



The professional management team advantage

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## MANAGEMENT SCOPE

The Association Board and the Membership decide on the Association's policies, programs and budget. But somebody must make it all happen. That somebody is management . . . specifically the Association Manager. Whether called Property Manager, Association Manager, Management Agent or something else, the manager is the one who must turn the policy and program decisions into operating realities.

To understand why management is so important – why, in fact, it can make or break a community – consider the scope of things that the manager must get done, either directly or through volunteers, employees or contractors.

1. **Environment** – The Association Manager sees to it that:

- ❖ the Association's architectural control and standards are administered to create and preserve a quality living environment for the members and other residents;
- ❖ the Association's Rules and Regulations on property use are enforced to maintain the quality of the living environment and to protect property values;
- ❖ the Association's arbitration matters are handled properly.

2. **Property** – The Association Manager sees to it that:

- ❖ the common properties and its components involving association responsibility for maintenance, such as roofs, driveway surfaces, pool finishes, equipment and the building exteriors are inspected periodically;
- ❖ necessary maintenance, repair and replacements for such properties are performed correctly and when needed;
- ❖ the Association's property is kept in compliance with the requirements of laws and ordinances.

3. **Service** – The Association Manager see to it that the services received by the Association are performed adequately and on a timely basis, such as:

- ❖ general, janitorial, swimming pool and landscaping maintenance services;
- ❖ trash and garbage collection;

- ❖ security guards and patrols;
- ❖ cable television service;
- ❖ pest control

4. **Communications** – The Association Manager sees to it that:

- ❖ innovative ideas and pertinent information are presented to the Board and to the homeowners
- ❖ interaction occurs between the various appointed committees of the association;
- ❖ real estate sales people have appropriate buyer information about the Association
- ❖ all owners have appropriate resident information about the Association in the form of Rules and Regulations, etc.;
- ❖ Annual Membership Meetings are announced and conducted effectively;
- ❖ annual reports are written and distributed;
- ❖ cooperative relationships are maintained with nearby civic associations, the business community and governmental agencies.

5. **Finances** – the Association Manager sees to it that:

- ❖ annual operating budgets and reserves for capital improvements and replacements are prepared for Board approval;
- ❖ assessments, user fees and other receivables are collected, including action on delinquencies, and properly deposited;
- ❖ checking, investment and other accounts are set up, maintained and reconciled;
- ❖ Association disbursements are made with budgets and corrective action is suggested to the Board when advisable;
- ❖ financial statements are prepared;
- ❖ income-expense comparisons are made with budgets and corrective action is suggested to the Board when advisable;
- ❖ an independent audit and the tax reports are prepared and processed at fiscal year end.

6. **Administration** – The Association Manager coordinates all the Association management concerns. The Association Manager also sees to it that general administration services are adequately provided, such as:

- ❖ review condominium documents for such items as resale notification provisions, annual assessment increase guidelines, usage restrictions like leasing and time-sharing and pet policies;
- ❖ emergency call service, 24 hours a day, seven (7) days a week;
- ❖ general correspondence;
- ❖ development and administration of an executive complaint procedure;
- ❖ record keeping of legal documents, constructions plans, ember rosters, financial statements, contracts, annual reports, minutes, etc.;
- ❖ meeting arrangements and other administrative assistance for officers, the Board and committees;
- ❖ development and administration of an effective volunteer leadership program including recruitment, orientation, consultation and assistance;
- ❖ development and administration of an appropriate contracting procedure covering invitations, bid analysis, negotiation, contracts, monitoring, inspection and payment;
- ❖ development and administration of an effective personnel employment procedure including recruitment, training, supervision, payroll, etc.

7. **Liability** – The Association Manager helps the board protect the interests of the Association and its people by advising and assisting the Board in its arrangements for:

- ❖ liability and damage insurance on the common property;
- ❖ director's and Officers' liability insurance;
- ❖ taxes on the Association's taxable income;
- ❖ services of the Association's accountant/auditor, attorney and association consultant.

8. **Policy** – The Association Manager assists the Board in its deliberation on and the execution of such Board policy decisions as:

- ❖ adoption of a general management plan;
- ❖ adoption of standard operation practices;

- ❖ determination of assessment amounts;
- ❖ award of contracts;
- ❖ selection of an accountant/auditor, attorney and an association consultant.

Since Associations have various needs, some of the specifics here are only illustrative. A manager may not have all these duties. He or she may have other tasks to perform too, and management activities may be grouped in other than the eight (8) divisions here.

Without question, Association Management is concerned with a lot of things and at several levels. The board sets policy, programs and budgets for management to carry out. The Association Manager, as outlined above, is concerned with all of it . . . from the viewpoint of seeing to it that it all gets done. Depending on the association and its management system, the Association Manager may be a volunteer President, or in-house salaried Association Manager, or an outside Professional Management Company such as **Advantage Property Management LLC**.