Association Manager

Job Responsibilities

**Daily-Weekly**

Post Office

E-mails

Return phone calls-answer questions, input, etc.

Post payments-deposit

Write checks - Get board signatures-mail - twice monthly

**Monthly**

Board Meetings Schedule-forward Minutes & Agenda to Board

Put together Agenda

Forward notice & Agenda to website for posting-minimum 3 days prior

Prepare documents for meetings; put together board folders, board review docs

Attend meeting - take Minutes-transcribe

Bank Statements Reconcile with checkbook

post money market interest

Back up and close month - CBS

Send bank statements & monthly report to accountant-in time for monthly board meeting

Yard of the Month April through December

Verify with committee account not delinquent or deed violations

Purchase gift cards and send out to monthly winner - keep listing

Christmas- 3 awards

Newsletter Create monthly newsletter/flyer

Forward to website for posting

**Quarterly**

Database Update CBS and excel for owners & investors

Forward to website for posting

Accounting Create quarterly document that shows budget and budget versus actual for the quarter and year to date

Forward to website for posting on portal

**Ongoing**

Resale Certificates Provide resale certificates and attachments for properties when requested from the title company

Verify amounts due, liens, etc.

Update Balance Sheet monthly

Forward to title company

If liens - create releases after proceeds received and send for recording

Welcome Letters When funds are received from title company send out letter and enclosures

Update databases - CBS and excel

Dues Verify accuracy of any checks received

Post to account on CBS

Deposit

Post Zelle accounts - notices e-mailed from Prosperity

Answer any owner questions

Monitor payment plans

Late accounts - post late charges

Create and send 30-day demands - regular and certified

Create and file Liens if not paid

Post lien fees to accounts

If paid, create release and send for recording

**Annual**

Annual Assessments Update databases

Invoice all owners on CBS system, review statements, print and mail

First week of January time frame for mailing

Owner’s Meeting Work with Board to schedule meeting date-end of January time frame

Reserve location and date

Create and mail out meeting notice and ballots and proxies-minimum 10 days advance notice to all owners

Forward notice and ballot to website for posting

Prepare all financial information from prior year-budget, budget vs. actual and new budget - board to review, revise and approve final

If refreshments are to be served, order and either pick up or have delivered

Copy financial information, ballots and all other hand out information

Create sign in sheet for owners

Chair meeting

Present financial information at meeting-answer any questions

Assist with answering owner questions if needed

Create newsletter/flyer for website with all meeting information and forward to website for posting

**Sports Center**

Guards & Training Determine if Bonney Maurer will hold certification and & re-cert classes, interview and swim test guard applicants and make hiring recommendations

Recruit Guards - e-mail to all old guards from prior year

Work with Bonney to schedule classes, interviews and testing

Check with Earl - schedule classes for training-pump house, chemicals, tabs & shock for guards

In-Service Schedule - every other week for summer-attendance mandatory-if not guards need to do make up supplied by Bonney

Guards Send application and job descriptions to all applicants

Once hired - download W-4, I-9 forms, key receipt, and vacation requests

Get all required copies and documents for each guard

Order - suits, t-shirts, lanyards, whistles

Guard Schedule Prepare weekly guard schedule a week in advance with adequate coverage for open times, parties, events. Week runs Monday AM until Sunday PM

Vacation request cutoff is Monday at 5. Schedules prepared Tuesday, posted and e-mailed Wednesday. Master schedule posted in guard shack

Schedule switches are up to individual guards - must be initialed and changed on master schedule posted in guard shack

Guard Payroll Cut off end of last day of the month and the 15th

Program time cards with Time Trax system (PTI & ADMIN - user and password)

Order new cards when needed

Time cards to be kept in guard shack

Hang up time clock in guard shack

To download punches - bring time clock into office-phone-type jack in back of time clock - then connect to USB oncomputer, log in, download punches

Review missing - edit based on weekly schedules-print report

Set up payroll on CBs for each guard

Input hours from Time Trax report, print checks, get board signatures and distribute

Swim Lessons Determine who is interested and qualified to teach

Only scheduled through Association Office (insurance requirement)

Four years old minimum - no Mom and me available

Liability Releases and payment envelopes in tennis shack -guard responsible for scheduling lesson times and collecting payment

Separate checks to guards for lessons-80% of fee paid to guard

Supply forms and payment envelopes kept in the log as needed

Set Up Review and order re-stock, inspect, etc. as needed

Rescue Tubes

Ring buoy and throw rope

Rope divider with floats - deep end

All signs

911 Phone & emergency information sign

Combination locks for pump house and guard shack

Cleaning supplies for Monday maintenance

First aid supplies

Guard supplies - water, ice pops, and etc.-order and pick up - ongoing all summer

Fire extinguisher inspection

Inspect pool furniture - if need to be re-purchased need Board approval for cost

Schedule start up maintenance with guards - clean tennis and guard shacks, pump house, frig, cubbies, etc.

Update and supply daily cash envelopes to be kept in cash box at guard table

$50 daily start-up money

Check cash box for the envelopes- cash, membership forms and fees, etc.

Key System Inventory number of keys available -order more if needed

Re-set time zones

Once liability form is signed and/or last 5 digits of existing key is forwarded, program or re-activate keys

Forms Create and get board approval for master SC membership application

Update Key Liability Release and any other forms

Keep supply in office and at the guard table and shack

Update bulletin board at sports center

Update calendar and forward to website and post on bulletin board

Member Sign In Log Create and update weekly based on membership-every Monday

Chemical Logs Create and update supply kept in pump house.

Post daily checking time schedule and monthly date calendar in pump house

Check MDS to make sure it is updated

File completed forms in the office

Accident & incident keep supply updated

Maintenance Update daily AM and PM and Monday Maintenance forms as needed

Keep supply in binder in tennis shack

Parties Schedule parties and events -add to guard schedules

Create and post party notice for guard shack along with Party Greeter card for the guard assigned

Collect deposit at booking and remainder of fee in advance of party

Association Manager-job description #1.docx

11/27/2023