team is there to help with all types of personnel issues, from onboarding existing and new employees and protecting your board from unintended legal and liability issues related to employment regulations. The truth is, many boards do not want to absorb the personal risk and work associated with being an employer.

Unexpected savings

Many communities choose to be self-managed to save money. However, partnering with a great association management company often provides greater value and savings. During the transition, a company with accounting specialists, human resources, IT experts, administrative consultants and operation professionals will review current contracts, investments and insurance policies to find areas they can provide more value for your money.

Board involvement

A common fear for self-managed associations is that a management company will reduce the board's control over association activities. However, the best management company partners will work collaboratively with the board and ultimately at their direction.

“We provide support and new expertise, but we aren't looking to come in and change everything,” says Stephanie Parker, vice president of operations at FirstService Residential. “We're looking to make enhancements to the community and complement what the board is doing.”



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When you hire a new manager or staff member, the transition process sets the stage for your community's future. A good management company should have the resources and organization to provide a team of experts that will make staff changes smooth and worry-free. As you evaluate your new manager or prospective staff members, be sure to ask your management company these 8 questions about their new staff member protocol.

8 Questions FOR SUCCESSFUL STAFF CHANGES

- ☐ **Who will be managing our staff changes?**
The support team should include a regional director or senior leader, and professionals with expertise in HR, accounting, IT and lifestyle/resident experience.
- ☐ **Will board members be able to contact the support team directly?**
Being able to contact someone with questions and concerns goes a long way toward helping board members feel confident. It's also important to have a support team that's knowledgeable, communicative and responsive.
- ☐ **Who will be our primary contact?**
Effective team communication is essential during this transition phase. You'll want to have a go-to person on the support team, so board members and homeowners don't receive inconsistent information or waste time on issues that have already been resolved.
- ☐ **When does the staff transition process begin?**
Your management company should supply a timeline to your community as soon as a staff change occurs.
- ☐ **Will off-site help be available to your community during the onboarding of the new manager?**
To ensure that day-to-day tasks continue to run smoothly, your management company should be able to provide your board and community with off-site administrative support during and after the onboarding period of your new manager.
- ☐ **How will residents be informed about staff changes?**
A good management company should send out welcome notices, provide meet and greet opportunities and post notices via email, social media and text message informing the community about a new staff member or staff change in the management company.
- ☐ **How do you handle existing staff?** Your management company should have an established process for introducing new staff members to the community.
- ☐ **How do you handle vendors and contractors?**
Your management company should inform your vetted contractors and suppliers about new staff members.

Welcoming Change: Smooth Staff Transitions



Whether your community is getting a new manager or staff, or transitioning from self-managed to a management partnership, the process is what sets the tone for the future success of your community. Change may be inevitable, but when handled properly, it can be a welcomed opportunity to fuel residents' energy and create a new sense of purpose that benefits the entire community.

To learn more about how to make staff changes go more smoothly, [contact FirstService Residential](#) today!



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About FirstService Residential

FirstService Residential is North America's property management leader, partnering with 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.

