

Association Manager

Job Description

While homeowners experience various levels of activity from their Association Manager, the following summarizes those duties and tasks that are generally desired and traditionally performed by a Manager.

The basic role of the Association Manager is two-fold: 1) provide leadership to the volunteer and often inexperienced (with regards to HOA law and governance) Board, and 2) enforce the rules, regulations and policies as outlined in the Association's governing documents (CC&Rs and Design Guidelines) on behalf of the Association. The Board of Directors is also empowered to set various rules, regulations, and policies, which the Manager is obligated to carry out on its behalf. In other words, the Association documents and the Board of Directors sets policy, and the Manager carries it out. This implementation of policy includes administrative, financial, covenant enforcement, informational and communication duties:

As the HOA expert, the Manager provides timely educational leadership to Board volunteers in carrying out their responsibilities to their community. This could take the form of guidance in handling specific situations; providing educational literature regarding Board responsibilities, protocols, and the law; arranging for Board trainings; perhaps even intervening when becoming aware that the Board is stumbling.

Management Services-Administrative

- Managing Agent shall coordinate and attend the annual meeting of the members, provide information packages as directed by the Board of Directors and take the minutes of such meetings.
- Managing Agent shall coordinate and attend 4 meetings per year of the Board of Directors, provide information packages for the meeting as well as the minutes from each meeting, and execute the decisions made at such meetings.
- Managing Agent shall file the Arizona Corporation Commission report and act as statutory agent if desired by the board.
- Managing Agent shall acquire and maintain insurance on behalf of the Association as directed by the Board of Directors and/or governing documents.
- Managing Agent shall be responsible for all Association books, records, and papers necessary and proper for performances of its duties.
- Managing Agent shall negotiate and present all contracts to the Board of Directors for execution.
- Managing Agent shall work with all Board of Director appointed committees to ensure smooth operation of the Association.
- Prepare and distribute up to 2 Association newsletters per year (if requested by the Board).

Management Services-Accounting:

- Establish and maintain a checking account in the name of the Association to be used for all association related banking.
- Establish a general reserve account, separate from the Associations operating account as directed by the Board of Directors.
- Send out all notices of HOA dues, monthly, including any late notices.
- Collect and deposit all dues and enter all transactions in accounting system.
- Implement collection procedures for all Annual Assessments, Special Assessments, Maintenance Assessments, interest, and all other monies due to the Association.

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- Enter and pay all monthly bills for the homeowner's association.
- Prepare financial package for Board of Director Meetings.
- Draft the annual budget for the Association to include reserve goals as established by the Board of Directors or professionally performed reserve study.
- Assist an accountant retained by the Association to prepare tax returns, audits, compilations, or reviews by providing such Association records as may be necessary for such purposes.

Management Services-Communications/Human Relations:

- Respond to all homeowner communications dealing with all aspects of the HOA within 24 hours, Mon. through Friday.
- Provide each new member with the available welcome materials and a letter of introduction from the managing agent.

Management Services- Maintenance:

- Oversee all contracted services as directed by the Board.

Management Services-Enforcement & Design Review:

- Every other week site visits to review common areas.
- Every other week drive thru review of all completed and constructed homes within the Project to determine if any violations of the Design Guidelines, CC&R's or other requirements exist.
- Notification and follow-up, as directed by the Board of Directors and or Board approved compliance policy, to bring all violations discovered during tours to resolution.
- Process architectural submittals and communicate decisions made.

• The Manager helps to carry out the policies of the Association. Other policies also involve rules and regulations within the community which might be as simple as notifying a homeowner regarding the payment of dues, addressing a particular rule about conduct, parking, or animals, etc. Simply stated, it is the Manager's duty to notify the owner regarding conformance with rules and regulations on behalf of the Association, and to follow up on compliance. This process may also involve assessing fines. The Manager in this process is often viewed as the rule-maker or viewed to be one who carries all the authority. This can be one of the more challenging parts of the job.

• The Manager responds to communications from homeowners regarding a wide range of topics from inquiries regarding trash pickups, pool hours, new keys, architectural and/or landscape modifications requests, and sometimes angry communications that might relate to a neighbor, pets, maintenance or even the Manager his/her-self. This homeowner contact takes up a large portion of the Manager's involvement in the Association.

• The Manager keeps up to date on annual amendments to the Condominium and Planned Communities Act and informs the Association to these amendments, underlining those that are pertinent to each specific Association.