

The MONTEBELLO Voice

an independent gazette

election extra

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How do you define what Montebello is and what it aspires to be? Please describe your views on our sense of community.

I define Montebello to be a home to retreat to in order to find peace and serenity surrounded by the joys of nature, as well as a place to enjoy the company of others and to participate in the many activities available. The way we have taken care of the woodlands accentuates the outer beauty of Montebello. Our community has a plethora of amenities for residents to use and various activities for residents to take part in. With a “premier” or “luxury” community comes great responsibility, and we need to make sure that we always live up to our vision.

What are your financial priorities for the association? How will you keep condo fees in check?

My financial priorities for the Association stem directly from the fact that I am highly accustomed to saving money to withstand any future expenses that could arise unexpectedly. Given the fact that the Federal Reserve has raised interest rates, I would continue my focus on helping properly ladder our money in investments that are protected, as evidenced by the decision to create a ladder of 10 CDs totaling approximately \$2 million in January 2023. This and other best financial practices must always be followed.

Regarding the spending side, we need to spend responsibly, making absolutely sure that items that pertain to the safety of residents are highly prioritized.

Regarding contracts, if we choose the cheapest contractor, we might not get a quality product and then we would have to spend more money to fix the product to fit the needs of the residents. If we have a contractor that has proven themselves by doing quality work, we should not necessarily take a risk with another unknown contractor lest we find the work unsatisfactory and then need to spend extra money to get what we originally wanted.

Montebello has a reserve budget, which fluctuates year by year based on various priorities and the information in the reserve study, which is an approximate schedule of maintenance and replacement work to be done. Through surveys



and focus groups, we can determine what other “wants” are of interest to residents, that might enhance life at Montebello — and increase owner equity.

In what community activities – events, clubs, committees – do you take part?

I was the Chair of the Finance and Budget Committee for five years, stepping down upon my election to the Board as required. I have also served as Vice Chair of Activities Committee and was a member of the Quality Improvement Committee. My statistical background is an asset in designing and analyzing data.

During my time as Chair of the Finance and Budget Committee, I served as the first check and balance for the budget process to ensure everything flowed as smoothly as possible. I advised various Treasurers and Assistant Treasurers as to how the committee functions as well as any issues that could arise so we could overcome them together. On Activities, I made sure that annual funding was adequate to offer various activities to residents. I also have served as a presenter for the Speaker Series on several occasions. On Quality Improvement, I help ensure that proper meaning in various administrative resolutions is kept intact and that

outdated procedures are made current. In the past I have attended all but two Board meetings, including every Board meeting since joining the Board in March 2022.

Please list some of your accomplishments as an incumbent or former board member.

Upon my election to the Board last year, I was selected to be Treasurer. Here are some of my major accomplishments:

- Worked with the General Manager to formulate and enact the Operating Budget, Reserve Budget, and Fee Schedule for the 2023 budget year.
- Laddered \$2 million into 10 federally insured CDs to take advantage of rising interest rates, earning additional income for Montebello.
- Served as Board liaison to the Finance and Budget (F&B) Committee.
Communicated our solid financial standing at monthly Board meetings.
- I led the process for achieving a minimal 3.5% condominium fee increase against an inflation rate past double that (above 7%).

With your continued support, even more can be accomplished!

As a board member, how open would you be to opinions and feedback from the residents?

As an incumbent Board member up for re-election, I have found it imperative to listen to what residents have to say about the projects the Board chooses to pursue. I always use such feedback to make truly informed decisions in voting for or against a particular project, in addition to my own personal research and analysis. I use opinions and feedback from the residents to continually improve as a Board member. It is very important to keep the lines of communication open as I see residents and owners as partners in making the best decisions possible for the good of the community. This in turns strengthens our standing as “premier,” which helps us continue to attract new owners who want to enjoy living here the way current residents do.

What three things are not working well at Montebello and what specifically would you propose (and fight for) as a board member to fix them?

The single biggest thing that is not working well at Montebello is the severe lack of community attendance at and participation in Board meetings. Individuals who do not attend meetings are not truly informed as to what is going on at Montebello. These individuals give up the opportunity to interact directly with the Board and instead rely on word of mouth from other residents. This often creates miscommunication issues or misunderstandings.

How would you deal with the problem of cost overruns in contracting and how should the board inform owners of these financial matters that affect owners' equity?

Cost overruns on contracts are rare, and usually relate to contracts with unknown issues that only become clear once the contracted work is underway. All expenses, contract and otherwise, are reported at Board meetings in the monthly operating budget financial report and the quarterly reserve fund report. These reports keep owners informed of financial status.

What specific steps would you take to improve transparency of information and decisions at Montebello to hold the board members accountable for their actions?

All Board decisions are made in open session, and all owners can participate at work sessions and Board meetings. If there appears to be a lack of transparency, it is because owners do not attend the meetings or read the meeting summaries that are sent out by MML or read the official meeting minutes. There also needs to be a stronger committee member presence, which can be handled by trying to reach out to new owners, and encouraging them to attend committee meetings, or hopefully become members themselves.

How do you differentiate between the role of management and the role of the board of directors?

The legal structure calls for a governing body that develops rules and regulations that adhere to the Virginia Condominium Act. This body is called the Board of Directors. The Board of Directors hires a General Manager to enact these rules and regulations. That person hires additional staff members to assist in association operations. This is how the roles differentiate between management and the Board of Directors.

Have you read the Virginia Condo Act?

I have read the Virginia Condo Act and use it to make informed decisions for the overall good of the community. It is important for Board members to know that, under the terms of the VCA, it is a key responsibility of the Board that we at least maintain, and hopefully improve, owner equity. 🏡

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In the spring of 2013, we sold our long-time home in the City of Alexandria. Our Real Estate agent brought us to Montebello and told us this was the only place she thought we should consider buying. Driving up long Mount Eagle Drive through the budding trees we knew we were home.

How do you define what Montebello is and what it aspires to be? Please describe your views on our sense of community.

Montebello is home! So many things to do, so many conveniences, so many opportunities to be part of the community, so many activities to be part of and make new friends.

What are your financial priorities for the association? How will you keep condo fees in check?

I believe in conservative financial planning. As expenses rise, condo fees will generally need to rise as well. However, with careful planning it is possible to keep those increases to a minimum. This past year, Montebello managed to keep the condo fee increase to less than half of the rate of inflation. It is important for all owners to attend Board Meetings to understand what and why financial decisions are made, especially when the budget for the next year is presented.

What community activities – events, clubs, committees – do you take part in?

I regularly am part of Water Aerobics, attending 3 times a week. I am a past Board member, having served 2 one-year terms. I am currently a member of the Finance and Budget Committee, the Quality Improvement Committee, and the Coronavirus Work Group. Prior to serving on the Board I was on the Elections Committee. I was also on various committees that helped plan the Community Center renovation.

As a Board member, how open would you be to opinions and feedback from the residents?

I am always open to hearing opinions and ideas from residents and friends even when they differ from my ideas. I believe that this is what it means to live in community!

How would you deal with the problems of cost overruns in contracting and how should the Board inform owners of these financial matters that affect owner's equity?



The reality is unexpected overruns will happen. Unexpected issues are found during any project, which is why each budget has a cushion included in it. The most recent example of this is a bridge on the walking trail that was found to be unsafe and closed and replaced. This was openly discussed during the Board Meeting after the General Manager learned about it from the trail company. In this particular case, not replacing an unsafe bridge was simply not an option. But as with all repairs, replacements, and other contracted services, the matter was discussed in an open Board meeting that all owners were able to attend and participate in. Our trails through the woods are one of our treasures that attract new buyers and renters and hence increase our equity.

What specific steps would you take to improve transparency of information and decisions at Montebello to hold the Board members accountable for their actions?

Decisions at Montebello (other than personnel and legal matters) are always made in an open forum. Each month the Board holds a Work Session to review matters that need to be addressed (governance, maintenance, committee requests, etc.). At the Work Session, the Board decides whether to move each matter forward to the next monthly Board meeting for a vote, or whether further information is needed. At the monthly Board meeting, formal, open votes are taken on all agenda items. All owners are invited and

encouraged to attend both the Work Sessions and the Board meetings. These are two opportunities every single month for owners to find out what is going on at Montebello and to make their voices heard. In addition to commenting or asking questions on agenda items, owners may also address any other topics at the Owners Forum that takes place at the end of both the Work Sessions and Board meetings. I encourage all residents to attend and learn and ask questions. For those unable to attend, a summary of each meeting is sent out by e-mail a few days after the meeting, and the official minutes, once approved, are available on BuildingLink.

How do you differentiate between the role of Management and the role of the Board of Directors?

The role of Management is to oversee the day to day operations of Montebello. The General Manager is responsible for hiring qualified staff, firing unqualified staff, finding companies who are interested in contracting to do work at Montebello and presenting their proposed contracts to the Board. He oversees all functions of Montebello staff and contractors. The Board of Directors establishes policies that are carried out by Management, and major financial expenditures must be approved by the Board.

As a former member of the Board of Directors I have read the Virginia Condo Act. 📖

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Thank you for the opportunity to provide readers of *The Voice* answers to questions that will provide additional information to what has already been made available. I urge your readers to consider the answers to these questions, along with my Bio and my Campaign Statement, which you have received and which have been posted in the lobby of each building. Make your decision on who to vote for based on a candidate's past job experience, past level of responsibilities, education and knowledge of Montebello's finances. These are important factors you should consider.

How do you define what Montebello is and what it aspires to be? Please describe your views on our sense of community.

Montebello is a long-time home for the majority of our residents. It is a home surrounded by a multitude of activities, activities that residents can choose from that provide enjoyment to them and enrich their lives. For some others, Montebello is a stopping-off point in their lives, a temporary oasis filled with all manner of interesting things to do.

It is a place where new friends are made. Friends that can fill a void for those in need of new friends or just casual acquaintances. It is a place of quiet, surrounded by our woodlands and walking trails. It is a place that all of us love and cherish

Montebello aspires to continue to be one of the premier condo complexes in Fairfax County and the surrounding area. My first-hand experience as Chair of the Finance and Budget Committee has shown me how seriously Montebello's board looks at both maintaining and improving our way of life. Our Board is not frivolous with our money. It considers every expenditure for its benefits and its cost effectiveness. It challenges management to find the best use of our money.

Our woodlands, our walking trails, our year-round swimming pools, our new Community Center, etc., all contribute to making us a model condo complex. My wife and I have immersed ourselves into Montebello's community. We are part of the multitude of caring people here who work so hard in so many different ways to nourish and strengthen our sense of community. We should all be proud to be a part of the wonderful sense of community we have here at Montebello. A place for all.

If I am elected to the Board, I assure you I will do everything I can to continue to make Montebello such a great place to live. A place that will continue to stand tall and continue to be a model for others.



What are your financial priorities for the association? How will you keep condo fees in check?

Simply put, my financial priorities are to balance our expenditures versus the revenues we are able to reasonably accrue. We are an aging complex that this Board and past Boards have kept in excellent condition. Future Boards must do the same. We must be pro-active in caring for our buildings, our equipment and our fixed assets. We have the professional/technical staff to be able to do that. Keeping our assets in top notch shape will extend their life span and result in lower total replacement costs.

We need to keep our payroll at budget. But we must budget such that we can provide our employees a fair, competitive wage, based on the cost of living in the DC/VA/MD area. We have excellent, experienced employees at Montebello. We don't want to lose them.

It is easy to say we can raise condo fees to balance our budget and spend whatever we want. **BUT WE CANNOT LET THIS HAPPEN!** This year we were able to keep condo fees at a 3.5% increase, when inflation was at a 7+% increase. Thanks to management, the Finance and Budget Committee, and the Board for their review, recommendations and approval of the budget.

To the best of my knowledge, Montebello has never had a "special assessment" for residents to supplement our overall revenues. We must manage to the budget and not

spend money outside of the budget in a given year, except in emergency situations. I am against special assessments here at Montebello.

That brings us to the question of our Reserves. It is impossible for you or me to know exactly how much we should have in our Reserves. But we have had professionals review our buildings and our fixed assets every few years and they have estimated that we should have a \$5 Million line item in our budget for Reserves. The Board will continue to have experts re-inspect our fixed plant and equipment and verify that the amount we have in reserve is adequate.

In sum, I will ensure condo fees are kept in check by working with management and other board members to ensure we are cost conscience in the ways discussed above, and in many other ways. My main financial priority is a balanced budget, without unnecessarily burdening our residents with excessive condo fees.

In what community activities – events, clubs, committees – do you take part?

I have been very active in the community since coming to Montebello. About 2 months after I arrived, I was asked to be a member of the Montebello Coronavirus Committee. It has been very rewarding and the committee has been responsible for ameliorating the spread of the virus here at Montebello.

I have also been a member of and the Chair of the Montebello Finance and Budget Committee. As Chair, I led the committee through the review and subsequent recommendation of approval to the Board of Directors of our current 2023 budget. My thanks to the committee members for their hard work during the entire past year. I know our finances well.

I joined the Neighborhood Improvement Committee because wherever my career has taken me, I have made it a priority to be involved in community activities. This allows me to learn local community interests and to pass Montebello interests on to them.

My wife and I have been involved with the recent establishment of a Parkinson's/Caregivers Support Group. The program has thus far proved to be beneficial to several of our residents who are caring for family or friends with Parkinson's Disease. We also participate in the Great Decisions program, a nonpartisan discussion group of topics that cover relevant foreign policy issues.

On a lighter note, I participate in water aerobics, listen to speakers from our Speakers Series and enjoy the many events in our Community Center. And this year I taught a beginner Italian class to some interested students, for their fun and mine.

Please list some of your accomplishments as an incumbent or former board member.

I am not an incumbent or former board member here at Montebello. However, I have a strong desire to be a new board member because I know I can make positive contributions to our Montebello community. I have held significant business and management positions in my career, culminating with 5 years as D.C. Medicaid Director, managing a \$2.1 Billion health care program serving over 200,000 D.C. residents.

I am knowledgeable of the responsibilities of board members. I have served on many boards, both at the community level and the National level. At the National level, I served as a member and Chair of the Maternal and Child Health Governing Council of the American Hospital Association (AHA) for 3 years. We set national health care policies for Maternal and Pediatric healthcare in the U.S. I also served in the AHA House of Delegates.

As a board member, how open would you be to opinions and feedback from the residents?

Communication between residents and board members is at the top of my agenda. Please take the time to read my Campaign Statement. It reads in part: "Board members are directly responsible to the Montebello unit owners who elected them. As a Board member, I will always remember that I work for you, the unit owners of the Montebello Community. Your views, needs, and interests will be paramount in how I carry out my Board responsibilities.

To represent the views, needs, and interests of the Montebello community, Board members need to continue to sustain communication with community members. And owners and residents must take the initiative to openly communicate with the Board members.

I would urge you to listen to the Zoom broadcasts of Board meetings and Board work sessions. This is the best way to know first-hand what is happening.

I pledge to have open communication with you."

What three things are not working well at Montebello and what specifically would you propose (and fight for) as a board member to fix them?

My observation as a resident is that things are working well. Could some things work better? Probably. Residents should be proactive and let the Board know what needs to be tweaked. I'm sure some of you may have concerns about specific things. If so, you should let the Board know so that these can be discussed. I would be happy to discuss such issues if elected to the Board.

How would you deal with the problem of cost overruns in contracting and how should the board inform owners of these financial matters that affect owners' equity?

Again, I would urge residents to listen on Zoom to the Board meetings and work sessions as they occur to hear first-hand what is going on. Also, there is an email summary sent out after every meeting that residents can read. Or third, ask our manager, Eric Finke, about any contract at his open meeting for residents. Management, not the Board, is responsible for contract negotiation and oversight.

What specific steps would you take to improve transparency of information and decisions at Montebello to hold the board members accountable for their actions?

Any time the Board makes a decision on a matter, it must be done in open session by vote. Neither the Chair nor any board member can make a decision for the entire Board. All Board decisions are made in the Open Session of the Board Meeting.

The only topics discussed in a closed Executive Session are legal issues, personnel issues, and occasionally some contracts. And remember, residents can listen to the open session of every meeting.

How do you differentiate between the role of management and the role of the board of directors?

The board of directors is our governing body. It oversees our association's activities, like finances, hiring the CEO, etc. It sets policy for the association and it can set goals and drives the overall strategy.

Management enforces policies made by the Board. Management runs Montebello on a day-to-day basis. It handles security, engineering, housekeeping, administration, front gate, etc., everything that affects our residents' lives here at Montebello.

Have you read the Virginia Condo Act?

Yes, I have! 📖

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How do you define what Montebello is and what it aspires to be? Please describe your views on our sense of community?

I think of Montebello principally as home. We have many advantages compared to other Associations in our area. Chief among these are our Community Center, our wooded Grounds and our active and friendly Community. We need to maintain the excellence of our Community. We also have many long-term residents and Owners in our Association. They should not find our Condo Fees so steep that they can not afford to continue living here. So, when I think about what we should aspire to be, I think: Maintain and Improve the Quality of Life here at Montebello and keep it Affordable by spending our money wisely.

What are your financial priorities for the association? How will you keep condo fees in check?

A. My first financial priority is to keep the facilities and grounds in good repair. It is a false economy to forego or defer proper maintenance and repair (or replacement) of our infrastructure. Several studies have shown that deferring maintenance, repairs and replacements will result in significantly higher costs. (Those studies indicate that costs will triple without timely action.)

B. My second financial priority is to keep the Associations finances in excellent condition. Clearly it is possible to run financial risks to keep Condo Fees low. But, like deferred repairs this frequently results in worse outcomes.

C. My third financial priority is to keep Montebello affordable for our residents, i.e., to keep our Condo Fees as low as possible consistent with achieving the first two priorities.

D. My final financial priority is to ensure that all of the Owners have a voice in approving any significant improvements or changes to our campus. The Owners are paying the bills. They should be consulted before we initiate significant changes or improvements.

In what community activities – events, clubs, committees – do you take part?

I am the Chair of the Montebello Chess Club and a member of the Finance and Budget Committee. Although not an organized activity, I make frequent use of the gym and have made several friends through that activity. Earlier I served as a member of the Board of Directors and as the Assistant Treasurer.



Please list some of your accomplishments as an incumbent or former board member.

I was Assistant Treasurer from 2021-2022. In that role, I supported development of the 2022 budget including a review of suggested cost savings proposals.

When I first joined the Board of Directors, the Association was reviewing new legal requirements for Electric Vehicle (EV) Charging Stations and a proposal to implement them on our property. I did an extensive review of EV Charging Stations including the number of EVs we had on the property, the availability and characteristics of Charging Stations in our area, the costs of using those stations, and the technical developments and limitations of Charging Stations. As a result of this research we were able to reduce the number of Charging Stations we initially purchased from six to two, saving approximately \$60,000 and bringing the expense under the anticipated reimbursement ceiling. By building out connections for two more charging stations we also arranged for flexibility to expand the number of charging stations (if usage requires) and to adopt improved Charging Station technology should that later become available.

Because of the Surfside, Florida building collapse I became interested in structural concerns for buildings such as ours. I attended several classes on the recommended

inspection processes. To ensure that our buildings remained safe, I successfully argued for Structural Inspections of our buildings to coincide with the 2022 Reserve Study.

In addition, as part of my role as Assistant Treasurer I initiated “Should Cost” analysis of contracts coming to the Board for a vote. This allowed the Board to understand if we were getting an acceptable deal on our contracts. As an extension of this process, and at the request of Management after I left the Board, I found an additional bidder for the Bridge project. I arranged to have them bid on our Bridge project to ensure we got a good price from whichever contractor was chosen.

As a board member, how open would you be to opinions and feedback from the residents?

I think it is critically important for Board members to be open to the opinions and feedback from Owners and Residents. The Owners are paying the bills and should be consulted regularly, especially when we consider improvements to our facilities. Residents who are not Owners should also be heard. They are Tenants of our Owners. Their well-being and view our Association will influence the value of our property and the reputation of our Association.

What three things are not working well at Montebello and what specifically would you propose (and fight for) as a board member to fix them?

A. Owner Involvement in deciding on discretionary spending: For example, when we consider reserve projects we generally face a decision about whether or not to use the reserve project as an opportunity for optional improvements. We frequently assume that we should leverage the reserve project to significantly improve our facilities. So, where a Replacement would cost about \$1M, the Improved Version would frequently cost \$1.5M. A small group plans the reserve project and decides that the Improved Version is desired. The Owners, if they are consulted, are only offered a choice of doing the more expensive Improved Version and generally told that it must be done. What should happen instead, and what I as a Board member will try to achieve, is that the Owners should be offered both the Replacement option and the Improved Version option with appropriate cost projections for each, then offered the opportunity to vote for which they would prefer.

B. Developing projects without adequate provision for overruns. When we plan projects, we generally have a budget projection. However, we tend to plan our projects right up to the limit of the available funds without leaving an adequate buffer for unexpected costs. Our projects frequently come in 20% over budget. Since we’ve rarely provided an adequate buffer for unexpected expenses we are often faced with an overrun that requires us to defer other projects and/or squeeze operating costs. Ultimately this will result in increased condo fees or reductions in services. A better

practice is to scope projects to be 20% below the available budget so that when the overrun occurs we will still be within our budget. As a Board member I will attempt to implement this practice.

C. Failure to adequately include anticipated costs in discussions with Owners regarding projects. Frequently, when we approach the Owners about some Improvement or Project (for example, by conducting a survey) we will ask if they would like to have some Feature. But, we rarely tell them how much that Feature will cost. The implication is that the Feature is essentially free. But, it is not. In fact, the Owners are paying for it. So, the question that should be posed is, “Would you like to have the Feature at a cost of \$X?” The solution to this problem is to include costs in our surveys and discussions with the Owners. As a Board member I will try to see that cost discussions are implemented in our conversations with Owners.

How would you deal with the problem of cost overruns in contracting and how should the board inform owners of these financial matters that affect owners’ equity?

Over the last several years, our projects have tended to overrun by about 20%. As I outlined in my answer to Question 6B, I would reduce the scope of work on our projects, if necessary, so that a 20% overrun can be handled within the available budget. Should that not be practical, I would ensure the Board addresses how we would obtain those additional funds if the need arises. In many cases, it is important that the Contractor remain unaware of the availability of such funds. So, these should be held in a reserve that is not visible to the Contractor. If despite these precautions we should experience a breach of the budget, the Association retains operating reserves that can be used to keep our finances on track. Management also has a role to play. Frequently, stubborn negotiation and de-scoping of planned work can keep projects on financial track.

In some cases, a project may be able to be done well within the planned budget. In those cases, we should not add “nice to have” scope just to spend all of the budget. Instead, those remaining funds should be kept to pay for the overruns on other projects.

We already have adequate means of communication to inform the Owners. What we need to do better, is to make the content complete, relevant and transparent to the Owners. We should report regularly and individually on the status of our Reserve and Capital Improvement projects, their level of completion and cost status.

What specific steps would you take to improve transparency of information and decisions at Montebello to hold the board members accountable for their actions?

The steps I outlined in the Answer to Question 6, above will serve to address many of our transparency issues. We already have the communications channels established and available. It is the content of those communications that needs improvement.

In addition, decisions by the Board can be much better informed if the Board is provided with both the “pro” and “con” perspectives of the proposed action. Decisions are not well founded when only the proponents of the action are allowed to present to the Board.

As a Board member I will attempt to see these improvements implemented.

How do you differentiate between the role of management and the role of the board of directors?

Management is responsible for day-to-day operations and the execution of the policies and guidance established by the Board. The Board is responsible for general financial management, for providing policy and guidance to Management and for making critical decisions, especially financial decisions.

Have you read the Virginia Condo Act

Yes. Now twice. The first time when I joined the Board of Directors in 2021 and the second time recently in preparation for this Election. In addition, I consult it as a reference whenever an appropriate subject comes up. I think it is important for Board members to know the basic references themselves. That allows them to better evaluate others’ interpretations. 📖