

Community Association Manager's Role

The role of a professional community association manager is to provide information, training and leadership on community association operations to the board, committees and the community at large; foster a sense of community awareness and spirit with residents; develop a body of leadership through the committee structure; provide necessary administrative tools to the board to enable it to make wise, informed decisions on both short-term and long-term actions and goals by performing some but not limited to the following:

- ❖ Answer all phone calls/emails from owners and assist in problem solving efforts
- ❖ Answer all phone calls/emails from vendors performing services in the community
- ❖ Create and track work orders in accordance with the governing documents
- ❖ Inspect the community and send notices of violation in accordance with the governing documents
- ❖ Assist with the architectural application process for board approval/denial
- ❖ Send welcome letters to new home buyers in a community and provide the necessary information for paying assessments
- ❖ Assist title companies and lenders with escrow information necessary for closings and/or refinance
- ❖ Create and assist the boards with direct mailings for meetings and community updates
- ❖ Collection of assessments
- ❖ Pay invoices and send appropriate 1099 information at year end to vendors
- ❖ Prepare monthly financial reports
- ❖ Assists the board with budget preparation, budget notices and coupons/statements
- ❖ Prepares and sends delinquency notices
- ❖ Liaison with the association attorney and/or collection agency on all collection matters
- ❖ Liaison with the CPA for the preparation of the association tax return(s)
- ❖ Liaison with CPA for audit preparation
- ❖ Meets with the board either monthly or quarterly which is outlined in the management agreement
- ❖ Prepares board meeting agenda and the board meeting packet with the assistance of the board president
- ❖ Records the meeting minutes if the Secretary is unavailable
- ❖ Coordinates the annual owner meeting
- ❖ Coordinates any special owner meeting
- ❖ Requests bid proposals for lawn maintenance, pond maintenance, pool maintenance, clubhouse maintenance, exercise equipment maintenance, flowers, painting, insurance, preventative maintenance as needed and any capital projects
- ❖ Provides vendor contracts for signature by the board after a bid has been approved by the board
- ❖ Supervises executed contracts for an association
- ❖ Liaison for reserve studies
- ❖ Educates and trains boards to keep them up to date with changing laws and practices
- ❖ Liaison with insurance companies to evaluate risk potential and coordinate efforts in the event of a loss
- ❖ Acts as the agent for any legal matters on behalf of the association

Here are some things that are not part of the professional community association managers role:

- Hiring contractors/employees and signing community association vendor contracts
- Vote at meetings
- Breach the competitive bid process
- Turn a grass cutter into a professional landscaper
- Babysit contractors (unless project management applies and is stipulated by contract)
- Communicate with every board member or every owner every day
- Immediately return email or telephone call(s) – they are prioritized
- Accept verbal abuse from owners and/or board members
- Waive late fees, violation or misc. assessments without board approval
- Establish, adopt and/or amend the governing documents
- Set policy, standards, procedures, programs and/or determines the operating budget for the community association
- Knock on doors to discuss violations
- Take sides when a neighbor to neighbor disagreements erupts
- Referee board member vs board member dispute(s)
- Handle police matters and enforcement thereof
- Act as a collection agency on Fair Debt Collection Practices Act (FDCPA)