Email Etiquette for ROCs

How to make your email more effective, and how to avoid the pitfalls
Definition: 
et-i-quette
noun

“The customary code of polite behavior in society or among members of a particular group.”
Why is etiquette important when using email?

- Email is a common method of communication
- The tone of an email can be misinterpreted
- Without face-to-face interaction, an email can convey unintended emotions
- Email is forever and can be in circulation for many years
Components of Email Etiquette

- Email Format
- Length of message
- Attachments
- Appropriate and inappropriate material
- Mail lists and group delivery
Email Format

What do you see?

(contract) with builder construction I also would like copy of agreement that talked about funds for rehab and other expenses that did not happen but will so we need to know how to say yes or no if a price is the same as the one we got when we worked with you to put it together before we signed the agreement because I was not in the meeting and want to see what the other board ageed to and did or did not approved the paperwork before the agreement by the board members so I may review it. i did not understand the last email you sent.
Email Format

What do you see?

To: Kelli Cicirelli;

PLEASE COME TO OUR BOARD MEETING NEXT WEEK. THE ISSUES ARE RULE VIOLATIONS AND CHANGING MEMBERSHIP POLICIES. MEETING WILL BE AT THE REGULAR LOCATION AT 6:00.

BOB THE PRESIDENT

Sent from Yahoo Mail. Get the app
Email Format

What do you see?

Been happening for a while, that after we hold a Board of Directors monthly meeting, he goes home and he tells his wife & brother (who lives with him), & the neighbors across the road from him, everything that is discussed during our Executive Session! Then in turn they are going around and telling other people what is going on during the Executive Session! These same people are starting to cause problems with other members in the park! Including with their niece & husband, who live 3 doors down from them! We need some advice on how to handle this situation! If you want to call me, I will be home for most of the day, till 5:30 pm! We would like to deal with this ASAP!
F2F meeting w u?

Kelli Cicirelli to you

Am req a f2f w/ u 2 discuss board activs? R u avail on 820 @ 10? Pls lv a msg.
Thanx.

Kelli Cicirelli to you

Hi Alice,

I am requesting a face to face meeting with you to discuss the board activities you brought to my attention last week.

Are you available on Aug 20 at 10:00am?

Please leave me a message and let me know.

Thanks,
Kelli
Email Format

What’s a “good” email look like?

Dear Person,

Notice the 2 spaces above. This line should briefly tell you why I’m writing and support the information that will come on the next line or paragraph. Remember, email should be as brief as possible. If the message is long or complex, you should consider a phone conversation or face-to-face.

Put spaces between paragraphs. If I am going to list a few reasons, or some items, or several things — instead of using one long sentence, try using bullet points to keep the text clean and tidy to follow:

- I like this
- And this
- This too
- And finally this

The last part of the email should be your ask. If there is one. For example, please provide copies of board minutes for the 4 dates listed above. Always suggest if there are questions to tell you know. And finally, thank this person for their assistance, or their attention, or for their help.

This line isn’t imperative for email, but you can sign-off with best regards, or sincerely, or thank you. Always with a comma after. Then 2 spaces.

Your name.

Sent from Yahoo Mail. Get the app
Email Format

- Email during the same hours your would use the phone
- Use spell check and decent grammar
- Use caps appropriately
- Use fonts that are neutral and easy to read
- The most important thing to remember about format? TONE
Email Format

Tone: Use positive words and direction in ALL your communication. Why?

• Easier to Understand and Remember
• Helps build better relationship with people
Replace negative works with more positive words.

Instead of:

• Don’t hesitate to call me
• The problem is…

Try this:

• Feel free to call me
• A solution should be found for…
Present ideas and possibilities, instead of difficulties to overcome.

Helpful Hint: Avoid the word “not”

Instead of:

• Not accept
• Does not have
• Not unless

Try this:

• Decline
• Lacks
• Only if
Positive tone examples:

- Don’t forget to attend the board meeting
- Please remember to attend the board meeting
- You can’t select a vendor until you get three bids
- You can select a vendor once you get three bids
- Your paperwork will not be accepted until...
- Your paperwork will be accepted when...
Components of Email Etiquette

- Email Format
- Length of message
- Attachments
- Appropriate and Inappropriate material
- Mail lists and group delivery
Length of Email? Keep it brief!

- Rule of thumb: content should all fit on one screen without scrolling
- If you are introducing a variety of topics, consider separate emails with distinct subject lines
Email Attachments

• Tell your recipient the name of the file and the program

“Attached you’ll find an Excel file titled Proposed Budget for 2016”

“The minutes are attached as Minutes from June 2016 in Word format”
Appropriate/Inappropriate Material and Behavior with Email

**Appropriate**

- Use “reply all” when more than one person is included on thread
- It is ok to address one person in the text, “Bob, regarding your question about...”

**Inappropriate**

- If you are asking for something don’t make the ask last minute
- Avoid writing by email a long list of problems or grudges that have been bugging you for a while
Complaints about a person should be in person and never part of a group/chain email.

Remember that email is forever and can’t be taken back.

Before you hit send, ask yourself: If face-to-face, would I say this?

Never respond angry. Calm down and read it again in 4 hours or better yet, the next day.
If you’re on the receiving end of an angry email?

• Thank the person for bringing it to your attention
• Empathize with the sender’s email
• If the situation is being resolved, point that out
• Apologize if it’s needed
• Don’t get caught up in the weeds by arguing the details of the email
• Remember: Face-to-face is always better to resolve conflict
Email no-no: Board Decision Making!

• No legal cooperative business – like contract approvals, decisions on actions to be taken

• No decisions to send out rule violations or late rent notices – reserve this discussion for a Board’s executive session
Acceptable Email Communication

• Reminder about and upcoming meeting
• Draft minutes before a board meeting
• Newsletters or flyers
• Meeting cancellation or change in venue
• Getting input for the agenda
Talk to your Technical Assistance Provider for more information on strengthening your communication skills.

Information contained in this presentation was adopted from Purdue University Writing Lab and Brunerbiz’s Keep Your Tone Positive.
## Records Retention Chart

<table>
<thead>
<tr>
<th>Type of Record</th>
<th>Description</th>
<th>Retention Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Co-op and Board</strong></td>
<td>Articles of Incorporation</td>
<td>Life of corporation + seven years</td>
</tr>
<tr>
<td></td>
<td>Bylaws and amendments, all versions</td>
<td>Life of corporation + seven years</td>
</tr>
<tr>
<td></td>
<td>Board meeting minutes</td>
<td>Life of corporation + seven years</td>
</tr>
<tr>
<td></td>
<td>Membership Meeting minutes</td>
<td>Life of corporation + seven years</td>
</tr>
<tr>
<td></td>
<td>Community Rules and amendments, all versions</td>
<td>Life of corporation + seven years</td>
</tr>
<tr>
<td></td>
<td>Copy of loans and mortgages</td>
<td>Until discharge is recorded</td>
</tr>
<tr>
<td></td>
<td>Copy of the deed</td>
<td>Until property is sold</td>
</tr>
<tr>
<td></td>
<td>Correspondence</td>
<td>Two years</td>
</tr>
<tr>
<td></td>
<td>Grant Applications</td>
<td>Two years after completion of project</td>
</tr>
<tr>
<td></td>
<td>Insurance Policies and Certificates</td>
<td>Two years after expiration</td>
</tr>
<tr>
<td></td>
<td>Construction documents</td>
<td>20 years after completion</td>
</tr>
<tr>
<td><strong>Financial Records</strong></td>
<td>Invoices and Receipts</td>
<td>Three years</td>
</tr>
<tr>
<td></td>
<td>Bank Statements</td>
<td>Three years</td>
</tr>
<tr>
<td></td>
<td>Financial Reports</td>
<td>Three years</td>
</tr>
<tr>
<td></td>
<td>Audit records</td>
<td>Three years</td>
</tr>
<tr>
<td></td>
<td>Tax Returns</td>
<td>Three years</td>
</tr>
<tr>
<td></td>
<td>Budget reports</td>
<td>Three years</td>
</tr>
<tr>
<td><strong>Employment Records</strong></td>
<td>Applications and References</td>
<td>One year</td>
</tr>
<tr>
<td></td>
<td>Advertisement for Employment</td>
<td>One year</td>
</tr>
<tr>
<td></td>
<td>Records of injuries</td>
<td>Three years</td>
</tr>
<tr>
<td><strong>Applicant Records</strong></td>
<td>Application- NOT admitted, including authorization to pull credit report, Notice of Adverse Action, etc.</td>
<td>Two years past denial</td>
</tr>
<tr>
<td><strong>Resident Records</strong></td>
<td>Application and all supporting documents: Notices to and from a lender, Acknowledgment Forms, Documentation sheets, Volunteer letter and log, Occupancy Agreement, correspondence</td>
<td>Two years beyond termination of residency</td>
</tr>
<tr>
<td><strong>Credit Reports</strong></td>
<td>Membership Certificate</td>
<td>Life of co-op, plus 7 years</td>
</tr>
<tr>
<td>Authorization Forms</td>
<td>For all applicants, residents, members</td>
<td>24 months, or longer as directed by Credit Reporting Agency</td>
</tr>
</tbody>
</table>

According to the co-op’s bylaws, co-op records shall be:
- Kept by the directors then in office, whether in their homes, or in a central location
- Transferred over to new directors, when elected or appointed
- Kept according to the Records Retention Schedule (above)

Additionally, records of the co-op are open for inspection by any member in good standing at a reasonable time and place, within 48-72 hours of the member’s request, depending on the co-op’s bylaws. This inspection shall exclude those documents that are protected by a resident’s right to privacy, such as credit reports, criminal background information and matters pertaining to rent collection or eviction.

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