

HOA Board and Member Roles

<https://www.associatedasset.com/hoa-resources/hoa-tips-blog/2023/5/1/hoa-board-member-roles/>

The Board of Directors is elected by association members to serve as their representatives and make decisions on behalf of the community. The Board is made up of several positions, each with specific roles and responsibilities. The Southern Bluffs Board also performs the role of a management company, dealing with day-to-day issues that affect the community and community assets.

The HOA Board of Directors plays a vital role in the functioning and success of a homeowners association. These *volunteer* leaders are responsible for various tasks, from setting and enforcing community rules and regulations to managing community finances and resolving resident disputes. They play a key role in ensuring that the community runs smoothly, that the interests of all homeowners are protected, and that the community remains a desirable and sustainable place to live. The Board is a critical component of any homeowners association, and their responsibilities should not be taken lightly.

For Southern Bluffs in particular, the Board as a Whole:

Oversees activities of HOA committees, both formal (ARC) and informal (Clubhouse).

Remains up to date on Colorado HOA policy by attending webinars and compliance trainings sponsored by DORA (Department of Regulatory Agencies) when necessary.

Duties and Responsibilities of Board Officers are described below taken from the SBHOA **Bylaws** (available at southernbluffshoa.com), but the descriptions include additional responsibilities performed by the current Board.

The President shall:

be the chief executive officer of the Association and, subject to the control of the Board, shall in general supervise and control all the business and affairs of the Association.

preside at all meetings of the Members and of the Board.

sign, with the Secretary or any other proper Officer of the Association thereunto authorized by the Board, deeds, mortgages, bonds, contracts or other instruments which the Board has authorized to be executed, except in cases where the signing and execution thereof shall be expressly delegated by the Board or by these Bylaws to some other Officer or agent of the Association, or shall be required by law to be otherwise signed or executed; and in general, perform all duties incident to the office of President and such other duties as may be prescribed by the Board from time to time.

Currently the President also:

- serves as the official contact person with government entities and with a variety of service providers, including but not limited to providers of landscaping services, fiber network connections, Clubhouse management, and repair services of many kinds. The President also works with the Board to develop meeting agendas, Board Letters, and the budget.

Vice-President shall:

in the absence of the President or in the event of his/her death, inability or refusal to act, perform all duties of the President, and when so acting, shall have all the powers of and be subject to all the restrictions upon the President. The Vice-President shall perform such other duties as from time to time may be assigned to him/her by the President or by the Board.

The Secretary shall:

- keep the minutes of the proceedings of meetings of the Members and of the Board in one or more books provided for that purpose; (now all available at southernbluffshoa.com but also on request)
- see that all notices are duly given in accordance with the provisions of these Bylaws or as required by law; (email and USPS notices of meetings, posting notices at mailbox, posting notices of arrears).
- be custodian of the Association records and of the seal of the Association and see that the seal of the Association is affixed to all documents the execution of which on behalf of the Association under its seal is duly authorized; (We have no seal that anyone knows of. Duties include guaranteeing that all documents to be made available to the public are posted on the website.)
- keep a register of the post office and email addresses of each Member which shall be furnished to the Secretary by such Member; (phone number also appreciated), and
- in general, perform all duties incident to the office of Secretary and such other duties as from time to time may be assigned by the President or by the Board.

Currently, the Secretary also:

- keeps the Board informed of Colorado Statutes, CCRs, Bylaws, and Responsible Governance Policies that govern its decisions and behavior.
- monitors the secretarysbhoa@gmail.com account, answering messages or forwarding as appropriate, sending out messages of convenience to members such as sightings of bears, lost cats, and found keys.
- drafts a variety of documents, pending review and revision by other Board members. These include the bi-annual letters from the Board to Members, correspondence with attorneys, and communication with members about a variety of issues.

The Treasurer shall:

- have charge and custody of and be responsible for all funds and securities of the Association;
- receive and give receipts for monies due and payable to the Association by check and deposit or cause to be deposited all such monies in the name of the Association in such banks, trust companies or other depositories as shall be selected in accordance with the provisions of these Bylaws; and
- in general perform all the duties incident to the office of the Treasurer and such other duties as from time to time may be assigned to him/her by the President or by the Board.

Currently the Treasurer also:

- collects all mail from the 801 Bluffs Blvd box assigned by the post office.
- collects all invoices and pays vendors accordingly by check or use of the debit card. All invoices with the corresponding payments are sent to the accountant monthly. The Treasurer is responsible for obtaining a W9 for all new vendors and maintaining 1099 compliance with the accountant.
- is responsible for working with the accountant to make sure all transactions are recorded appropriately. They review all financial statements and the general ledger detail created by the accountant for accuracy. They work with the accountant to ensure homeowners are invoiced properly for their dues.
- works together with the HOA Secretary and Accountant to maintain an owner list with current and updated information. This is done via a shared Google Doc that the persons listed above have access to.
- works with all title companies to report/release any liens and dues owed on behalf of the seller at the time of closing during a property sale.
- works with the accountant to make sure all DORA and SOS filings are completed on time.
- works with the Board or our legal firm to follow all compliance procedures for collections on homeowners in arrears.
- creates the annual budget and presents it to the membership for approval at the October meeting. The Treasurer presents the financial reports and standing at the February meeting. They also present any outstanding financial problems or areas of concern to the membership at either or both meetings.