



37th Annual Housing Conference

Sunday, Nov. 12, 2017
8:00 a.m. – 5:30 p.m.
 Eleanor Roosevelt
 High School
 411 East 76th Street
www.cnyc.com

The Council of New York Cooperatives & Condominiums (CNYC) will hold its 37th annual Housing Conference on Sunday, November 12, 2017, at the Eleanor Roosevelt High School at 411 East 76 Street in Manhattan. This is a new venue for CNYC’s Conference, and there will be new programs along with returning favorites.

Sixty-seven classes will be offered in the course of the day; fifteen are new. Each conference participant can register for up to four classes. Exhibitors will be on hand to show products and services available to New York cooperatives and condominiums. City agencies will have information on recycling, water conservation, property tax abatements and exemptions, and more. ■

Solve My Problem!

Want some free advice? Visit our consultation tables to meet with industry experts. Take from three to seven minutes to get some quick guidance on how to solve your problems. Experts are staffing the following tables at the time designated. First come, first serve – so bring your concerns.

Time	Table #1	Table #2
8 AM – 9AM	Organics Recycling	Self-Management
9 AM – 10AM	Legal Questions	Insurance Questions
10 AM – 11AM	Large Construction Projects	Financial Topics
11 AM – 12 PM	Can my building get J-51?	Conducting Board Meetings
12 PM – 1 PM	Dogs/Pet Policy	Benchmarking in New York buildings of 25,000-50,000 sq.ft.
1 PM – 2 PM	When an Estate Holds a Unit	Fire Safety
2 PM – 3 PM	Self-Management	Retrocommissioning

For Members

Every cooperative and condominium that is currently a member of CNYC can send participants to this conference at no cost, provided they are registered by November 9. Additional participants enjoy modest member rates, with even better rates for team registration. CNYC extends these to members of the National Association of Housing Cooperatives, the Federation of New York Housing Cooperatives, and Condominiums, the Coordinating Council of Cooperatives, the Big Apple Chapter of the Community Associations Institute, the Association of Riverdale Cooperatives, and the Urban Homesteading Assistance Board. Registrations must be made by November 9 to enjoy these rates; classes must be selected at the time of registration.

**3-HOUR SESSIONS
8:45 TO 11:45 A.M.**

1. CURRENT SIGNIFICANT LEGAL DECISIONS FOR COOPERATIVES AND CONDOMINIUMS

NEW CNYC president Marc Luxemburg examines recent court decisions, providing commentary about how each case affects New York cooperatives and condominiums. *Application is pending for CLE credit.*

CLASS LEVEL Intermediate

FOR Board members, attorneys, and managers.

CO-OPS ONLY

2. LEGAL RESPONSIBILITIES OF CO-OP BOARDS

Attorney Dennis Greenstein will discuss the concepts common to the functioning of all cooperatives, focusing on the proprietary lease and bylaws, court cases, and the responsibilities of directors.

CLASS LEVEL Basic

FOR Board members, potential board members, attorneys, and managers.

CLASS LEVEL AND EDUCATION CREDITS

Basic: No special prior knowledge will be expected. **Intermediate:** Participants will be expected to understand board functioning. **Advanced:** Knowledge of the functioning of cooperatives and condominiums will be expected. **CLE:** Continuing Legal Education. **CPE:** Continuing Professional Education.

3. HOW DOES YOUR BUILDING WORK?

Peter Grech, a resident manager of a large cooperative, will explain in clear, non-technical terms, how key building systems work. Participants will leave with a better understanding of elevators, boilers, water tanks, and other building systems.

CLASS LEVEL Basic

FOR Board members, potential board members, building operations committee members, building staff, and residents.

4. THE TREASURER

The co-op or condo treasurer oversees all financial activities. Accountants Jayson Prisant and Robert Mellina will enumerate, and discuss the treasurer's responsibilities, suggesting systems of control, and practical, time-saving procedures. *CPE credit is available for accountants who take this class.*

CLASS LEVEL Basic

FOR Board members, potential board members, finance committee members, accountants, and managers.

CO-OPS ONLY

5. REPAIRS IN A CO-OP: WHO'S RESPONSIBLE?

Is it the shareholder or the corporation that is responsible for a particular repair in a cooperative apartment? The answer is not always evident. Attorney Phyllis Weisberg and property manager Jim Miller will provide sound guidelines. *CLE credit is available to attorneys taking this class.*

CLASS LEVEL Basic

FOR Board members, potential board members, attorneys, and managers.

HDFC CO-OPS ONLY

6. ASK UHAB: GOVERNANCE, AND MANAGING YOUR MANAGER

Housing Development Fund Corporation (HDFC) cooperatives have been providing affordable housing throughout New York City for more than 40 years, with subsidies and benefits such as property tax abatements and low-interest loans from the city, and technical assistance, and training from the Urban Homesteading Assistance Board (UHAB). UHAB staff members will

discuss issues limited-equity HDFC co-ops may be facing. Topics will include contracts, accountability, and communication among the board, the shareholders, and the managing agent.

CLASS LEVEL Basic

FOR HDFC board members, potential board members, and managers.

7. TOWARDS A CLEANER, GREENER NEW YORK CITY

NEW New York City and New York State have committed to reducing greenhouse gas by 80 percent below their 2005 levels by 2050. At the same time, the city is working to increase recycling and composting, working towards zero waste in 2030. To reach these ambitious goals, the city and the state offer guidance, incentive programs, and financing. CNYC board member Martha Sickles will moderate a panel with representatives from the Mayor's Office of Sustainability, the city's Retrofit Accelerator, and NYSERDA, with information from utility companies.

CLASS LEVEL Basic

FOR Board members, potential board members, energy committee, and green committee members, managers, and building superintendents.

8. RESERVE FUNDS

The reserve fund of a cooperative or condominium is the cushion protecting shareholders and unit-owners from sudden assessments or unanticipated jumps in carrying charges. It is a vital component of long-term plans for maintaining the building. CPA Abe Kleiman will discuss reasons for establishing reserves, means of accumulating funds, and prudent ways to invest these assets while effectively addressing the needs of your cooperative or condominium. *CPE credit is available to accountants taking this class.*

CLASS LEVEL Intermediate

FOR Board members, finance committee members, accountants, and managers.

**90-MINUTE SESSIONS
9 TO 10:30 A.M.**

21. NEW CODES AND RULES IN NEW YORK CITY

NEW EACH YEAR Laws passed by the City Council and regulations promulgated by city agencies impose new responsibilities on building owners each year. In this annual session, CNYC board member Gregory Carlson, who is also president of the National



37th Annual Housing Conference

Sunday, November 12, 2017

Eleanor Roosevelt High School – 411 East 76 Street

▲ Accounting CPE class 🏠 CLE credit pending ⚖️ CLE credit available ♣️ UHAB presentation
★ Advanced level course + Intermediate level course * Offered & updated every year.
● Discussion class where your participation will be expected. In all other classes, speakers will expect to make their full presentations before entertaining questions or commentary.

8:00 AM REGISTRATION and EXHIBITS

MORNING — Please select **ONE** numbered 3 or 2 hour morning class (1-8 or 31-39) or **TWO** consecutive shorter morning classes (21-24 followed by 41-44).

8:45 – 11:45

3-HOUR CLASSES

1. Current Significant Legal Decisions ★★ 🏠
2. Legal Responsibilities of CO-OP Boards
3. How Does Your Building Work?
4. The Treasurer ▲
5. Repairs in a COOPERATIVE – Who's Responsible for What? ⚖️
6. Ask UHAB: Governance and Managing Your Manager ♣️
7. Towards a Cleaner, Greener New York City
8. Reserves: Accumulating, Investing & Spending Them + ▲

9:00 – 10:30

90-MINUTE CLASSES

21. New Codes & Rules in NYC *
22. What Should Be in the Minutes?
23. Board Concerns Re: Trust Ownership
24. CONDO Borrowing Opportunities

10:45 – 12:00

75-MINUTE CLASSES

41. NYC Tax Abatement & Exemption Filing Requirements
42. Committees to Help Run Your Building ●
43. Fire Safety for Multi-Family Buildings
44. How to Improve Your CONDO By-Laws 🏠

9:30 – 11:30

2-HOUR CLASSES

31. Leadership Skills for Presidents
32. Sublet Issues in New York COOPERATIVES
33. Successful Redecoration of Public Space
34. Basic Financial Aspects of COOPERATIVES ▲
35. Role of the Managing Agent
36. Smoking Issues for NY Co-Ops and Condos
37. Onboarding New Board Members
38. Addressing Renovation Requests 🏠
39. All About House Rules

MIDDAY — Please select **ONE** midday class.

12:15 – 1:45 90-MINUTE CLASSES

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| 101. Are Reports of the Demise of the Business Judgment Rule Premature? ★ ⚖️ | 108. Recycling in NYC Apartment Buildings | 115. Management Transitions |
| 102. Developing a Policy Manual | 109. Investment Education for Board Members | 116. Spreadsheet Budgeting for Small Self-Managed Buildings |
| 103. CO-OP Shareholder vs. Board: Noise, Mold, Bedbugs, Water, etc. + ⚖️ | 110. Considerations Before Signing Local Law 11 FISP Reports | 117. Financing Energy Improvements |
| 104. We Can Control Building Costs | 111. Guidelines for Union Contract Compliance | 118. Amenities to Enhance Your Building |
| 105. A Go-Bag and a Plan for Emergencies | 112. How to Improve Your CO-OP By-Laws 🏠 | 119. When Dissidents are Elected to the Board |
| 106. Basics for New CO-OP Board Members ♣️ | 113. Coping With Excessive Hoarding | 120. Ask the Construction Attorney ● |
| 107. Can Your Building Harness Solar Energy? | 114. A Reserve Study for your Cooperative or Condominium | |

LUNCH BREAK – VISIT EXHIBITS: You may purchase snacks/box lunches in the Second Floor Cafeteria.

AFTERNOON — please select **ONE** afternoon class

2:30 - 4:30 2-HOUR CLASSES

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|--|---|
| 201. Dealing With Difficult Residents | 210. Reasonable Accommodations: Ramps, Comfort Pets, Parking Spots, Etc. ⚖️ |
| 202. CO-OP Admissions Policy & Procedures ⚖️ | 211. Your Building's Support Team: Super & Staff |
| 203. The Building Envelope: Your Roof & Exterior Walls | 212. A Transfer Fee for Your COOPERATIVE |
| 204. Understanding Your CO-OP's Audited Financial Statement ▲ | 213. Keeping Residents Informed |
| 205. Effective Interface Between Board & Management + ● | 214. Window Issues |
| 206. Ask UHAB: Wills & Estates Issues in Limited Equity HDFC Cooperatives ♣️ ● | 215. Board Concerns Re: Short Term Rentals |
| 207. Building Benefits From Energy Storage | 216. The Budget |
| 208. Insurance Guidelines for Your Building and Residents | 217. Alternatives to Privatization for HDFC & Mitchell-Lama Cooperatives ♣️ 🏠 |
| 209. Refinancing COOPERATIVE Underlying Mortgages | 218. Noise Complaints: Legal and Insurance Perspectives ⚖️ |
| | 219. Enforcing the Rules ⚖️ |
| | 220. Construction Contracts to Cover All Contingencies |
| | 221. Understanding Your Heating System |

DISCUSSING MY ISSUE

In addition to the Exhibitors' own tables where questions will be welcome about what the company does, there will also be two tables for DISCUSSING MY ISSUE. Visitors to these tables can meet for 3-7 minutes with a knowledgeable professional for a consultation on a specific, personal issue important to them or to their cooperative or condominium.

The chart that follows shows the areas of expertise where your questions will find answers and the times that you will want to be there to ask:

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12 PM - 1 PM	Dogs/Pet Policy	Benchmarking in NYC buildings of 25,000-50,000 sq.ft.
1 PM - 2 PM	When an Estate Holds a Unit	Fire Safety
2 PM - 3 PM	Self-Management	What is the Retrofit Accelerator?

4:40 PM – ASSEMBLY

At the end of the day, all participants are invited to gather in the Auditorium on the ground floor. CNYC leaders will highlight recent successes and introduce Mark Chambers, Director of the Mayor's Office of Sustainability. Door prizes will be awarded.

Association of Housing Cooperatives, brings participants up to date on the latest city requirements and their deadlines.

CLASS LEVEL Basic

FOR Board members, potential board members, building operations committee members, and managers.

22. WHAT SHOULD BE IN THE MINUTES?

The minutes of your board meetings are the official record of actions taken. Every board member shares responsibility for ensuring that the minutes accurately reflect the intentions of the board and do not contain any unnecessary information. Attorney Jeffrey Schwartz moderates.

CLASS LEVEL Basic

FOR Board secretaries, potential secretaries, other board members, and managers.

23. BOARD CONCERNS: TRUST OWNERSHIP

Attorney Peter Massa will help board members and managing agents understand what concerns the board should address when an owner seeks to transfer a unit to (or purchase it by) a trust or other entity. What are the risks? What restrictions might the board want to consider imposing? What is the typical procedure a board should follow when an individual desires to transfer his or her apartment to a trust?

CLASS LEVEL Intermediate

FOR Board members, shareholders, unit-owners, managers, and attorneys.

CONDOS ONLY

24. CONDO BORROWING OPPORTUNITIES

NEW When condos need funds to cover unexpected expenses or to fund major capital improvements, an association loan is an option to consider. A capital improvement loan enables the association to complete all the work at once and spread the cost over time rather than imposing a special assessment on the unit-owners. Banker Harley Seligman, attorney Marc Schneider, and property manager Jamie Shaw will discuss various ways that condominiums can borrow or encourage their unit-owners to borrow.

CLASS LEVEL Basic

FOR Board members, unit-owners, finance committee members, and managers.

**2-HOUR SESSIONS
9:30 TO 11:30 A.M.**

31. LEADERSHIP SKILLS FOR BOARD PRESIDENTS

The leadership skills of the board president drive the success of a cooperative or condominium. Management consultant Arthur Davis will help participants examine what makes the position of president unique among board members, exploring the special demands placed on presidents in the changing political environments of their buildings, and helping participants become more effective decision-makers, team-builders, motivators, and mediators, while guiding other directors toward becoming more responsive managers.

CLASS LEVEL Intermediate

FOR Board presidents.

CO-OPS ONLY

32. SUBLET ISSUES IN NEW YORK COOPERATIVES

Many cooperatives periodically review their sublet, admissions, and guest policies to ensure a consistently balanced approach to the changing needs of the building and its shareholders. Attorney Andrew Friedl will examine subletting both from the point of view of the board of directors and the shareholders who may wish to sublet. He will help participants consider procedures for reviewing sublet candidates and discuss sublet fees. The class will also explore restrictions, and conditions that boards might consider imposing in sublet situations, including short-term sublets. The law, and possible board policies with respect to occupancy by guests and roommates will also be discussed.

CLASS LEVEL Basic

FOR Board members, admissions committee members, attorneys, and managers.

33. SUCCESSFUL REDECORATION OF PUBLIC SPACE

The first impression of your building is conveyed by its public space. A well-designed lobby and hallways have a positive effect on the quality of life of every resident. Prospective purchasers react positively. Selecting and executing the appropriate new design depends on a strategically planned process, which interior designer Jonathan Baron will explore in this class, guiding participants through key steps that result in successful renovations of lobbies, hallways, elevator cabs, mail rooms, and building entrances.

CLASS LEVEL Basic

FOR Board members, house committee members, and managers.

CO-OPS ONLY

34. FINANCIAL ASPECTS OF COOPERATIVES

Accountant Michael Esposito will provide a careful analysis of budgets, management reports, and tax issues designed to help new treasurers, and other board members understand their responsibilities. With Course No. 204 on financial statements, this class provides a detailed overview of financial issues. *CPE credit is available for accountants who take this class.*

CLASS LEVEL Basic

FOR treasurers, other board members, potential treasurers, finance committee members, accountants, and managers.

35. ROLE OF THE MANAGING AGENT

The Residential Management Council of the Real Estate Board of New York (REBNY) was founded as a forum for principals and CEOs of management firms to exchange information and to cope collectively with industry issues. Management executive Michael Wolfe, who currently chairs the Residential Management Council, and Harry Smith will lead an interactive discussion of typical management contract provisions and the services buildings should reasonably expect from their management company.

CLASS LEVEL Basic

FOR Board members, potential board members, building operations committee members, and managers.

36. SMOKING ISSUES FOR CO-OPS AND CONDOS

NEW Secondhand smoke and smoking have become volatile issues in New York City. Smoking is strictly prohibited in restaurants and all other public areas in your cooperative or condominium building. Should your cooperatives and condominiums attempt to be smoke-free? What policies will you need to enact to meet this goal? What challenges will you face? How will resale value be affected? Are there discrimination issues to consider? Josh Berengarten will provide detailed advice about setting, and enforcing smoking policy.

CLASS LEVEL Basic

FOR Board members, potential board members, attorneys, and managers.

37. “ON-BOARDING” NEW BOARD MEMBERS



Newly elected board members need solid instruction and training to understand their roles and fiduciary duties. Operating a co-op or condo involves many of the same responsibilities as any other business, yet board members are volunteers who may not have the experience needed. Management companies are important partners in empowering new board members and helping them learn the ropes. Management executive Dan Wurtzel will moderate.

CLASS LEVEL Basic

FOR Board members, potential board members, and managers.

38. ADDRESSING RENOVATION REQUESTS

Shareholders and unit-owners will often submit renovation plans to the board that are problematic either because they do not conform to code or because their implementation would have a potentially adverse impact upon neighbors or the building’s operation. Under these circumstances the board has the right to say “no” to all or parts of renovation proposals or to require modifications to the plans presented. Attorneys Bruce Cholst and Alfred Taffae and architects Oswald Bertolini and Eric Vonderhyde will guide participants in a discussion of renovation policies and procedures, the types of requests that are typically problematic and why, and suggestions on how to deal with them. *Application is pending for CLE credit.*

CLASS LEVEL Basic

FOR Board members, architects, attorneys, and managers.

39. ALL ABOUT HOUSE RULES

Every cooperative and condominium starts its existence with a set of boilerplate house rules. Over time, these can be updated, amended, or simply ignored as new building policies are instituted. Attorney Peter Livingston will discuss the role of house rules in a cooperative or condominium, their relationship to other corporate documents, how to change the rules, and ways to make sure that everyone knows what they are. Examples of what belongs or does not belong in the house rules will also be discussed.

CLASS LEVEL Basic

FOR Board members, potential board members, attorneys, and managers.

**75-MINUTE SESSIONS
10:45 A.M. TO 12 P.M.**

41. TAX ABATEMENT EXEMPTION FILING REQUIREMENTS



Homeowners in New York City co-ops and condos may be eligible for a number of exemption and abatement programs, but careful filings are needed to obtain and maintain these privileges. Jim Rheingrover, chair of CNYC’s Action Committee for Reasonable Real Estate Taxes, and Stephanie Gross, from the city’s Department of Finance, will discuss available programs.

CLASS LEVEL Basic

FOR Board members, treasurers, and managers.

DISCUSSION CLASS

42. COMMITTEES TO HELP RUN YOUR BUILDING

Anyone who has served on a board knows how time-consuming the workload can be. Attorney Theresa Racht will lead a discussion on how the effective use of committees can actually ease the board’s burden as well as provide a mechanism to move controversy outside board meetings so that decision-making during board meetings is easier.

CLASS LEVEL Basic

FOR Board members, potential board members, potential committee members, and managers.

43. FIRE SAFETY FOR MULTI-FAMILY BUILDINGS



The FDNY Fire Safety Education Unit will provide advice on dealing with the particular problems faced when fires occur in multi-family buildings. The focus will be on fire prevention measures and on helping residents understand how to ensure their personal safety in the event of a fire.

CLASS LEVEL Basic

FOR Board members, house committee members, superintendents, managers, and residents.

CONDOS ONLY

44. HOW TO IMPROVE YOUR CONDO BYLAWS

Many condominiums continue to use their decades-old original bylaws even though these were written by the sponsor, and did not take into consideration many of the challenges of

condo governance. Attorneys Andrew Brucker and Christian Daglieri will point out problem areas in typical New York condo bylaws, and will suggest remedies for these problems. Further, they will address current situations that are not even considered in the old form of bylaws. *Application is pending for CLE credit*

CLASS LEVEL Basic

FOR Condo board members, unit-owners, attorneys, and managers.

**90-MINUTE SESSIONS
12:15 A.M. TO 1:45 P.M.**

101. THE BUSINESS JUDGMENT RULE

Attorney Marc Luxemburg will review the Business Judgment Rule and how it was apparently intended to function by the court of appeals. He will go on to discuss how it is actually functioning in the courts today, and the implications these changes have for decision-making by boards in order to justify their actions when they are challenged in court. *CLE credit is available for attorneys taking this class.*

CLASS LEVEL Intermediate

FOR Board members and attorneys.

102. DEVELOPING A POLICY MANUAL FOR YOUR CO-OP OR CONDO

How does a co-op or condo maintain consistency in its rules and interpretation of its governing documents when boards and management change over time? How can residents know the rules as they have evolved over the years? Coordinate all this information in one place, eliminate the inconsistencies, make certain that the rules still make sense, and you have a policy manual specific to your property. Attorneys Stuart Saft and Jacqueline Debbs will start you on the path to developing such a manual for your co-op or condo.

CLASS LEVEL Basic

FOR Board members, residents, attorneys, and managers.

CO-OPS ONLY

103. CO-OP SHAREHOLDER VS. BOARD

When costs are incurred because of water penetration, removing mold, eradicating bedbugs, or controlling noise and odors in apartments, the cooperative must walk a careful line

in distinguishing its responsibilities from those of the shareholder. Attorney Arthur Weinstein will explore these issues. *CLE credit is available for attorneys taking this class.*

CLASS LEVEL Intermediate

FOR Board members, potential board members, shareholders, attorneys, and managers.

104. WE CAN CONTROL BUILDING COSTS

Significant savings can be made through a careful review of all building expenditures. Management executive Mark Hoffman and CNYC board member Ted Procas, who is also chairman of the Association of Riverdale Cooperatives, will review typical building expenses and will share secrets for containing runaway budgets.

CLASS LEVEL Basic

FOR Board members, finance committee members, building operations committee, house committee members, and managers.

DISCUSSION CLASS

105. EXPLORING ETHICAL CHALLENGES

A board position should never be used for personal gain or to promote the interests of family, friends, or business associates or board members. Consultants Linda Brockway and Greg Carlson will lead a discussion of ethical dilemmas.

CLASS LEVEL Basic

FOR Board members, potential board members, residents, and managers.

CO-OPS ONLY

HDFC FOCUS

106. FOR NEW BOARD MEMBERS

NEW For more than 40 years, UHAB has provided technical assistance, training, and services for Housing Development Fund Corporation (HDFC) cooperatives. In this interactive class, UHAB staff members will discuss what every new board member needs to know.

CLASS LEVEL Basic

FOR HDFC board members, potential board members, attorneys, and managers.

107. CAN YOUR BUILDING HARNESS SOLAR ENERGY?

Could your building begin using the sun's renewable energy to produce electricity? How does it work? What might it cost?

Solar expert Noah Ginsburg will provide an introduction to solar options available today, and discuss incentive programs available to help defray their cost.

CLASS LEVEL Basic

FOR Board members, operations committee and green committee members, managers, and residents.

108. RECYCLING IN APARTMENT BUILDINGS

Ashlee Barker, from the city's Bureau of Recycling and Sustainability, will discuss recycling guidelines and requirements and provide opportunities for personalized recycling assistance for your building. She will also share information on textile recycling, easy ways to handle electronic waste, organics collection, and other programs.

CLASS LEVEL Basic

FOR Board members, green committee members, staff, and managers.

109. INVESTMENT EDUCATION FOR BOARD MEMBERS

NEW Financial advisor Andrew Dreisiger and accountant Annette Murray will help participants understand opportunities and constraints when investing the funds of your cooperative or condominium.

CLASS LEVEL Basic

FOR Board members, treasurers, finance committee members, and managers.

110. CONSIDERATIONS BEFORE SIGNING LOCAL LAW 11 FISP REPORTS

Work required by Local Law 11 reports is frequently expensive and sometimes not necessary. Architects Douglas Lister and Stephen Varone will discuss facade inspection requirements.

CLASS LEVEL Basic

FOR Board members, building operations committee members, architects, and managers.

111. GUIDELINES FOR UNION CONTRACT COMPLIANCE

On April 20, 2018, the current contract with the union, Local 32BJ SEIU will expire; the union represents building service employees in Manhattan, Brooklyn, Queens, and Staten Island. The contract covering building employees in the Bronx, expires in March 2019. The Realty Advisory Board on Labor Relations (RAB), and its counterpart, the Bronx Realty

Advisory Board represent building owners (including cooperatives and condominiums) in their contract negotiations, and arbitration issues. In this class, RAB President Howard Rothschild will provide pointers on compliance with the provisions of current contracts.

CLASS LEVEL Basic

FOR Board members, building operations committee members, and managers.

CO-OPS ONLY

112. HOW TO IMPROVE YOUR CO-OP BYLAWS

Does your cooperative still use the original bylaws written by the sponsor decades ago? Do they address all the challenges of co-op governance that you face? In this class attorneys Andrew Brucker and Christian Daglieri will discuss problem areas and solutions in typical New York co-op bylaws. *Application is pending for CLE credit.*

CLASS LEVEL Basic

FOR Board members, attorneys, and managers.

113. A "GO-BAG" AND A PLAN FOR EMERGENCIES

NEW Just as your cooperative or condominiums should have careful plans in place for dealing with emergencies, you should also encourage residents to be similarly prepared. Prepare a "Go-Bag" for each family member and store it in a convenient location. Mary Fischer, member of a Community Emergency Response Team, will lead a discussion on this subject.

CLASS LEVEL Basic

FOR Board members, house committee members, and managers.

114. A RESERVE STUDY FOR YOUR COOPERATIVE OR CONDOMINIUM

A reserve study is a procedure that helps boards plan for the ongoing repairs, and replacements of building systems. Many lenders will ask to see such a study. Engineer Mitchell Frumkin will discuss in detail what a reserve study involves, how it is prepared, and how it should be reviewed, and regularly updated by the board.

CLASS LEVEL Basic

FOR Board members, building operations committee members, and managers.

115. MANAGEMENT TRANSITIONS

Transitions to new management aren't always smooth. Accountant Mindy Eisenberg Stark and attorney Jeff Schwartz will lead a discussion of how to shop for and select the firm and agent that are right for your cooperative or condominium; what contract provisions will help define the expectations of both parties; and how to be certain that records, and documents all reach the new management firm promptly, and in good order.

CLASS LEVEL Basic

FOR Board members and building operations committee members.

116. SPREADSHEET BUDGETING FOR SMALL, SELF-MANAGED BUILDINGS

NEW In many small, self-managed buildings, growing costs can necessitate significant annual maintenance increases.

Rebecca Poole, executive director of the Community Associations Institute Big Apple Chapter, will provide easy-to-follow spreadsheet templates for tracking income and expenses, and will demonstrate how to use them to plan future budgets.

CLASS LEVEL Basic

FOR Board members, treasurers, and potential board members.

117. FINANCING ENERGY IMPROVEMENTS

NEW Energy improvements can help your cooperative or condominium save on operating costs while helping the environment by shrinking your carbon footprint. But the cost of planning and implementing these improvements can be daunting. There are financing options that help you spread the cost of your improvement or dedicate future savings toward repayment of the debt will explain some of these options and will illustrate with examples of successes already achieved.

CLASS LEVEL Basic

FOR Board members, green committee members, finance committee members, and managers.

118. AMENITIES TO ENHANCE YOUR BUILDING

Management executive Neil Davidowitz will lead a session on amenity options; it will cover methods for establishing priorities and effective ways to get resident input on the decision, and will then show how to implement it. Architect Dennis

Mele and storage professional Josh Goldman will join in to provide insights regarding these amenities.

CLASS LEVEL Basic

FOR Board members, house committee members, and managers.

119. WHEN DISSIDENTS ARE ELECTED TO THE BOARD

NEW The election of new directors who were formerly dissidents presents challenges to boards. Attorney James Glatthaar will help participants find ways to work productively with these individuals. He will also provide his list of the top 10 things a newly elected director/manager should avoid in his or her first year holding office.

CLASS LEVEL Basic

FOR Board members, potential board members, and managers.

DISCUSSION CLASS

120. ASK THE CONSTRUCTION ATTORNEY

Bring your questions to attorney C. Jaye Berger, who will explain what to look for when selecting a contractor, key provisions in contracts, how to negotiate these provisions, insurance issues, mechanic's liens, subcontractors, and managing the construction process.

CLASS LEVEL Basic

FOR Board members, building operations committee members, and managers.

121. COPING WITH EXCESSIVE HOARDING

Public awareness of the hazards of hoarding has been growing, and in 2013 the medical profession officially declared hoarding a disorder. Hoarding expert Kristin Bergfeld will talk about and distribute copies of her nationally accepted and utilized Clutter-Hoarding Scale, and explain how to use it. She will also join with attorney Marc Schneider to help explore legal issues.

CLASS LEVEL Basic

FOR Board members, attorneys, and managers.

2-HOUR SESSIONS 2:30 TO 4:30 P.M.

201. DEALING WITH DIFFICULT RESIDENTS

Every building is challenged by the demands of difficult residents: people who are convinced that they are exempt from

all rules. Attorneys Stuart Saft and Jacqueline Debbs will suggest creative and effective ways to deal with difficult residents.

CLASS LEVEL Basic

FOR Board members, shareholder relations committee members, attorneys, and managers.

CO-OPS ONLY

202. CO-OP ADMISSIONS POLICY AND PROCEDURES

Attorney Arthur I. Weinstein and property manager Eric Kaplan will detail the responsibilities of the board of directors and the admissions committee in establishing criteria and reviewing applications for the purchase of shares for units in a cooperative. Various housing discrimination laws will be reviewed in detail. Sublet policy will be touched upon briefly in this session, but it is also the subject of a separate CNYC class (No. 32). CNYC's prototype application form will be distributed and discussed. *CLE credit is available for attorneys taking this class.*

CLASS LEVEL Basic

FOR Board members, potential board members, attorneys, and managers.

203. THE BUILDING ENVELOPE: ROOF AND EXTERIOR WALLS

Architect Adam Szenk will address preservation of the building envelope, and terminology, and techniques to be aware of in supervising roof repair, and replacement, pointing, masonry repairs, and waterproofing.

CLASS LEVEL Basic

FOR Board members, potential board members, building operations committee members, and managers.

CO-OPS ONLY

204. AUDITED FINANCIAL STATEMENT

CPA Michael Esposito will walk you through a line-by-line review of financial statements for cooperatives, discussing issues related to each item. This session is designed to introduce new treasurers and interested board members to the basics of co-op financial statements. With CNYC Class No. 34, this will provide a detailed overview of the financial responsibilities of the co-op board. *CPE credit is available for accountants who take this class.*

CLASS LEVEL Basic

FOR Board members, shareholders, finance committee members, accountants, and managers.

DISCUSSION CLASS

205. EFFECTIVE INTERFACE BETWEEN BOARD AND MANAGEMENT

CNYC board members Marleen Levi, and Gregory Carlson will lead a discussion that focuses on identifying, developing, implementing, and adapting work styles that yield result-oriented interaction between board, and management.

CLASS LEVEL Intermediate

FOR Board members and managers.

DISCUSSION CLASS

HDFC MEMBERS ONLY

206. ASK UHAB: WILLS AND ESTATES ISSUES IN LIMITED EQUITY HDFC COOPERATIVES

This class will offer information that will help board members and shareholders in limited equity cooperatives understand their rights and responsibilities relative to the inheritance and transfer of apartments on death. Attorneys will discuss how family members and boards in HDFC cooperatives should proceed after the death of a shareholder, including steps that they can take to avoid having apartments tied up in legal proceedings to settle an estate. Many issues parallel those in conventional cooperatives. Who gets the apartment? Can a board reject an heir? What if maintenance is not being paid? Other issues are unique to HDFCs or to limited-equity housing.

CLASS LEVEL Basic

FOR HDFC board members and shareholders, attorneys, and managers.

207. BUILDING BENEFITS FROM ENERGY STORAGE

NEW Energy Expert Lewis Kwit and CNYC board member Martha Sickles will introduce the concepts, technologies, and opportunities of energy storage. Storage has primarily been used by utilities but projections point towards substantial growth, with the majority of future applications on the customer side of the meter. The session will discuss how storage can be implemented in cooperatives and condominiums to reduce costs, facilitate demand response earnings, stretch the value of on-site generation, and enhance building resiliency in case of blackouts. Panel members Tom Scalia of Demand Response, Cory Mauer of Integrated Storage Technologies, and Haym Gross, founder of the Solar Salon, will make presentations.

CLASS LEVEL Basic

FOR Board members, Green Committee members, building operations committee members, staff, and managers.

208. INSURANCE GUIDELINES

Insurance expert Patricia Batih and attorney Adam Finkelstein will review the full range of insurance coverages necessary for a typical building and each of its residents. They will discuss the cost of insurance and will suggest ways a building can maintain appropriate coverage.

CLASS LEVEL Basic

FOR Board members, finance committee members, and managers.

CO-OPS ONLY

209. REFINANCING UNDERLYING MORTGAGES

Attorney Theresa Racht will moderate a seminar exploring diverse aspects of refinancing underlying mortgages on cooperative buildings, with the help of accountant Mindy Eisenberg Stark and property manager David Lipson. The session will begin with a careful look at mortgage basics, including guidance about prerequisites, costs, preparation, and obligations, and will include suggestions for maximizing your building's borrowing power.

CLASS LEVEL Basic

FOR Board members, finance committee members, and managers.

210. REASONABLE ACCOMMODATION

Marc Schneider will discuss what your board should do when it receives a request for an accommodation or modification of the building based upon a medical necessity. His presentation will analyze the various laws applicable to such requests including the Fair Housing Act, the New York State Human Rights Law, and the New York City Human Rights Laws. Learn how to avoid lawsuits and discrimination claims. What should the board do if a formal complaint is filed? Is the claim covered by insurance? Plus other issues that board face in connection with a request. *CLE credit is available to attorneys taking this class.*

CLASS LEVEL Basic

FOR Board members, attorneys, and managers.

211. YOUR BUILDING'S SUPPORT TEAM: SUPER AND STAFF

Bring your contract questions to this class where Realty Advisory Board President Howard Rothschild will suggest effective ways to deploy, motivate, and discipline building employees. Margie Russell, executive director of the New York Association of Realty Managers, will provide insights on training staff.

CLASS LEVEL Basic

FOR Board members, personnel committee members, and managers.

CO-OPS ONLY

212. A TRANSFER FEE FOR YOUR COOPERATIVE

Instituting or changing transfer fees typically requires amending the corporate documents, with the requisite majority or supermajority vote. Property manager Irwin Cohen, accountant Carl Cesarano, and attorney Stuart Wachs will explore benefits, drawbacks, and market expectations with regard to the roles of buyers, sellers, lenders, brokers, and attorneys in addressing transfer fees.

CLASS LEVEL Basic

FOR Board members, managers, and shareholders.

213. KEEPING RESIDENTS INFORMED

Communications professional Lloyd Chrein, attorney Ronald J. Gold, and property manager Mark Levine will present ways to maintain open and effective lines of communication, including written communications, social media, and on-site communication techniques.

CLASS LEVEL Basic

FOR Board members, communications committee members; house committee members, and managers.

214. WINDOW ISSUES

Architect Douglas Lister and management executive Neil Davidowitz will review window replacement and repair technologies and board policies on the subject. Many window controversies can be avoided if the board has clear guidelines for residents to use when repairing or replacing windows. The class will include advice on preparing these guidelines. It will also explain the difference between a \$350 replacement window, and a \$2,500 replacement window, and will suggest strategies for replacing or repairing windows in historic buildings.

CLASS LEVEL **Basic**

FOR Board members, building operations committee members, and managers.

215. BOARD CONCERNS: SHORT-TERM RENTALS

The internet age and the shared economy have resulted in frequent cases of unknown individuals arriving to live in cooperative or condominium units without guest procedures having been followed or board permission received. There is potential danger to the residents, and to the “guests” in these situations. Property managers Dawn Dickstein, Michael Mintz, and attorney Peter Livingston, and Ari Teiman will help you develop procedures for identifying, and dealing with short-term rentals in your building. How will you deal with a resident who is truly a “host,” and will be there to supervise paying guests? Will your building ever allow such activity in the absence of the unit’s owner?

CLASS LEVEL **Basic**

FOR Board members, potential board members, attorneys, and managers.

216. THE BUDGET

Every well-run cooperative or condominium develops an annual budget to govern spending and to determine the amount of carrying charges that must be collected from each shareholder or unit-owner. The building manager, the accountant, and the treasurer should all participate in the development of your budget. Accountant Steven Beer will offer insights to help you establish and monitor a prudent budget. *CPE credit is available for accountants who take this class.*

CLASS LEVEL **Basic**

FOR Board members, finance committee members, accountants, and managers.

HDFC AND MITCHELL-LAMA CO-OPS

217. ALTERNATIVES TO PRIVATIZATION FOR HDFC AND MITCHELL-LAMA COOPERATIVES



Erica Buckley, former head of the Real Estate Finance Bureau of the New York State Attorney General’s Office, returns to her roots in affordable housing to present a class suggesting a variety of alternatives for limited equity cooperatives whose members seek to preserve affordability while also opening avenues for modest wealth building. *Application is pending for CLE credit for attorneys taking this class.*

CLASS LEVEL **Basic**

FOR HDFC/Mitchell-Lama board members and shareholders, attorneys, and managers.

218. NOISE COMPLAINTS

Noise complaints constitute a significant portion of quality of life issues for residents within cooperatives and condominiums. This course will explore how boards and management can address noise complaints with an eye towards resolving and preventing a protracted legal dispute, if possible, or if necessary, defending against litigation. Guidelines will be offered about when to submit a claim to the building’s insurance carrier, and how the carrier typically analyzes, and determines coverage. *CLE credit is available to attorneys taking this class.*

CLASS LEVEL **Intermediate**

FOR Board members, attorneys, and managers.

219. ENFORCING THE RULES

Boards’ power to impose rules on their community residents is the quintessential feature of cooperative and condominium living. Unfortunately, the exercise of that power often results in acrimony, and costly litigation. Attorney Bruce Cholst will discuss strategies for enforcing the rules while minimizing tension, and the prospect of litigation. If litigation is

unavoidable, he will also explore boards’ powers, and legal remedies in compelling compliance with their regulations. *CLE credit is available to attorneys taking this class.*

CLASS LEVEL **Basic**

FOR Board members, potential board members, attorneys, and managers.

220. CONSTRUCTION CONTRACTS

No capital project should ever be undertaken before a carefully constructed contract has been vetted by legal counsel. Architect Stephen Varone and attorney Andrew Brucker will provide insights into critical/controversial clauses in this standard AIA contract, with suggestions on how best to handle each issue. Changes that have been incorporated into the new version of the A101/201 issued by the American Institute of Architects in 2017, and the potential impact of those changes on the typical project, will also be reviewed. Participants will leave with many tips toward effective contract preparation.

CLASS LEVEL **Basic**

FOR Board members, building operations committee members, attorneys, architects, and managers.

221. UNDERSTANDING YOUR HEATING SYSTEM

A clear understanding of how heating systems operate will help you make maximum use of your energy dollars. This class will take an in-depth look at the heating plant of buildings of between 20 and 1,000 apartments. Attention will be paid to boilers, burners, controls, and inspection requirements. Experts Fredric Goldner and Asit Patel will provide practical facts and figures about the cost of maintaining and upgrading existing systems.

CLASS LEVEL **Basic**

FOR Board members, building operations committee members; green committee members, building staff, and managers.