



Quest for Better Association Management

**Needs
February 20, 2021**

What Services Do We Need?

- Managing Current Owners/Renters
- Managing New Owners
- Managing Finances
- Managing Assets
- Managing Communications
- Managing Meetings
- Managing Employees
- Managing Emergency Situations (24-7)
- Managing Association Equipment
- Managing Licenses, Fees, & Permits
- Managing Annual Contracts
- Managing Maintenance Projects
- Managing Legal Issues

Managing Current Owners/Renters

- Maintaining Owner/Renter Records
- Publishing Owner Directories
- Answering Owner Queries
- Managing Dues Payments
- Enforcing Bylaws, Rules & Regulations
- Managing Complaints
- Managing Modification Requests
- Managing Work Order Requests

Managing New owners

- Responding to Realtor Queries/Applications
- Performing Security Checks
- Maintaining Orientation Material
- Providing Orientation to New Owners/Renters
- Managing Renters

Managing Finances

- Operating Budget Development
- Reserve Budget Development
- Managing Bank Accounts/Investments
- Writing & Signing Checks
- Tracking & Reporting Monthly Income/Expenses
- Tracking and Adjusting Reserves
- Filing Income Taxes

Managing Assets

(Buildings, Grounds, Landscaping, Pool, Clubhouse)

- Developing Preventative Maintenance Plans
- Performing Preventative Maintenance
- Monitoring Condition of Assets

Managing Communications

- Maintaining Association Website
- Printing, Copying, and Mailing Owner Communications
- Monitoring the Association Email Account
- Meeting with Building Reps

Managing Meetings

(Annual, Regular, & Special Board, Committee,..)

- Scheduling Meetings
- Generating Meeting Notices
- Hosting Meetings
- Managing Electronic Voting
- Conducting Elections

Managing Employees

- Assigning Work
- Tracking Performance
- Tracking Hours
- Setting up & Running Payroll
- Performing Workman's Comp Audit

Managing Emergency Situations

- Providing 24/7 Access
- Implementing Immediate Mitigation
- Following Up with Permanent Mitigation

Managing Association Equipment

(Office Machines, Rec Hall Audio/Video, Kitchen Appliances, Maintenance Shed Tools & Equipment, ...)

- Ensure Equipment Performs Properly
- Perform Preventative Maintenance
- Order Supplies
- Contract for Repair/Replacement

Managing Licenses, Fees & Permits **(Corporate, Pool, Elevators)**

- Obtaining Required Inspections
- Filing Appropriate Forms
- Tracking Approvals
- Posting Licenses as Required
- Obtain Annual Property Appraisal

Managing Annual Contracts

(Insurance, Waste/Water, Landscape, Fertilizing, Tree Maintenance, Elevators, Pool, Office services, Laundry Room...)

- Writing Specs
- Soliciting Bids from Prospective Contractors
- Evaluating Bids
- Recommending Contractor Selection
- Ensuring the Work is Done Satisfactorily
- Approving Invoices
- Paying Contractors
- Maintaining Records

Managing Maintenance Projects (Pest Control, Plumbing, Electrical, Concrete, Painting, Roads & Parking, etc.)

- Writing Specs
- Soliciting Bids from Prospective Contractors
- Evaluating Bids
- Recommending Contractor Selection
- Communicating with Affected Owners
- Ensuring the Work is Done Satisfactorily
- Approving Invoices
- Paying Contractors
- Managing Change Orders
- Maintaining Maintenance Records

Managing Legal Issues

- Foreclosures
- Lawsuits
- Board Liability
- Emotional Service Animals
- Pandemic