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