



# COMMUNITY CONNECTION

HOLIDAY 2019



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And Looking Ahead to 2020

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**2019 CAI-MN VISION AWARDS**  
Winners & Finalists

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**CASE STUDY: CONDOS AT LAKE HARRIET**  
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### 2019 CAI-MN VISION AWARDS

*Congratulations to FirstService Residential  
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*Learn interesting statistics  
about how this hard-working  
team serves you!*

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Message from Mark Gittleman

# FirstService Residential Minnesota President



Mark Gittleman, President  
FirstService Residential Minnesota

*“I am pleased that this year we hired over 110 associates—including seven Association Managers who joined us from other management companies—while we also improved our associate retention from 92.56% to 97% over last year.”*

—Mark Gittleman



**FirstService**  
RESIDENTIAL

**Dear FirstService Residential Board Members,**

*We are delighted to report that FirstService Residential has made some significant accomplishments in 2019 as we prepare to close out the year.*

On the people front, we have strengthened our position in the marketplace as a great place to work. This is a top area of focus for us as we are only as good as our people.

**A few highlights of our human capital accomplishments include:**

- Relocated [#aroundthecorner](#) into a great new main corporate office workplace providing our associates with a great place to work.
- Hired over 110 associates at our corporate office, sited communities, and Gittleman Construction & Maintenance including seven Association Managers who joined us from other management companies.
- Improved our annual retention of associates from 92.56% to 97% from 2018 to 2019.
- Updated job descriptions across the organization to support consistency on job structures and clarity of expectations.
- Rolled out a week long training program for Association Managers.
- Expanded the reach of our FirstLeader leadership development program.
- Introduced an enhanced web-based performance management tool.
- Expanded our weekly *Hi-Rise* associate newsletter to increase communication every week with all our associates.



*Mark and Andy Gittleman with their mom, Chelle Gittleman, at our [#aroundthecorner](#) open house event.*

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Message from Mark Gittleman

# FirstService Residential Minnesota President

Continued from page 3.

**On the service excellence front, we are on track in 2019 to achieve the following:**

- A client retention target of over 97%.
- An upward trajectory on client experience with increased positive feedback, engagement, and follow up through our client experience survey tool.
- Completion of the roll out of the new management agreement form to clients that better aligns our services and client expectations.
- A significant increase in board training sessions.
- Overall improvements in the quality and cadence of management reports, client communication updates, quarterly client newsletters.

We are also delighted with the recognition of our brand and service level commitment in the marketplace contributing to our biggest year ever in new account starts. We look forward to your ongoing feedback to continue improving our services as we head into 2020 and are thankful for the opportunity to serve your community.

Best wishes to you and yours during the holiday season.

Mark Gittleman



President

FirstService Residential Minnesota



**We learn from  
our experiences.**

We are open-minded, collaborative, and continuously looking for ways to improve.



**FirstService**  
RESIDENTIAL

# 2019: A YEAR IN REVIEW

## And Looking Ahead to 2020

### Manager's Training

Based on surveys conducted by FirstService Residential, our Board Members have made it clear that Capable Managers and Staff is the #1 Differentiator for them. In July 2019, FirstService Residential Minnesota hired Training Manager Kelly Stevens.



Kelly Stevens  
Training Manager

Kelly joined FirstService Residential after working fifteen years in the Educational Assessment industry. She designed and delivered training for clients across the country in the areas of instructional design, assessment development, training effectiveness, on-boarding and employee development. Kelly earned a master's degree in Educational Psychology.

Since July, Kelly has been busy developing and introducing an on-boarding and training program for Association Managers to ensure that FirstService Residential is preparing them to provide best-in-class services to the Associations they manage.

FirstService Residential attracts and retains the BEST people and provides them with the training they need to be successful and that is consistent with our values and global service standards. We want our Association Managers equipped with the industry knowledge and a deep understanding of what makes us a differentiator in property services and supports them with experts in all of the relevant fields.

FirstService Residential believes that our Association Manager Training Program is the first step of an ongoing program of learning and development for our Managers as well as for the teams who support them.

“Our ultimate goal is not only to build knowledge and capabilities,” says Stevens. “It is to develop managers who understand that their role is one of trust building and relationship management, leading to happy clients.”

Going forward into 2020, Manager's Training will be held monthly.



Over 100 Board members attended the September Reserve Studies Training Seminar held at the Bloomington Corporate Training Center. Board training is held at both urban and suburban locations.

### Board Training

In 2019 FirstService Residential increased the number of Board Training Sessions in the Twin Cities from 6 to 15 and increased Board Member participation from 223 to approximately 500, with average participant scores exceeding 9 out of 10.

*Training topics include: Board Basics, Insurance, Legal Issues and Trends, and Reserve Studies and Project Funding Options.*

Looking into 2020, FirstService Residential will increase these well attended Board Training Seminars for both Urban and Suburban Board Members.



Manager's training equips our associates to serve you with success.

# 2019: A YEAR IN REVIEW

## And Looking Ahead to 2020

### After 21 years, FirstService Residential MN moves #aroundthecorner

From cube walls to open spaces, the new high-tech Bloomington corporate office, welcomed Board members and guests to our Open House on September 26, 2019.

FirstService Residential Association Managers, Regional Directors, and members of the Minnesota and North Region Leadership Teams provided guests with guided tours through the new office space. Amenities include a centrally located work cafe and state-of-the-art training room, open office layout with plenty of daylight, bike lockers and shower for those who enjoy working out while getting to work, a quiet space for new mothers, an executive conference room, and plenty of break out space for planned and spontaneous collaboration.

During the open house, two training seminars were held: Insurance Claim Process led by Mark Gittleman, President and Shaun Zavadsky, Vice President, Community Management and Understanding HOA Financials led by Daphne Moran, Director, Client Accounting. Guests were also entertained by a live jazz band over great conversations and enjoyed delicious food prepared by local food trucks.

In honor of our Open House guests, FirstService Residential donated over \$1,000 to the following partner community organizations: Second Harvest Heartland, Habitat for Humanity, and ThreeRivers Park District.



For everyone who came to celebrate our new digs #aroundthecorner enjoyed a guided tour, live music, great conversation, delicious refreshments, and learned something new from one of the training seminars offered.



# *Congratulations* 2019 FirstService Residential Association & Associate **VISION AWARD FINALIST AWARD WINNERS!**

## FirstService Residential Wins Top Property Management Industry Awards

FirstService Residential associates and our clients received outstanding recognition at the 2019 Community Association Institute of Minnesota (CAI-MN) Vision Awards held Thursday, December 5th at the DoubleTree Bloomington. A big congratulations to all of our nominee finalists, and an extra big congratulations to

the award winners. FirstService Residential associates and client associations were finalists in all six categories and were winners in three of them. These awards are judged blindly by independent reviewers and represent the best of what our associates and clients accomplish together.

*“Winning these awards affirms our strategy of hiring and developing the most talented professionals in the industry and providing them with support, best practices, and platforms to partner effectively with our client boards and communities,” says Sally Andrist, Director of Human Resources.*



FirstService Residential Community Manager Bill Hauge with Grant Park Association Board members.

### Outstanding Community-Building by an Association

Grant Park Condominium Association in downtown Minneapolis was recognized for the vibrancy of its community building thanks to a dedicated Board of Directors, Social Committee, Welcome Committee, and engaged residents who form relationships with each other and within the neighborhood. The Grant Park Social Committee has helped build a strong sense of community through Board-approved annual funded activities. An event calendar is published weekly and distributed to Grant Park residents. The Welcome Committee holds Newcomers' Orientations quarterly for new residents. Many residents are involved in the community through Elliot Park Neighborhood Association and its community-based organizations and have devoted significant hours beautifying the city through Friends of Triangle Park and The Porkchop.



Maggie Mahmood  
Association Manager

### Above and Beyond

As an experienced and diversely skilled Association Manager, Maggie Mahmood, led a \$375K capital project to address water intrusion for a community of 62 twin homes and 31 buildings (June 2018–October 2019) with dedication and patience. She managed the financial, vendor and construction end as well as helped lead the Board and communicated with the homeowners throughout the project. To say she went “above and beyond” in her efforts on this complicated project would be an understatement.



Jessica Hamilton  
Association Manager

### Excellence in Service

Owners, Board members, Association members, colleagues, and vendors describe Association Manager Jessica Hamilton, AMS as a clear communicator, knowledgeable, effective, caring, dependable, organized, and responsive. In 2018-2019, Jessica successfully managed \$2.4 million in capital projects and has maintained a 100% retention rate.

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# Congratulations 2019 FirstService Residential Association & Associate VISION AWARD FINALISTS!



Board members from Grant Park and Dancing Waters joined FirstService Residential as Finalists in the "Outstanding Community-Building by an Association" category at the 2019 Vision Awards. Congratulations to both communities for their outstanding work and to Grant Park for winning this award.

## Outstanding Community-Building by an Association

Dancing Waters Master is an HOA of 956 units. Popular community attractions include the pool and splash pad during summer months, the hockey and pleasure rinks enjoyed each winter, and the annual "Night to Unite" community festival. To build a strong neighborhood, the community made an acquisition of five vacant lots to create more amenities for the community and formed an Amenity Planning Committee; invested in landscaping; and made upgrades to the community pool and ice rinks.



Jodi Schramel, Bright KEYS Board President is pictured with Vision Award winner Jessica Hamilton. Bright KEYS was a finalist in the "Association of the Year" category thanks to Jodi's dedication to her community.

## Association of the Year

Bright KEYS of Stone Meadow is a successful community in large part because of its Board president, Jodi Schramel, who has gone above and beyond the call of duty for the last six years. Jodi helped reverse the community's low reserves in 2015 and has helped the community become financially sound. She welcomes resident feedback to improve Board function and keeps the community's best interest in mind.



Matt Barker  
Association Manager

## Rookie of the Year

In his first year as an Association Manager, Matt Barker, managed a portfolio of as many as 12 properties including a large master 2,800 home community with 32 subs. Within his first six months, Matt addressed and resolved several serious issues with one of these properties. These issues included accounting, governing documents, and a large shared septic system.



Erin Basavage  
Association Manager

## Rookie of the Year

While managing a portfolio of properties as a rookie Association Manager, Erin Basavage also handled a 2.2-million-dollar exterior siding and HVAC settlement project for a 93-unit condo building. She did an outstanding job communicating with contractors and homeowners throughout the project.



Allison Renslow  
Association Manager

## Excellence in Service

Association Manager Allison Renslow, AMS oversaw a \$4.2-million capital replacement project at a condo association with older infrastructure. She communicates effectively with Board members, residents, vendors, and contractors which became evident when she helped the community work through a catastrophic flooding event.



Nikki Bjerke  
Association Manager

## Financial Impact

Nikki Bjerke, Association Manager, inherited an association with a decade-old construction defect. She navigated with the Board and homeowners the issues and developed a detailed plan and funding for the \$2.8 million-dollar project; worked with the Board to bid and secure a contractor; navigated a substantial special assessment to the homeowners; and secured a competitive loan to help remedy this complex issue for the association.

FirstService Residential Minnesota also received recognition for the greatest number of Association Managers in our marketplace earning their Certified Manager of Communication Associations (CMCA) and Association Manager Specialist (AMS) designations in 2019; for Shaun Zavadsky, Vice President, Community Management, who serves on the CAI-MN Board, and for Crystal Pingel, Association Manager, who chaired the 2019 CAI-MN Golf Event.



# CASE STUDY: CONDOS AT LAKE HARRIET

## How Teamwork Saved Residents from a Cold Shower

A few years ago, Gittleman Construction and Maintenance (GCM) was dispatched to investigate a leak in the mechanical room at The Condos at Lake Harriet, an older, mid-sized property association.

### The problem

The GCM technician arrived on a Thursday afternoon and discovered that their older domestic hot water tank was leaking again. It had been patch welded several times before to stop leaks.

Because steel storage tanks are considered pressure vessels, repairs needed to be performed by certified pressure welder. GCM contacted Moorhead Boiler who arrived first thing Friday morning. Also arriving that morning were GCM Plumbing Service Manager, Jim Venhuizen and Director of Maintenance Operations, Peter Ralph with the Property Manager to evaluate the options.

By Friday morning, hot water was leaking so profusely that the tank had to be shut down to the building. Unfortunately the tank had become so corroded over the years that it was beyond even a temporary repair, and it was too large to remove.

### Gittleman Construction & Maintenance offers a proactive solution

Within an hour GCM formulated a solution. They would abandon the old tank, install a new vertical glass-lined storage tank, pipework from the existing heating boiler, and re-pipe the tank to a summer hot water heater with pumps and controls for year-round operation.

The Property Manager approved the solution, yet was concerned about angry residents waking up to cold showers Saturday morning.

By 4pm Friday, all of GCM's plumbers were on site. They began demoing pipework while one of the HVAC techs picked up supplies.

The team called spouses and worked through the night with jovial camaraderie. Pizzas were delivered, energy drinks were consumed (while saws and hammer drills might have kept a few people awake).



At approximately 4am Saturday morning, GMC turned on the water, gas and electric, and began making hot water.

After a few high fives and a call to the relieved and thankful Property Manager, the GCM team began their weekends.

Jim stayed on site long enough to make sure there were no issues.

In less than 24 hours, GCM had assessed the situation, come up with a solution, rallied the team, and resolved the problem. By 6am on Saturday the building had full hot water capacity, just in time for homeowners to wake up to hot showers—some not even knowing what had happened.



*"Just another day in the life of a Gittleman Construction & Maintenance plumber!"*

*—Peter Ralph, Director of Maintenance Operations*

**GITTLEMAN**

This type of innovative approach is made possible by the experience Gittleman Construction & Maintenance has gained serving the Twin Cities condominium and townhome market in maintenance, construction, insurance restoration, and capital replacement projects.

Gittleman Construction & Maintenance Corporation is an affiliate of FirstService Residential Minnesota, Inc.

# Our Social Purpose

## Best Christmas Ever

Social engagement and action in the communities we serve is a high priority for FirstService Residential. We continue to explore ways to increase our efforts and positive impact. Here's one way we celebrate giving over the Holidays at FirstService Residential.

For the third year in a row, the FirstService Residential Minnesota Team has been supporting the Best Christmas Ever. This local non-profit organization blesses families with gifts who are in the midst of crisis during the holiday season.

### Best Christmas Ever brings Hope

This Christmas we will be surprising another local family with meaningful gifts that are specially selected for each member of the family. Look for their story in an upcoming newsletter.

Other Best Christmas Ever recipients we have surprised are Grant, a brave four-year-old boy who is battling cancer; three children who lost their mother in a car accident who are now living with their grandparents; and Aliyah, a bullied eighteen year old who became hospitalized and dropped out of school.

*"Surprising these families with holiday gifts and seeing their responses are too beautiful to put into words!" says Melissa Manning, FirstService Residential Association Manager and Best Christmas Ever Coordinator.*

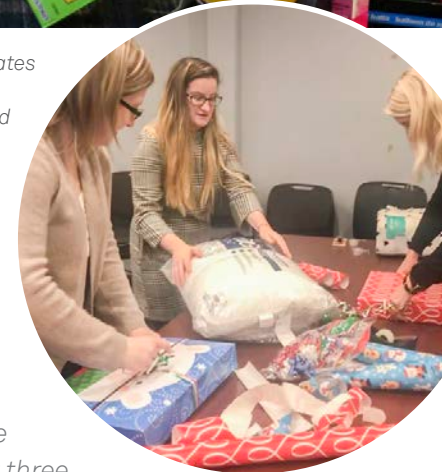
Grant's mother was so touched with hope and encouragement that she became a Best Christmas Ever captain herself to bless another family in need. Milly, the care-giving grandmother of three children, tearfully say, "I cannot thank you enough." And Aliyah gave us a hug because the gifts helped her persevere. Once a drop out, now Aliyah is taking on-line college courses!

Combining the efforts of FirstService Residential Minnesota and Planet Fitness of Minnesota, we have raised over \$28,000 to encourage local families facing crisis the last three years with the Best Christmas Ever.



FirstService Residential associates purchased gifts for two great holiday causes: Toys for Tots and the Best Christmas Ever.

Associates wrapping gifts for a family facing crisis this holiday season.



Thank you to Melissa Manning, FirstService Residential Transition Manager for coordinating the Best Christmas Ever the last three years. If you or your community would like to participate, visit: [www.BCEmovement.org](http://www.BCEmovement.org).



### Toys for Tots

Another way FirstService Residential Minnesota likes to celebrate the season of giving is by participating in Toys for Tots gift drive. This marks our 13th year donating new unwrapped toys for infants, children, and teens who would normally go without. It's one small way to brighten a child's holiday season.

Special thanks to Association Manager Colleen Nesseth for coordinating the FirstService Residential Toys for Tots gift drive for the 13th year.

Learn more about FirstService Residential #FirstServeOthers by visiting [www.oursocialpurpose.com](http://www.oursocialpurpose.com)



## TEAM SPOTLIGHT: Accounts Payable

This issue of Community Connections we go behind the scenes to the Accounts Payable Team supervised by Nicole Gossman. This Team of hard working FirstService Residential Associates serves our urban and suburban clients of Minnesota.

*“We work with Vendors and Association Managers to ensure all invoices are paid promptly,” says Nicole. “The team also troubleshoots and researches outstanding invoices.”*

These detail-oriented and accurate professionals take great pride in ensuring that all Association Managers are able to use AvidXchange—our paperless Accounts Payable Invoices

system—to view and approve invoice and payment detail. The Team also works with Vendors to ensure that they follow the AvidXchange billing guidelines to confirm invoices for timely payment.

For 2019, the Accounts Payable Team has been striving to increase efficiencies, minimize vendor invoice exceptions, and ensure all vendor checks are issued in a timely manner.

### ACCOUNTS PAYABLE TEAM

Vice President of Finance:  
Tammy Johnson, CPA, MBA

Accounts Payable Supervisor:  
Nicole Gossman

Accounts Payable Research Analysis:  
Brandon Kubitz

Avid System Admin:  
Shawn Melanson (Not pictured)

Accounts Payable  
Research Coordinators:

Kennedy Erickson  
Sheena Prindle  
Justin Pisarcik  
Steph Kubitz  
Roseanna Johnson (Not Pictured)

Vendor Management Agent:  
Nicky McClish  
Tammy Culligan

*Did you know?*

### THE ACCOUNTS PAYABLE TEAM:

- Emails an average of 7,000 Minnesota invoices through AvidXchange to be indexed and reviewed by Association Managers
- Mails 6,000 Minnesota invoices to the AvidXchange PO BOX each month
- Pays around 13,000 Minnesota invoices monthly
- Issues 2,300 Minnesota 1099's each year

# Did You Know?

## Preventing Christmas Tree Fires

“Fill the base of your tree stand with fresh water every day to help your tree hold its needles longer through the holiday.”

—Peter Ralph  
Director of Maintenance  
Gittleman Construction &  
Maintenance Corporation

Did you know that dry trees, electrical lights, and nearby heat sources like fireplaces, radiators, wood stoves or candles are the main causes of Christmas tree fires? Tree fires can fill a room with heavy, black smoke in under 30 seconds, making it nearly impossible for occupants to see, breathe or escape.

According to the National Fire Protection Association, over 200 fires per year involve Christmas trees, causing over \$15 million of property damage. Sadly, one out of every 34 Christmas tree fires results in death.

### Use these tips to stay safe with your tree:

- Choose a tree with fresh, green needles that do not fall off when touched
- Cut two inches from the base of the trunk before placing it in the stand
- Make sure the tree does not block an exit
- Check light strings for worn or broken cords before placing on the tree
- Turn off tree lights before leaving the house or going to bed
- Keep live trees well-watered
- Dispose of trees before they dry out; do not store dry trees inside a home or garage



Since 1998, FirstService Financial has been providing best-in-class financial services for condominiums, cooperatives, homeowner associations and commercial properties managed by FirstService Residential. We stand apart by combining the capital markets and treasury management expertise of a bank with a rare and in-depth understanding of real estate and insurance fundamentals. Our broad knowledge base allows us to create meaningful value for our clients through advisory services, individually tailored financial solutions, and insurance product offerings that set the industry standard.

Our experience is our clients' resource—an experience that has strengthened our credibility and the relationships we enjoy with our partners. It allows us to leverage our pricing and to access capital and insurance markets both domestically and internationally.

FirstService Financial and FS Insurance Brokers are affiliates of FirstService Residential and subsidiaries of FirstService Corporation. All our programs are created for FirstService Residential clients and are optional; however, many FirstService Residential clients participate because of their added value.

### Learn about FirstService Financial»



**FirstService  
Financial**

DISCLAIMER: All information provided by FS Insurance Brokers is advisory in nature. Any such information may not identify or contemplate all unsafe conditions; others may exist. FS Insurance Brokers does not imply, guarantee or warrant the safety of any of the client's properties or operations or that the client or any such properties or operations follow all federal, provincial, or local laws, codes, statutes, ordinances, standards or recommendations. All decisions in connection with the implementation, if any, of any of FS Insurance Brokers' advice or recommendations shall be the sole responsibility of, and made by, the client or other recipient of the information.

## Welcome New Clients

2019 has been an exciting year of growth for our organization. We extended a warm welcome to the **34 new communities**, over 3,600 units, that joined the FirstService Residential family this year.

### Welcome to the new associations who joined FirstService Residential this quarter:

#### Bellante

Midland Grove Condominium Association

Black Forest Condominium Association

Cloud 9 Sky Flats

Roundstone at Evermoor Condo Association

Mitchell Village Coach Homes

Nottingham Meadows

Brentwood Hills Villas

Sexton Lofts Parking Association

Village at Cologne 17th Addition

The Williamsburg Green Condominium  
Townhouses Association

Cambridge Park Townhomes Association

Ridgeview Homeowners Association

Marsh Creek Neighborhood

## Certifications

FirstService Residential Minnesota has 30 Association Managers with their CMCA certification, 37 with their Association Manager Specialist AMS designation, and 4 with their PCAM designation—the highest in the Twin Cities marketplace.

### Congratulations to our Associates who earned the Certifications this quarter:

Annika Christensen – CMCA

Aaron VanBrunt – CMCA

Lo McDonald – CMCA

Nicole Orfei – CMCA

Kim Schlauderaff – CMCA

David Schultz – M100

Mark Radmacher – M100

Jennifer Klein – M100

Jess Weisman – M100

## Welcome Back!



Cloud9 Sky Flats



Heatherton Condominiums



Midland Grove  
Condominium Association



Black Forest  
Condominium Association

The Professional Community Association Manager (PCAM) Certification is the highest professional recognition available nationwide to managers who specialize in community association management.

PCAM is recommended for experienced managers who want to demonstrate advanced skills and knowledge and who wish to be recognized as one of the best and most experienced managers in the nation.

The Association Management Specialist (AMS) is the second level of professional certification for Community Association Managers seeking to increase their knowledge and expertise.

Certified Manager of Community Association (CMCA) is the first level of professional certification for Association Managers.

# Wishing You and Yours a Happy Holiday Season!



## MY FAVORITE HOLIDAY GIFT GROWING UP..

“Legos. Loved building things.”

–Mark Gittleman, President

“Monopoly. I became a real estate baron at a young age.”

–Andy Gittleman  
Executive Vice President

“Mattel’s Electronic Football. What else were kids to do before the Internet and Xbox?”

–Mike Laukka  
Senior Vice President

“Dolls...I loved to dress them, bundle them and take them for walks in strollers and buggies.”

–Tammy Johnson,  
Vice President, Finance

“A dart board. Still play darts with friends and family on nights out or at home.”

–Shaun Zavadsky, Vice President,  
Community Management

“A doll and a cradle when I was 5. I finally felt like someone else in the family was younger than me!”

–Sally Andrist  
Director of Human Resources



**FirstService Residential**  
Over 80-years of Minnesota property management experience.

Our team is committed to serving your association with excellence, striving to enhance your property values and enrich the lifestyle of your residents.

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