



HOAMCO

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Community Association Manager Training Program – Arizona

Manager Name: _____

Date: _____

Properties: _____

Welcome to HOAMCO. The key to being a successful community association manager is to become knowledgeable about the business, follow-up with all issues presented to you, conduct yourself as a professional, not take negative situations personally, and care about each community you manage. Below is a training program that will take you through the first month as a community association manager. It is important to complete each item, even if it is not within your first month. Please send weekly e-mails to Stacy Maule or other appointed supervisor informing her of your progress. Further training sessions will be incorporated throughout the year to support you. Please know that the HOAMCO culture is extremely team-oriented. If you have any questions, don't hesitate to ask for help. We wish you the best of luck!



WEEK 1		
ITEM	ACTION	COMPLETION
Administrative		
▪ Employee packet	Human Resources Administrator – Kaline	
▪ Phone Lists/Supplies	Office Admin – Prescott- Glenda	
▪ Voice Mail/Ext Set up/Door Key & Alarm	Office Admin – As per office location	
▪ E-mail set up	IT – Chris Olsen	
▪ Copier/fax training	Office Admin	
▪ Association List	Office Admin	
About HOAMCO		
▪ Visit HOAMCO web site: HOAMCO.com	Explore the Site Employee Login: User name is “hoamco” Password is “HOAMCO23”	
Property-Specific Management		
▪ Read Master Notebook for each Association	*Located at work station (If you are not able to find notebook, see Stacy)	
o Board Meeting Contacts		
o Governing Documents		
o Annual Calendar		
o Assessment Schedule		
o Compliance schedule & Fine Policy		
o Subcontractor List & related RFPs and Bids		
Board Contact		
▪ Introduce yourself to board presidents and board members.	Make personal phone call to board presidents and introduce yourself. Follow-up with an email to all board members.	
Community Association Management (on HOAMCO Employee Site)		
▪ M-100 Book	Read Chapters 1-2	
▪ GAP Reports	Read GAP Report #1 – Association Management	

* If a master notebook is not available, start a notebook with the following labels: Annual Calendar; board contact info w/ terms of offices, Governing Docs, Fine Policy, Delinquency Schedule, Insurance, Subcontractor Agreements, Jan-Dec tabs (behind each tab should be all activity from that month to include board meetings, minutes, financials, mailings, etc.).



WEEK 2		
ITEM	ACTION	COMPLETION
Computer Training		
<ul style="list-style-type: none"> ▪ TOPS ▪ TOPS Fact Sheet 		
<ul style="list-style-type: none"> ▪ File Management (iSynergy) 		
<ul style="list-style-type: none"> ▪ Attend board meeting(s) 	Check with a fellow manager and attend a board meeting. More than one meeting is recommended.	
<ul style="list-style-type: none"> ▪ Board Training 	Read HOAMCO Board Training Materials and handouts located on HOAMCO Employee Website	
Property-Specific Management		
<ul style="list-style-type: none"> ▪ Property visits 	Schedule with a board member or another manager	
<ul style="list-style-type: none"> ▪ CC&Rs 	Highlight main sections for each property you are managing	
<ul style="list-style-type: none"> ▪ Compliance schedule 	Create a compliance schedule for your properties	
<ul style="list-style-type: none"> ▪ Subcontractor list 	Contact all subcontractors and introduce yourself as a point of contact	
<ul style="list-style-type: none"> ▪ Board meeting 	Find out when next board meeting is scheduled. Call board president to review agenda items. See Stacy for help with back-up materials, etc.	
<ul style="list-style-type: none"> ▪ Collection Policy 	Read and understand policy.	
<ul style="list-style-type: none"> ▪ Compliance Coordinator 	Meet with Compliance Coordinator to talk about how compliance is being handled in your communities.	
Community Association Management		
<ul style="list-style-type: none"> ▪ M-100 Book 	Read Chapters 3 – 4	
<ul style="list-style-type: none"> ▪ GAP Reports 	Read GAP Report # 22 and #23 (Roles of Treasurer and President)	



WEEK 3		
Item	Action	Completion
Accounting Training – purpose – understand who to go to for what and know what approval requirements/deadlines are expected.		
▪ A/R & Collections	Schedule sit down with A/R & Collections	
▪ Escrow	Schedule sit down with Escrow	
▪ A/P	Schedule sit down with A/P	
▪ Financials	Schedule sit down to review financials	
▪ Portfolio Accountant	Identify who the accountant is for each of your communities	
Community Association Management		
▪ Legal (check out from Stacy)	See Stacy for needed documents.	
▪ GAP Report	Read Gap #4 (Insurance) and GAP #24 (Reserve Study)	
Property-Specific Management		
▪ Minutes	Read last 6 months of each board meeting minutes. Compare with most current management report to verify if action items have been completed.	
▪ Management Reports	Find and read previous months' management reports and begin developing a management report	
▪ Create a management report	Refer to HOAMCO Template. Ask Stacy if you need a template.	
▪ Subcontractors	Schedule a walk-through with monthly maintenance vendors, especially landscaping, and get acquainted with what areas of responsibility are for the association. Understand the scope of work to be done for each vendor.	
Administrative		
▪ ARC department	Schedule sit down with ARC to understand the scope of services provided by this department.	



WEEK 4		
Item	Action	Completion
Property-Specific Management		
▪ Reserve Study	Read reserve study and develop list of questions	
▪ Existing Budget	Set up meetings with respective HOAMCO accounting contact for questions	
▪ Insurance	Call insurance agent for any questions	
Community Association Management		
▪ M-100 Book	Read Chapters 5 - 6	
▪ GAP Reports	Read GAP report # 9 (Bid Spec) and #10 (Collecting Assessments)	
▪ Legal (check out from Stacy)	Read Ekmark Green Legal book - Chapters 21 - 34	
▪ HOAMCO Annual Meeting Packet	Review packet and file for reference (located on shared drives)	
Property-Specific Management		
▪ Continue Property visits	Schedule with a board member or another manager	
▪ Continue CC&Rs	Highlight main sections for each property you are managing	

WEEK 5		
Item	Action	Completion
Community Association Management		
▪ M-100	Chapters 7 and 8	
▪ Gap Reports	Read # 12 (Landscape Maintenance) and #21 (Annual and Spec Meetings)	
▪ Best Practices	Found in iSynergy or shared drive	

CONGRATULATIONS!