

The **MONTABELLO** Voice

an independent gazette

election extra

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Transparency and inclusiveness with unit owners and renters – former board president, Greg Bender, had a practice of asking meeting attendees whether anyone had any questions or comments about each agenda item. People felt they were part of the decision-making process. The residents’ forum at the end of the meeting was open to all people, not just unit owners. Would you consider reinstating these practices at board meetings?

Yes, I am a huge fan of transparency and openness at Board meetings. From both a unit owner and Renter standpoint. Feedback from all residents is critical to decision-making. If elected, I would also advocate for holding Board meetings in the party rooms of each building on a rotating method.

Various marketing materials refer to Montebello as “premier” and “luxury.” 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 “master planned” community built by a renowned developer, Giuseppe Cecchi of the IDI Group. My grandparents lived in Cecchi’s first major development, the Watergate in DC. Montebello is a diversified community with major amenities unparalleled by most condominium developments in the NoVA region.

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

Every expenditure should have a costs vs. benefits analysis. I am also an advocate for any expense over \$30,000 to have a “recurring” annual operating estimate added to any proposal. Too many times our expenses are not vetted deeply and only the most expensive are authorized. We should have at least 3 proposals for an expenditure. If elected I would propose meeting agendas be released at least 1 week prior to any Board meeting. The current method of publishing the agenda late Friday afternoon prior to a weekend for a Tuesday meeting is not enough time.



How well do you work with other people, and do you consider yourself a “team player”? If so, please offer some examples.

I come from a family of 5 sisters and 4 brothers. I have always had to work with others to get along. Currently I have been President of the Virginia Wireless Association. The Association is a collection of 700 individuals and firms promoting wireless technology in the Commonwealth. Prior to my current position I worked for RE/MAX Allegiance in Fairfax County helping hundreds of individuals and families purchase and lease homes. I have always worked well with others!

Explain your understanding of the roles of management vis-à-vis the board. When do you believe owners should contact the board or management? Are you personally open to receiving emails directly from or meeting with residents?

I believe owners should always be able to contact Board members. I am willing to publicly give out my email and cell number in order to receive inquiries from both owners and renters in Montebello.

What is your take on our amenities spending? What new amenities would you add? Do you think amenities add to property values? As a board member, how would you solicit opinions for amenities you personally don't use?

Montebello has bountiful amenities, clubs and groups for all to partake. I am a fan of promoting the sport of pickleball and adding a movable/rolling basketball hoop on the existing tennis courts. My ideas would be on a very limited, set time schedule until enough feedback from the Community is analyzed and discussed.

We have a new general manager about to start his position here. What will you do to help ensure his success?

I will personally reach out to the new GM whether or not I am elected to the BOD. I would offer to walk with the new GM around our beautiful grounds and buildings and introduce him to my friends and neighbors. After the initial introduction I would convey my belief that the GM can contact me at any time for any reason.

Carol Campbell

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Transparency and inclusiveness with unit owners and renters – former board president, Greg Bender, had a practice of asking meeting attendees whether anyone had any questions or comments about each agenda item. People felt they were part of the decision-making process. The residents’ forum at the end of the meeting was open to all people, not just unit owners. Would you consider reinstating these practices at board meetings?

As the Community is comprised of both unit owners and renters, it only makes sense to let both have a voice at the meetings they are allowed to attend. It also adds to encouraging inclusiveness. Although renters do not have the same financial stake in property appreciation as the owners, I do believe they share the same objective of maintaining Montebello as a safe, affordable place to live. Listening to those that take the time to share their perspectives is an excellent way to stimulate productive conversations that address issues at hand. Voting would be limited to what is authorized in the covenants and by-laws.

Various marketing materials refer to Montebello as “premier” and “luxury.” How do you define what Montebello is and what it aspires to be? Please describe your views on our sense of community.

A marketing label has little value if the people in the community do not care or look out for each other – a strong characteristic of “sense of community.”

What is your take on our amenities spending? What new amenities would you add? Do you think amenities add to property values? As a board member, how would you solicit opinions for amenities you personally don’t use?

Any recommendations for new spending MUST be evaluated for affordability – not just the initial expense, but the long-term recurring costs. Too often a “good idea” is implemented without consideration of how to pay for the item in the future. For a complex the size of Montebello, sunk costs (maintenance of infrastructure, utilities, salary/benefits, fixed contracts, etc.) have to be evaluat-



ed with detailed justification and cost-benefit statements measured against anticipated revenues before a vote is taken. As a Board member, you should be willing to solicit opinions from the community, regardless if you personally used or did not use an amenity – your role on the Board is working on behalf of the community – not your personal interests.

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Transparency and inclusiveness with unit owners and renters – former board president, Greg Bender, had a practice of asking meeting attendees whether anyone had any questions or comments about each agenda item. People felt they were part of the decision-making process. The residents’ forum at the end of the meeting was open to all people, not just unit owners. Would you consider reinstating these practices at board meetings?

Reinstating the practice goes against the Virginia Condominium Act because in that act it explicitly states it must be an Owners’ Forum. Montebello needs to follow the law here. Non-owners have no standing when it comes to discussing budgetary, policy, and rule-making proposals. That said, there are ways to help resolve this issue. Community surveys, focus groups, and town hall meetings are open to all residents, and non-owners actively participate in the process. Additionally, committee chairs should allow all residents to comment on committee proceedings. If the issue involves budgets, rule-making, and policy issues, the renter always has the option of contacting the owner and request the owner forward comments to the board and/or management.

Various marketing materials refer to Montebello as “premier” and “luxury.” 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 place to retreat to in order to find peace and serenity surrounded by the joys of nature. The way we have taken care of the woodlands accentuate 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. If the residents want to keep this community upscale, we must maintain the premises for current and future generations. With a “premier” or “luxury” community comes great responsibility, and we need to make sure that we always live up to our vision. Some Capital Improvement Projects may be required; fortunately, most of these projects must be owner approved.



In what community activities – events, clubs, committees – do you take part? If not an incumbent or returning board member, how often did you attend board meetings?

I have found passion through my commitment to various committees I’m part of at Montebello. For instance, I am currently the Chair of the Finance and Budget Committee here at Montebello for the past five years, the Vice Chair of Activities Committee, and am a member of the Quality Improvement Committee. As Chair of the Finance and Budget Committee, I have served as the first check and balance for the budget process to ensure everything flows as smoothly as possible. I have 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. Regarding Activities, I have stood up to make sure that annual funding was adequate to offer various activities to its residents. I also have served as a presenter for the Speaker Series on several recent occasions. Regarding Quality Improvement, I have made sure that proper meaning in various administrative resolutions was kept intact and that outdated procedures were made current. My statistical background is an asset in designing and analyzing data. I have attended all except two Board meetings in the past, both due to sickness.

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 is about to start raising interest rates, at its March 16, 2022 meeting, I would focus on helping properly ladder our money in investments that are protected. This and other best financial practices must always be followed. Let's invest in our future and make it bright!

Regarding the spending side, we need to spend responsibly, making absolutely sure that items that pertain to the safety of residents is highly prioritized. For instance, we need to reconstruct the bridge behind Building 2 due to structural deficiencies that have been found. It's not enough to merely replace a few boards because if the incorrect boards are put in place, then Montebello has a probable lawsuit on its hands from a resident who gets hurt.

Montebello residents should know that 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. Why should we play the "stock market" with contracts? If we have a contractor that has proven themselves by doing quality work, we should not take a risk with another contractor lest we get ourselves into a financial mess.

Montebello has a reserve budget in place each year, which fluctuates based on various priorities. If the priorities are not being communicated out or there is a disconnect going on between the Board and residents, let's work together to find a new balance of priorities that can work for as many residents as possible, while being respectful of its impact on our financial situation, especially reserves and end of year equity! We need to work together, through proper surveys, focus groups, and more strong communication to discover what is a "need" and what is a "want" and focus heavily on the needs to at least maintain owner equity here at Montebello.

Does Montebello live up to its mission statement (below)? What can we do better?

"MCUOA's vision is to be premier desirable condominium association. MCUOA's values emphasize respect for others, neighborly cohesiveness, cultural sensitivity, age diversity, financial stability, and responsive, timely communications."

Montebello has done a good job regarding living up to most of its values, but I believe we can improve on civility and camaraderie. In my five years as a committee chair for Finance and Budget, I have seen the importance of creating an environment where we can have a collaborative discussion on matters before the committee. This led to the creation of the Finance and Budget Committee Rules of Civility.

How well do you work with other people, and do you consider yourself a "team player"? If so, please offer some examples.

I enjoy working with people. I follow structure to bring people to the table to ensure voices are heard in discussions of practical importance. In the Activities Committee, I have enjoyed taking part in brainstorming new activities our residents could enjoy. In the Finance and Budget Committee, I have enjoyed the challenge of helping develop a budget that meets the needs of our residents. The common thread here is that there is always a need to follow proper procedures to achieve common goals and I take delight in using Roberts Rules to make things happen.

What is more important for Montebello: increasing property values or affordability?

Both are equally important. It's always a challenge to balance increasing property values while keeping things affordable. In order for the buildings to maintain established values, we need to be competitive to bring in new residents.

Explain your understanding of the roles of management vis-à-vis the board. When do you believe owners should contact the board or management? Are you personally open to receiving emails directly from or meeting with residents?

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 Man-

ager to enact these rules and regulations. That person hires additional staff members to assist in association operations.

Whenever a renter faces issues, that person should contact the owner to help resolve the issues at hand. When an owner has an issue, they need to contact Management. If they do not have a resolution to the issue they should contact a Board member to help handle the final resolution of the issue. What is important here is that the roles of the Manager and the Board are not confused.

In our community, I would welcome hearing from residents, whether it be via e-mail, phone, in person, or even via Zoom.

What do you think about the current rules and policies of the Association? If you wanted to change any Association rule or amend the documents, what would these be, and what is your rationale?

The current rules and policies of the Association are meant to help protect owners' equity and interests. In my time as a member of the Quality Improvement Committee, I have enjoyed working with them to analyze and update various administrative resolutions to make them current and relevant. I support and respect the existing procedures in place to make this happen.

What is your take on our amenities spending? What new amenities would you add? Do you think amenities add to property values? As a board member, how would you solicit opinions for amenities you personally don't use?

We are a multi-amenity association. I think amenities that are already in place should be properly maintained and periodically reviewed in respect to our finances.

When new amenities are suggested in various forums, it is important that the suggested amenity serves a good purpose for a segment of our residents and is seen as a good capital improvement towards increasing our equity.

Amenities add to property values because they help Montebello to remain competitive and preserve owner equity.

Everything starts with cost. To solicit opinions for amenities, let's do surveys, focus groups, both of which currently happen, and add on strong communication to the community to make this happen.

We have a new general manager about to start his position here. What will you do to help ensure his success?

It is important to show respect to the role of the General Manager in relation to the Board of Directors and to help the new General Manager keep being transparent to the owners (trustees). I want to be available to encourage interaction with the General Manager to the Board of Directors.

Heather Click

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What will you do to help ensure the success of the new general manager?

The new GM has already met with the individual Board members, attended a Board meeting, conferred with management and staff, and begun familiarizing himself with Montebello's facilities, community and governance. He is doing everything he can to ensure his own success! He is an experienced professional who is well-equipped to successfully manage all aspects of condo operations. The best thing the Board can do is to allow him to perform his duties without interference. However, the Board and GM must have a good working relationship based on mutual trust and clear communication to ensure the success of the Association.

Please list some of your accomplishments as an incumbent Board member.

I consider as accomplishments the successful execution of my duties and responsibilities on the Board. As one of the four officers elected by Board members, in my role as **Secretary** I move the minutes, voting records and resolutions of the twice-monthly Board meetings through the time-consuming process of review, approval, signing and posting as well as creating the informational MML Update for residents and the Summary of Board Actions for the Times. I also serve as the **Chair of the Quality Improvement Committee** which meets monthly and is currently performing the ongoing review of Montebello's 170+ Administrative Resolutions. Residents are likely more familiar with the 30-Second Surveys which are generated by the QI Committee. I am the **Board Liaison to the Grounds Committee**, attending its monthly meetings and providing support and advice as needed. Additional activities have included the **Safe Streets Work Group** and the **Coronavirus Work Group** which met weekly at critical times and which continues to monitor conditions and provide guidance to keep Montebello residents and staff safe during the pandemic. But overall, my view is that the Montebello Board functions as a single body working through and with management; accomplishments belong to the Association rather than a single individual. A noteworthy accomplishment is the extensive planning and successful execution of the largest project ever undertaken at Montebello the much-anticipated renovation of the Community Center which reopens this spring. Other significant accomplishments of the Association include the



campus-wide installation of improved outdoor lighting, the modernization of the Fire Alarm system, installation of the digital communications network and FiOs, the erosion control and grounds restoration plan, and the current trail renovation. There are others, too numerous to mention, as Montebello is a dynamic and forward moving condominium association which I am proud to serve.

Define what Montebello is and what it aspires to be.

Montebello's spacious condominium units, remarkable architecture, extensive and unique amenities, and gated and wooded campus make it a "premier" or "luxury" condominium. Its size (1000+ homes), configuration (self-contained campus), amenities (including a community center) and many opportunities for social and cultural activities make it a community. Although the population is somewhat skewed to an older demographic as people age in place, the presence of younger working people and families enriches the community and brings an important range of perspectives and ideas. The Montebello community is vibrant and valued and is essential to the future of the Association.

How do our amenities fit into spending, property values, and future planning?

Montebello's wide-ranging amenities set it apart from other condominiums. The cost to maintain and operate our amenities is part of your condo fees. I do not know how much of our property values at Montebello depend on our many amenities, but I am confident that the qual-

ity of life and the sense of community would be negatively impacted by their absence. The addition of new amenities must be based on the best long-term interests of the Association and not simply in response to resident requests. The Board listens to owners and residents but ultimately has a fiduciary responsibility legal obligation to make decisions based on sound financial practices and the health and safety of its residents.

Are you a team player?

Yes. I am confident that if you inquire of anyone who attends the Board meetings, or the committees on which I serve they will confirm that I “work well with other people.” I would like to mention that I believe that working well with others as a member of a team requires having trust and confidence in the motives and abilities of those with whom you work.

How will you keep condo fees in check?

I am unsure how to interpret this question. Does “in check” mean no increase in condo fees? If so, that is not a feasible proposition. Montebello’s budget is not independent of the marketplace. We have contracts for goods and services, a staff of employees who tend to our facilities and requirements to maintain adequate re-

serve funds. Each year the GM, Treasurer and Finance & Budget Committee work tirelessly to put together a budget that meets the needs of Montebello without putting undue financial strain on the owners. That has been successfully accomplished since the beginning and Montebello remains on sound financial footing with an average condo fee increase of 3.95%. Current inflation rates may pose a challenge for future budgets, but be assured that we will work to minimize that impact on Montebello however possible.

When should owners contact Board members or management?

Day to day issues with facilities and services are the purview of management. There are procedures in place for communication of problems and concerns and our GM values and promotes customer service. Unresolved issues may be communicated to the Board. As a Board member I am always happy to speak with residents and owners.

Jon Kandel

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Transparency and inclusiveness with unit owners and renters – former board president, Greg Bender, had a practice of asking meeting attendees whether anyone had any questions or comments about each agenda item. People felt they were part of the decision-making process. The residents’ forum at the end of the meeting was open to all people, not just unit owners. Would you consider reinstating these practices at board meetings?

It’s not a matter of reinstatement. Comments during meetings are a victim of the change to virtual meetings due to COVID-19. Resident attendance at virtual Board meetings and work sessions has been minimal – usually just the residents who serve as Committee chairs. The change to virtual meetings has actually made it easier for people to make comments or ask questions, since all they need to do is raise their electronic hands to be recognized. And on a few occasions people have raised their hands and made comments. But with so few attendees, there have been few to no hands raised at most of the meetings. Once we resume in-person meetings, the number of attendees – and presumably the number of comments and questions – will likely increase.

The forum after the Board meeting is an Owners’ Forum by legal definition, though a renter might comment because we don’t screen people’s status as to who is or is not an owner prior to letting them speak.

Various marketing materials refer to Montebello as “premier” and “luxury.” How do you define what Montebello is and what it aspires to be? Please describe your views on our sense of community.

The 1980 Public Offering Statement established Montebello as a luxury condominium matching the best private homes in Alexandria. I believe that Montebello is still a luxury condo. We have amenities that match or exceed almost all of the condos in the area, including new condos. Montebello is the only condo in the Commonwealth of Virginia with a full-service restaurant. We have a beautiful developed landscape and, of course, are unique in having the woodlands. QI surveys show that 93% of residents would recommend Montebello to a prospective buyer or renter. There is a strong sense of community and camaraderie among our residents, as evidenced, for example, by the implementation and success of the Neighbors Helping Neighbors program initiated at the onset of the pandemic.



In what community activities – events, clubs, committees – do you take part? If not an incumbent or returning board member, how often did you attend board meetings?

The pandemic shut down almost all activities and clubs. I am active with the Times of Montebello, shooting photographs on request; and Art in Montebello, where three years ago I mounted a solo photo show and will do so again with the re-opening of the Community Center. In the past I have attended occasional Grounds Committee, Activities Committee, and Finance & Budget Committee meetings. On several occasions I have been invited to speak at the Montebello Discussion Group events. I have presented to the Travel Club twice. I am a regular at the Saturday morning Meet Your Neighbors Zoom, and pre-pandemic attended every Cup of Joe, where I met with residents old and new – and often came away with topics on which to follow up. I attend most major Activities Committee events, and have in the past called the Montebello Bingo games, filling in for Ruth Hieneman. I am currently doing that again.

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

We are at the end of a ten-year period of major rebuilding, having spent about \$16 million to upgrade systems and structures that have not been updated in 25 to 40 years. In the past five years the condo fee increase has averaged 4.07%, just fractionally above the Montebello 40-year average of 3.95%. Through good planning, in the past decade we raised \$16 million while keeping the condo fee increase about at the 40-year average! Condo trade associations and accountants, nationwide, recommend an average condo fee increase of between 4% and 4.5%. Our average is at the bottom end of that range, and I believe that going forward we can stay at an increase of 4% or below – and we will not need a special assessment, as suggested by others.

Does Montebello live up to its mission statement (below)? What can we do better?

“MCUOA’s vision is to be premier desirable condominium association. MCUOA’s values emphasize respect for others, neighborly cohesiveness, cultural sensitivity, age diversity, financial stability, and responsive, timely communications.”

Yes. Are we perfect? No. Is there room for improvement? Always. But Montebello is a great place to live, with great people and sound finances.

How well do you work with other people, and do you consider yourself a “team player”? If so, please offer some examples.

I support the Montebello system where committees are the lifeblood of ideas and potential projects. I have collaborated with the Grounds Committee and the Activities Committee, serving as a sounding board for their ideas and collaborating on projects or events that move ahead. Some of the articles I have written for Times of Montebello were at its suggestion. I work well with Montebello staff and employees as exemplified by updating the Emergency Preparedness Manual and developing COVID protocols, and I have participated in certain emergency situations.

It is imperative that Board members listen to and trust Management and the outside experts – that’s part of the Board orientation – because Board members are rarely expert in the specific topics under Board consideration.

What is more important for Montebello: increasing property values or affordability?

Those two are not mutually exclusive; it is not an either/or. It would be nice if the condo fee never went up, but costs increase an average of 2.5%–3.0% each year just for operational expenses, and additional money, about 1.0%–1.5%, needs to be collected for maintenance or replacement of structures, equipment, and systems listed in the Reserve Schedule.

Keeping the condo fee increase in line with Montebello’s 40-year average while raising money for reserve projects is an achievement of which I am most proud. Maintaining or increasing value is a legally-defined responsibility of the Board. The enhancements made to the property, while maintaining the 40-year average condo fee increase, have in recent years raised ownership value as indicated by unit sale prices. Ownership agrees with new capital improvement proposals, having voted overwhelmingly to build the Fitness Center and for the capital improvements that are a minor part of the Community Center Renovation.

All of these improvements benefit the residents who live here today and the owners who sell tomorrow – unit sale prices have never been better. In 2021 seven tiers set record sale prices. Montebello also works hard to control costs. The Operating Budget is scrubbed by multiple entities before it is presented to the Board. Montebello does face some expense challenges, notably the pay scales for our employees where we must remain competitive to avoid losing staff.

Explain your understanding of the roles of management vis-à-vis the board. When do you believe owners should contact the board or management? Are you personally open to receiving emails directly from or meeting with residents?

The Board makes policy. Management executes policy and runs Montebello day to day. An owner’s specific problem or issue would almost never come to the Board. Management should always be contacted first. That said, residents and owners do contact me, usually several a week. And I always try to help them, answer their questions, or put them in contact with someone who can help, whether inside or outside of Montebello. On issues referred to Management I always follow up with both the staff person handling the issue and with the owner or resident. I have visited dozens of units to see or discuss relevant issues.

What do you think about the current rules and policies of the Association? If you wanted to change any Association rule or amend the documents, what would these be, and what is your rationale?

I think Association rules and policies are good, and the Board is in the midst of a review of all Administrative Resolutions. Rules and policies evolve over time and there is a process – PR6 states this – to change them. The only policies that may be changed outside of that process involve life/safety issues – such as the policies and protocols enacted to help fight the spread of COVID-19.

What is your take on our amenities spending? What new amenities would you add? Do you think amenities add to property values? As a board member, how would you solicit opinions for amenities you personally don't use?

Our major amenities stem from the original condo documents in 1981. Over forty years we have enhanced and added amenities and no doubt will continue to do so. This is for the enjoyment of our residents. Our spending allows us to have a wide range of amenities, each of which is enjoyed by a small subset of residents.

The Quality Improvement Committee surveys the community regarding changes or additions to amenities. Pre-pandemic, adding additional outdoor games – pickleball, bocce, and more – had wide resident support.

Returning or incumbent members – please list some of your accomplishments and lessons learned as directors.

As President I formed and served on the Montebello Coronavirus Work Group before the first COVID death was recorded in the United States. The Work Group members worked daily to research the virus, analyze data, and regularly make recommendations to Management on policy and protocols to keep residents safe from the virus and to mitigate its spread on campus. Because of our proactive efforts, Montebello did not experience outbreaks of the original virus, the Delta variant, or the Omicron variant.

As stated earlier, I am most proud that, in the final years of the ten-year period of significant system and structure rebuilding, I was able to lead several Boards in completing the funding for those projects while keeping the condo fee increase at the Montebello historical average.

Everything that I have done or said has been in compliance with the Virginia Condominium Act, the Montebello Declaration, and the Bylaws. Within the constraints of those governing documents I have been as open and transparent as possible and committed to strong communications, authoring over 35 articles for the Times of Montebello and creating dozens of under-door brochures and MMLs.

We have a new general manager about to start his position here. What will you do to help ensure his success?

The new GM is a fully-qualified, experienced condo manager who needs only to learn about Montebello. Having made multiple visits to the campus, he has already met with Board members, senior staff, and department heads, had a half-day tour of the physical plant, and has reviewed the Bylaws, the current operating budget, the reserve schedule, the Emergency Preparedness Plan, and a variety of other documents that relate to rules and regulations. Once he takes charge, I will recommend he meets with our volunteer resident consultants who are subject matter experts in their respective fields. I hope that the next Board will stay on its side of the line, stick with policymaking and project approval, and not micromanage the new GM.

Doug Kleine

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Transparency and inclusiveness with unit owners and renters – former board president, Greg Bender, had a practice of asking meeting attendees whether anyone had any questions or comments about each agenda item. People felt they were part of the decision-making process. The residents’ forum at the end of the meeting was open to all people, not just unit owners. Would you consider reinstating these practices at board meetings?

The practice is older than that. It was a hallmark of Doug Kennett’s presidency. Unfortunately a tenant decided to use it for his own purposes, and the board had to retreat to the minimum required by statute or have one or two security staff at each meeting. Given the time that has passed, we should give comments another try.

Various marketing materials refer to Montebello as “premier” and “luxury.” How do you define what Montebello is and what it aspires to be? Please describe your views on our sense of community.

We won Association of the Year in 2018. The amenity package is widely regarded as “luxury.”

Does Montebello live up to its mission statement (below)? What can we do better?

“MCUOA’s vision is to be premier desirable condominium association. MCUOA’s values emphasize respect for others, neighborly cohesiveness, cultural sensitivity, age diversity, financial stability, and responsive, timely communications.”

We won Association of the Year and Communicator of the Year in 2018.

How well do you work with other people, and do you consider yourself a “team player”? If so, please offer some examples.

I have been an officer of 4 music organizations but I don’t sing any solos. I was part of a small group that wrote a comprehensive policy on clubs and instructor-led activities. I have chaired Covenants Committee and Finance & Budget Committee.



What is more important for Montebello: increasing property values or affordability?

It is not a zero sum calculation. For example, when we changed shuttle bus operations and contracted it out, we saved money and got much better reliability. When we follow guidelines of lenders for condo operations and fiscal policies, the seller gets a better price (better appraisal) and the buyer gets better loan terms and protection from “surprises” after purchase.

Explain your understanding of the roles of management vis-à-vis the board. When do you believe owners should contact the board or management? Are you personally open to receiving emails directly from or meeting with residents?

Virginia law requires that we have a written complaint policy that includes appeal to the board and ends with a binding review by the state ombudsman for condos. Board members have authority to act only when together (virtually or otherwise) and only when public notice is given. The best route for change is through committees and nearly all committees have open membership.

What do you think about the current rules and policies of the Association? If you wanted to change any Association rule or amend the documents, what would these be, and what is your rationale?

Fix the Purchaser Reserve Contribution at 2 times the monthly dues. It has never varied from that, but the possibility of the fee going as high as 6 times scares purchasers.

What is your take on our amenities spending?

What new amenities would you add? Do you think amenities add to property values? As a board member, how would you solicit opinions for amenities you personally don't use?

Amenities are relatively easy to add and powerfully difficult to subtract, even if the impact on the physical plant is minor. So adding new amenities should have a solid base of data from the community and measurable usage targets and an exit strategy if we guessed wrong.

Returning or incumbent members – please list some of your accomplishments and lessons learned as directors.

Learn the processes for getting things done. There is great value in doing a retreat at least once a year. Authored gift policy, club policy, budget guidelines, identified several resident consultants. Wrote Times articles. Supported increased communications.

We have a new general manager about to start his position here. What will you do to help ensure his success?

I have many years of experience in onboarding executive staff whose position depends on an effective relationship with an elected board that changes from year to year. A high priority is setting goals and expectations and establishing boundaries.

Foster “Nick” Nickerson

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I’ve been a resident for 25 years and an owner for 23 years. I was first attracted to Montebello by the woodlands. My childhood home was surrounded by woods. The other Condo Communities in the area were in the “concrete jungle” – for me a very dissatisfying environment. Montebello was a much more pleasant respite from my job. And, it offered convenient Metro access. I met my wife walking to the Metro one morning. Although we’ve both moved for work, we returned here because we see Montebello as our home.

I ran for the Board before, about 20 years ago. The reason for my candidacy then was my belief that we weren’t doing an adequate job maintaining our community. Our condo fees were low, but that is “cold comfort” when you are stuck in a broken elevator. Even though I was not elected then, our community became focused on the problem and solved it.

Last Spring, I ran for an unexpired term on the Board because I was concerned that we were developing the opposite problem. Our Condo Fees have increased significantly over the last 20 years. Our maintenance posture is much improved. But, we also have several expensive projects underway. And they have appreciable potential for cost overruns – and higher Condo Fees. I believed that my 30 years’ experience in military Project Management, Contracting and Budgeting would be an asset to the Board of Directors. I think that has proven to be true.

When I joined the Board in May, I found that the Treasurer had a more demanding job than I had anticipated. I offered to help out. That offer eventually led to me becoming the Assistant Treasurer. In that role, I have focused on Cost analysis, Cost reduction and Contracting. Those seemed to be the areas where I could be most useful. I specifically looked at the costs we were paying for our contracts, especially where there was no effective competition. In the Government we called this “should cost” analysis. It is the basis for determining if a contract is fairly priced. I also looked at areas where our community faces significant cost risk – such as potential structural problems like the ones that afflicted the Surfside, Florida condo building. I initiated the current effort to conduct a Structural Inspection of our towers and to institutionalize it as part of our normal Reserve Study. I also looked at the Electric Vehicle (EV) chargers project. By thorough research I found ways to reduce our initial

EV Charger cost by about \$65,000, while simultaneously providing flexibility to accommodate both increased demand and the possibility of changing technology.

One of the key things that I wanted to understand was the impact of a contract or project on

Condo Fees. We have approximately 1000 units here in Montebello. So, if we are looking at a \$100,000 project it will cost the average unit approximately \$100. A \$1 million project will cost the average unit \$1000. Thinking about writing that check helped me understand how any project/contract was affecting our owners.

Looking forward to continuing my service on the Board of Directors I will focus on four principles:

Maintain the Quality of Life at Montebello

I am committed to keeping our buildings, amenities, grounds, and roadways in excellent condition. Montebello should be a place we love and of which we are proud.

Affordability

At the same time we must realize that many of our residents are on a fixed income. We must do our best to keep living at Montebello affordable for our residents.

Transparency

I think it is vital that we listen to our fellow residents and keep them informed. All of the owners should be involved in our plans for the community.

Balance

We must recognize that our residents have varied priorities. Some seek new amenities. Others are more focused on keeping Condo Fees down. Maintaining a proper balance will always be a challenge. I accept that challenge.

