

Job Description - HOA Assistant

1/16/2023

1.0 Introduction

The purpose of this standard procedure is to establish and define the functional role, requirements, reporting relationships, authority, responsibilities and measurements of performance of the Homeowners Association (HOA) Assistant position at Advanced Property Management, Inc.

2.0 Functional Role

The primary function of the HOA Assistant is to assist the management of all operations, vendor services, and administration of the Homeowners Associations, with the assistance of the HOA manager, which Advanced Property Management has contracts with.

3.0 Requirements

3.1 Education

Required: High school diploma or GED equivalent

Preferred: Additional related coursework, preferably in business administration and or accounting.

3.2 Experience

Preferred: Minimum of 1 year hospitality or office management experience.

3.3 Knowledge & Abilities

1. Understanding or working knowledge of Homeowners Associations
2. Ability to provide excellent customer service to clients
3. Assertively deal with Bylaws, Covenant violations and confrontation appropriately
4. Knowledge of Fair Housing Act, Open Meetings Act and Kansas State Statutes
5. Attention to detail
6. Written and verbal communication skills
7. Computer skills and experience including Microsoft Office, Google Docs, Google Sheets, Appfolio Software, Online social networking.
8. Ability to compose documents with proper grammar and punctuation
9. Time management
10. Willingness to learn

3.4 Mental Capacity

Ability to sustain sharpness and professional bearing and to foster a positive business image. Ability to problem solve and make decisions quickly. Normal ability to concentrate, normal memory, taking into consideration the amount and type of information.

3.5 Physical Capacity

1. Normal Physical mobility, which includes movement from place to place
2. Normal physical agility, which includes the ability to maneuver the body
3. Able to lift and move up to 20 pounds
4. Normal dexterity of hands and fingers

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5. Normal coordination, including eye-hand-foot
6. Sufficiently corrected vision for reading written documentation and drive a vehicle
7. Must be able to hear adequately with correction
8. Must be able to ascend/descend staircases, uneven or rough terrain in yards

3.6 Working Conditions

Work occurs primarily in the office environment and HOA neighborhoods. Requires HOA Assistant to drive their personal vehicle for business matters (Mileage reimbursement.)

4.0 Reporting Relationships

The HOA Assistant reports to the HOA Manager. In the HOA Managers absence, then the HOA Assistant reports to the Office Manager. Assistant works in conjunction with each HOA's Board of Directors.

5.0 Authority

1. The HOA Assistant has the authority to manage the HOA management activities of the company according to Advanced Property Management's policies and the HOA Boards of Directors directives.
2. Coordinate with HOA property owners, Board members, and vendors regarding HOAs managed by the company.
3. Network with community members and businesses as a representative of the company.

6.0 Duties and Responsibilities

1. Assist with all operations, vendor services, and administration of Homeowners Association.
2. Review their personal and HOA manager calendars and determine what planning is required for day, week and month.
3. Answer telephone in a friendly manner and in such a way that communicates interest in their needs.
4. Perform inspections of neighborhoods, as needed. Weekly, drive to neighborhoods using personal vehicle, pick up trash, remove unwanted signs, monitor for maintenance needs and compliance of Bylaws and Covenants.
5. Assist in preparation of annual and monthly statements to appropriate HOA members. Assist in collection of annual and monthly dues and related HOA income collection tasks. Assist with entering payments into the Appfolio system. Prepare bank deposits and take them to the appropriate bank.
6. Follow-up with owners regarding delinquent dues. Assist with the collection process per each HOA's policy.
7. Obtain, read and become familiar with HOA Bylaws and Covenants.
8. Edit database as new owners move in/out of neighborhoods. Research County GIS to identify ownership as needed.
9. Attend HOA Board Meetings and Owners' meetings. Assist with preparation of Agendas, taking minutes, writing of minutes.
10. Assist with monthly financial preparation to be sent to each Treasurer.
11. Assist with management of all vendors used in each HOA (i.e. lawn management, snow removal, trash services, utilities, maintenance, etc.)

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12. Assist with AR & AP associated with vendor expenses. Prepare invoice payment checks and obtain HOA Treasurer's signature.
13. Handle complaints, issues, and problems that may arise from homeowners and non compliance issues as they arise.
14. Prepare and send welcome letters to new homeowners in each association.
15. Assist with preparation of each quarterly newsletter and any other appropriate communication to send to each homeowner after receiving approval from appropriate Board members.
16. Check voicemails, texts and emails throughout the day and respond accordingly.
17. Effectively communicate and share information with APM team members.
18. Maintain client confidentiality regarding all matters of business.
19. Assist in other HOA specific duties as they arise
20. Adhere to APM's Core Values - We, Innovative, Honesty, Quality, and Responsiveness.
21. Other duties and responsibilities as needed or assigned by HOA Manager or other members of management.

7.0 Measures of Performance

1. Adherence to APM's Core Values - We, Innovative, Honesty, Quality, and Responsive.
2. There were no significant errors of complaints from HOA Board of Directors due to failure to complete terms of Management Agreements.
3. There were no significant errors in accounts payable or receivables.
4. Attention to detail and accuracy was maintained in all matters of performance.
5. There were not warranted complaints against the HOA Assistant because of rudeness, inefficiency, discrimination, or failure to follow local, state and federal laws.
6. There were no breaches in confidentiality.

8.0 Acknowledgements

I have reviewed and understand the above job description and believe it to be accurate and complete.

HOA Assistant

Date

HOA Manager

Date