

A photograph of three people in a meeting. On the left, a man in a light-colored suit jacket is looking towards the center. In the middle, a woman with curly hair and glasses is smiling and looking at a document. On the right, a man with a beard and glasses is smiling and looking towards the center. They are sitting around a table with laptops and a coffee cup. The background is a bright, modern office space.

What to Expect from an HOA Management Company

A HOMEOWNER'S RESOURCE



KEYSTONE

Your homeowner’s resource for what to expect when working with an HOA management company, tasks handled by the company, and tools they provide to save you time.

Contents

- Setting Expectations for Your HOA Management Company 4**
- The management company is an agent of the HOA 4
- Review your management contract 5
- The management company is a resource for homeowners 5
- A manager’s time is not unlimited 6
- Improve access to information by utilizing tech resources 6
- Define the gaps in service 7
- Expectations will evolve over time 7

- Tasks Handled by the HOA Management Company 8**
- Administrative Support 8
- Advisory Services 9
- Ongoing Maintenance 9
- What do managerial duties look like in practice? 10
- HOA Member Portal 13
- HOA Board Portal 14
- Technology Is No Substitute for Quality People 15

The best relationships between Homeowners' Associations (HOAs) and the management companies they employ are based on open communication and clear expectations.



However, if you're not exactly sure what your management company should be doing for your association, it can be difficult to determine if you're getting the full value of your service agreement. In this resource, we take a look at what you can expect from your HOA management company, the types of tasks they manage, and the tools they provide to community members.

Setting Expectations for Your HOA Management Company

Here's how to set appropriate expectations with your management company – and why it's important. evolving to better serve homeowners living in a community:

The management company is an agent of the HOA

In legal terms, your HOA management company is an “agent of the corporation (your association).” This means the management company is a hired third party, responsible for acting on behalf of the association.



Keep in mind: The management company has no authority to make decisions on behalf of the association unless authorized through the management contract or by the Board of Directors.

Ultimate decision-making is the responsibility of the board. Once decisions are made, the management company is then tasked with carrying out those directives on a day-to-day basis.

That said, **part of the management company's responsibility is to provide the association with business advice and best practices guidance.** This can include everything from maintenance advice, long-term planning, budget planning, vendor selection and more.

Review your management contract

Along with providing advice to the board, the management company is tasked with carrying out the board's directives and handling administrative tasks for the association on a daily basis. To understand exactly what that entails for your association, board members should review the management contract.

The contract will spell out exact details as to what is included as part of the service agreement. Most agreements are explicit and detailed. However, as communities grow and evolve, their needs change. We recommend reviewing your management company service agreement the quarter after every board member election. This enables you to evaluate if the type and frequency of service you receive from your management company is meeting your community's needs and expectations. If not, start a discussion with your manager about taking steps to amend the agreement.



The management company is a resource for homeowners

While the management company primarily works with the HOA board, managers are also valuable advocates for homeowners. If a homeowner has an issue with the association, the manager will try to remedy the situation or help the member go through the proper channels to address the matter with the board.

The manager and management company are not “on the board's side.” They are on the side of the success of the association as a whole.



A manager's time is not unlimited

When you hire an HOA management company, part of what you're paying for is your manager's time and expertise. However, unless you have a full-time, dedicated onsite property manager, your manager is likely splitting their time with other clients.

Managers are skilled at time management and ensure your community's needs are a top priority. If you are finding that your community requires more attention than you are currently receiving, bring up this topic with your manager. They will add it to the agenda to your next board meeting to initiate the discussion.

If your community requires an increased level of manager involvement, you may need to amend the agreement with your management company. You may need to consider allocating more resources to increase the number of hours your manager dedicates to your association.



Improve access to information by utilizing tech resources

Many homeowners want quick and easy answers to basic questions without having to contact the manager. Using today's tech resources – like the community's website, e-blast communications, board portal, member portal, social media channels and online groups – provides two-pronged value: it helps members quickly obtain important information, and it frees up your manager to focus on issues requiring more of their expertise. If your association isn't taking full advantage of technology, it's time to start putting these solutions into place.

Define the gaps in service

A solid working relationship between association and management company is all about expectations: what you believe you should be receiving compared to what your management company is providing. If there is a consistent divide, don't rush to cancel your contract and hope for the best somewhere else. Sit down with your management company and board and clearly define the gap. Stronger communication results in stronger partnership.



Expectations will evolve over time

The relationship between HOA and management company changes as the community evolves. Don't be afraid to re-define expectations – or share positive feedback about what's working well. Your HOA manager and the entire management company backing them want to exceed your expectations. Being upfront about what you want and checking in regularly are the only ways to get there.



Tasks Handled by the HOA Management Company

The duties of HOA management companies generally fall into three broad categories:

→ administrative support

→ advisory services

→ ongoing maintenance

Administrative Support

The efforts of a community manager should make things easier for board members to show up to meetings and make speedy, informed decisions in the best interest of the association. Remember, HOA boards of directors are usually comprised of a group of dedicated volunteers. In addition to overseeing the association, they have busy careers and personal lives, too. The community manager handles time-consuming tasks so the board can focus on high-impact decision-making.

With additional behind-the-scenes support from the entire HOA management company, managers are responsible for daily administrative items such as:

- Recording and distributing board meeting minutes
- Facilitating board meetings
- Managing contracts with vendors
- Assembling vendor due diligence
- Managing HOA correspondence and communications
- Paying bills
- Collecting and depositing assessments
- Planning and executing board-approved community events

Advisory Services

Though HOA management companies refer the board to the association's attorney for legal advice, managers can provide guidance on most other matters, including:

- reserve allocation
- current trends in amenities
- vendor comparison
- planning for capital improvements
- community-building activities
- developing the community's long-term strategic plan

Over time, most boards learn to trust their management company's expertise, thus increasing the efficiency of operations overall.



Ongoing Maintenance

The community manager provides a “boots-on-the-ground” presence on behalf of the board. Managers conduct regular inspections of the property to make sure common areas are in good working order and members are abiding by the association's rules and regulations. They also handle the day-to-day communications and coordination with vendors, both for standard maintenance contracts and special one-off projects.

As a time-saving measure, many boards pre-authorize their manager to oversee certain low-expenditure projects on their behalf, in place of requiring approval from the board every small task. They authorize the manager to handle minor items, such as repairing broken sprinkler heads, replacing lighting or overseeing simple plumbing repairs in common spaces.

The manager can provide a real-time balance sheet of expenses at board meetings and/or upon specific request from the board. Not all associations choose to grant this responsibility to their community manager – like all things, it's up to the discretion of each board of directors.

What do managerial duties look like in practice?

Though the amount of support HOAs receive from their HOA management companies may seem overwhelming, the reality is that this wide breadth of services fits seamlessly into day-to-day workflow.

Here's an example:



During a weekly walk-through, the community manager notices that the streets need to be re-sealed



ADMINISTRATIVE SUPPORT

The manager adds the topic to the next board meeting agenda

ADVISORY SERVICES

At the meeting, the manager shares bids and provides a recommendation for the vendor who fits the HOA's budget, timeline and service requirements



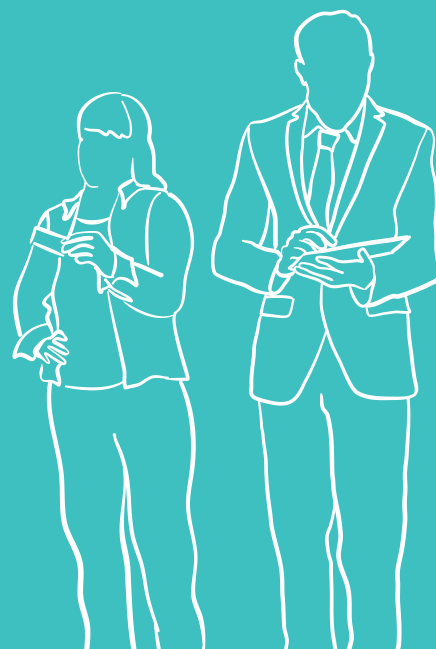
WHAT TO EXPECT FROM AN HOA MANAGEMENT COMPANY



ADMINISTRATIVE SUPPORT

After the board makes a decision, the manager is tasked with overseeing the contract and project execution

The extensive amount of responsibilities undertaken by community association management companies ultimately add up to a full-time job. All the tasks performed by management companies ladder up to a single, overriding objective: to protect the property values in the association and build a thriving, welcoming community.



3 HOA Management Tools that Save Time

HOA management has advanced by leaps and bounds in terms of the convenience and availability of useful technologies for management companies, HOA boards and association members. These tools provide greater access to information, facilitate easier communication and generate a never-before-seen level of transparency.

The following useful management tools make handling these details easier, saving you quality time to spend enjoying your neighborhood.



Community Website

Your community's website is an online resource providing instant answers to many of your most common questions about living in your HOA – and it's available 24 hours a day, 7 days a week. If you haven't looked at your community's website lately, take a moment to see what's there.

WHAT TO EXPECT FROM AN HOA MANAGEMENT COMPANY

Most community websites include:

- Community news and updates
- Amenities hours & rules
- Your HOA's governing documents (bylaws, CC&Rs, Rules & Regulations)
- Architectural forms & guidelines
- Event announcements
- Previous board meeting minutes (password-protected)
- Upcoming board meeting calendar
- Community manager/management company contact information



HOA Member Portal

Your association's member portal is accessible from your community website and enables you to manage specific aspects of your home as it relates to your HOA. Use the secure, password-protected member portal to handle administrative tasks that previously required a phone call, fax or trip to the post office.

Here are some of the items you can manage directly from your computer or mobile device via your member portal:

- Pay your assessments
- Review outstanding assessment balances
- Review your transaction history
- Update your contact information (email, phone number)
- Opt-in/out of e-communications, such as eBilling
- Check the status of your architectural application
- Review the status of a work order
- Review correspondence from the association, including violation letters and supporting documentation
- Submit a general request to your community manager

HOA Board Portal

Arriving to meetings prepared enables HOA board members to make decisions for the community thoughtfully and efficiently. The password-protected online board portal provides board members with a wealth of valuable, real-time information about the association.

While California state civil code stipulates many association documents must still exist in paper form, most HOAs choose to upload digital copies of these files to the board portal to help board members access information more quickly and conveniently.



Here are some of the key actions board members can take via their board portal:

- Review current violations
- Update the status of past violations
- Review delinquencies
- Review current and past work orders
- Review architectural applications
- Review vendor invoices
- Access governing documents
- Review past meeting minutes
- Access board packets for upcoming board meetings



Technology Is No Substitute for Quality People

At Keystone, we believe in the power of great people supported by great tech, not using technology as a substitute for human connection. While the time-saving tools above increase efficiency for board and association members, your HOA manager is always available to answer questions and provide help – and they're still just a phone call or email away.





Learn more about how the right HOA management partner benefits your community. Contact Keystone today and we'll show you what's possible.

Contact [us](#) today for a custom proposal from our HOA experts.

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