

HOA Officers and PH Stewards Reoccurring Responsibilities

(Info regarding HOA 9-18-2022 Agenda Item #3)

The President

- Shall preside at all meetings of the members and meetings of the Board of directors and have a general charge and supervision of the affairs of the Association.
- Primary spokesperson for communicating information as needed to ensure all association members are informed.
- Introduce the HOA to new residents and get the new homeowner's contact information (*Full Names, Mobile Phone Numbers, and e-Mail Addresses*). Provide them HOA other homeowners' contact information, copy of the HOA By Laws if needed, PH Key, answer any initial questions they might have, etc. Provide this new resident information to the Treasurer so that master contact sheet is updated.
- Initial point person for addressing non-routine items that arise thought-out the year, if any (*i.e., unexpected PH issues, homeowner questions, etc.*) or any special projects.
- Work with all other board members to make sure necessary tasks our being handled appropriately and in a timely manner.
- Delegate and/or establish a task group of directors and/or other members to handle and/or address special projects for the association.
- Work with the Treasurer and/or other Directors to generate and distribute annual invoices to the HOA member regarding dues/fees owned to the association.
- Perform as needed (*with/without other directors*) follow-ups with HOA homeowners for the collection of any outstanding fees that are past due. As well as generate any additional invoices as needed to any homeowner.
- Handle the annual HOA tax filing:
 - Take the paper work compiled by the Treasurer to the RKO tax preparer.
 - Retrieve the completed HOA filing papers from RKO.
 - Sign and mail with US Postal return receipt for HOA record verification.
 - Return folder to the Treasurer with all the papers, completed tax filing papers, and the US Postal return receipt papers including the green return card which will be added to the HOA Record Files.
 - Handle any other tax paper filings as needed.
- Additional duties and responsibilities for this officer position maybe add by the Board of Directors through-out the year as they are identified.

The Treasurer

- Shall have the custody of all of the funds, property and securities of the association.
- When necessary or proper, he/she may endorse on behalf of the Association for collection, checks, notes and other obligations, and shall deposit the same to the credit of the Association at such bank or banks or depository as the members may designate.
- He/she shall sign all receipts and vouchers, sign all checks of the Association, as well as promissory notes issued by the Association.
- He/she shall enter regularly on those books of the Association to be kept by him/her for the purpose, full and accurate account of all the moneys and obligations received and paid or incurred by him/her for or on account of the Association and shall exhibit such books/records at all reasonable times to any member.
- He/she shall, in general, perform all the duties incident to the office.
- Compile and generate the HOA financial summary report showing the HOA income statement and the month-over-month expenses paid and fees collected. This is provided at the HOA meeting and is available upon request at any time.
- Maintain the master HOA Members contact sheet and be able to provide copies as need to any member upon requests.
- Prepare the HOA tax filing folder with all the information needed for the RKO tax preparer company to generate the Association's Annual Tax Return. This folder is handed off to the HOA President to handle and oversee the completion, signing, and mailing of the tax filing in a timely manner.
- Engage and assist the HOA President and other board members with other affairs of the Association as needed.
- Additional duties and responsibilities for this officer position maybe add by the Board of Directors through-out the year as they are identified.

The Secretary

- Shall be present at and record the proceeding of the meetings of members and perform all other duties commonly incident to the office.
- Shall be present and record the proceeding of the meetings of the directors and perform such other duties as the Board of Directors may, from time to time, designate.
- He/she shall also serve as the Registered Agent for service of process and assist with all other annual HOA administration processes working with/without other HOA Board Members.
 - Work with other Directors to generate homeowner responsibility schedules (i.e., Common Land Mowing, PH Filtration Tasks, etc.)
 - Work with the HOA President to communicate any schedules of responsibilities to the homeowner members.
 - Administer the schedules by providing timely text reminders to each homeowner and request a homeowner text confirmation and completion date of scheduled tasks.
 - Raise any administration issues to all board members for assistance regarding completion of scheduled tasks.
- Engage and assist the HOA President and other board members with other affairs of the Association as needed.
- Additional duties and responsibilities for this officer position maybe add by the Board of Directors through-out the year as they are identified.

Other Elected Directors

- Shall make every effort to attend all meetings of the directors to help provide additional input of the affairs of the Association.
- Willingness to engage and assist the HOA President and other board members with other affairs of the Association as needed.
- Willing to be point person and able to take lead on any special association projects and work with other directors and/or an establish task group for the good of the HOA, if needed.
- Additional duties and responsibilities for this officer position maybe add by the Board of Directors through-out the year as they are identified.

Pump House Steward Duties

There will be two Stewards. One per each pump house.

This position of the HOA, is to help ensure our water stays safe.

This is for the entire calendar year.

- Be responsible to check pump house twice per month for leaks or other potential problems i.e., mice or rodents, water leaks, etc.
- Follow up to ensure chlorine solution is at proper levels and/or mentor scheduled Homeowner as needed with correctly administering filtration tasks.
- During winter months ensure PH heater is turned on and turned off in the Spring (warm seasons).
- Monitor number of bottles of Clorox available and let the directors know when additional needs to be purchased.
- Report to the HOA directors any deficiencies or problems.