

HOMEOWNERS' ASSOCIATION MANAGEMENT: A LOOK BEHIND THE SCENES

When you sit down to write out that check for the membership dues to your homeowners' association, you probably ask yourself this question: "What am I getting in return?" Well, it is our hope that this pamphlet will provide you with some good information in an effort to answer that very question.

As an analogy, think of your subdivision as a mini-city. The mayor and city council are charged with providing a city with effective leadership, a sense of direction, its policies, initiatives, and its goals and objectives. The Board of Directors for your homeowners' association is your city council. Like municipal city council members, for the most part, your elected Board of Directors serve the association while also devoting themselves to full-time careers in other areas of endeavor. As a result, they simply do not have the depth of experience or the amount of time needed to guide association operations on a day-to-day basis.

At the municipal level, employing a highly qualified City Manager solves that problem. It's the City Manager's Office that is responsible for providing the day-to-day direction and leadership for the effective administration and operation of municipal services. Likewise, homeowners' associations can solve this problem by employing the services of a community association manager. Just as the City Manager's Office receives its charge and authority from the City Council, an association manager receives a charge and a corresponding level of authority from the Governing Documents and the Board of Directors. In accepting that charge, the association manager tackles a considerable scope of responsibilities. Many of these tasks, although on a smaller scale, closely parallel those found in various municipal offices. Listed within this pamphlet are some of the critical management functions that are performed by Association Management Services and your specific association manager. AMS provides services to more than 175 communities and all may not be applicable to your specific association based on your community's amenities.

Effective professional association management teams such as Association Management Services (AMS) have the specific knowledge and diverse abilities to perform the many services Associations may require. AMS works for the Board of Directors – the Board makes policy and AMS carries out its duties in support of these policies.

Financial Management

- Risk management
- Asset protection
- Assessment billing and collection
- Accounts receivable
- Delinquent account processing
- Financial forecasting/analysis
- Reserve fund allocation
- Association taxes
- Budget preparation
 - Mandatory line items
 - Discretionary line items
- Reconciliation of income/expenses
- Verification of services rendered
- Accounts payable
- General ledger posting
- Monthly financial reporting
- Title company liaison activities
 - Resale Certificates
 - Transfer Fees
 - Pro-ration of Dues
- Contracting
 - Bids
 - Insurance, permit compliance
 - Quality assurance



Legal Aspects

- Association attorney liaison activities
- Regulatory compliance with federal, state, and local statutes
- Management of governing documents
 - Articles of Incorporation
 - Bylaws
 - Declaration/Master Deed
 - Board resolutions
- Policing & enforcement of Board rules & restrictions
 - Architectural guidelines
 - Deed restrictions
 - City codes
 - Applicable state laws
- Facilitate due process adherence
- Facilitate dispute resolution

Facilities Management

- Safety inspections
- Preventative maintenance
- Corrective maintenance
- Repair/replacement program
- Pool use/access
- Club house use/rental
- Gated community access gates
- Initiative planning
- City liaison



Community Management

- Incoming and outgoing mail processing
- Current register of lots/owners
- New homeowner orientation packet
- Routine property inspections
- Committee coordination
- Board meeting facilitation
 - Planning and preparation
 - Professional guidance
 - Documentation
- Strategic planning (short/long term)
- Communication
 - Response to homeowner concerns, suggestions, etc.
 - 24-hour emergency contact
 - Newsletter coordination, printing, distribution

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A Look Behind The Scenes



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