

EAST HORIZON CONDOMINIUM ASSOCIATION
Administrative Procedure

P&P Title:	Administrative Procedure			
P&P Number:		Revised:		Effective Date: 12/16/2021

Approved By: EHCA Board

Date Approved: 12/16/2021

OVERVIEW

Description:

East Horizon Condominium Association (EHCA) wishes to ensure routine operations occur smoothly and in compliance with Florida law.

Reference

Florida 718

Purpose

To clarify expectations for how routine matters are to be handled including responsibilities of the Contract Management Company (CMC) and Board Members.

Applicability

Contract Management Company
Board Members

Procedure

The attached outline highlights expectations for how routine operations will be handles along with responsibilities for the contract management and board members in meeting these requirements.

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Administrative Procedure

Category	Contract Management Company	EHCA Board
Administrative	<ul style="list-style-type: none">▪ Guide and advise the Board and Association on known policy issues pertaining to the association documents and government statutes▪ Assist the board in enforcing association documents, rules and regulations sending letters or taking steps as directed by the board.▪ Assist in the preparation and filing of amendments and liens.▪ Act as a liaison with the community and other professional contacts.▪ Collect and appropriately process mail for the association.▪ Assist with the administrative aspects of insurance claims and issues.	<ul style="list-style-type: none">▪ The Board President oversees the CMC in the performance of administrative matters.▪ The Board President is responsible for the annual insurance program, audits, claims and legal matters.
Statutory Requirements	<ul style="list-style-type: none">▪ Manage all statutory requirements related to meeting notices, minutes, board elections, budget and other matters (e.g. Special Assessment, Material Change) which may arise from time to time.▪ Support monthly board meetings:<ul style="list-style-type: none">○ Prepare meeting package containing agenda, minutes from the previous meeting and financials and release to the board no later than 2 days in advance of regularly scheduled meetings.○ Capture minutes and follow-up as needed to verify accuracy.○ Prepare any follow-up owner communications that may be required.	<ul style="list-style-type: none">▪ The Board Secretary oversees the CMC in the performance of statutory requirements oversees the website, owner communications and hurricane plan.

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	<ul style="list-style-type: none"> ▪ Maintain association records in accordance with Legal requirements. ▪ Maintain a current and accurate listing of Unit Owners including mailing address, telephone and email contact information. Ideally, secure owner authorization to manage official communications via email. ▪ Ensure the hurricane plan is current and in compliance with statutory requirements. ▪ Ensure owners are kept informed through association website and regular owner communications. 	
Financial	<ul style="list-style-type: none"> ▪ Assist in the development of the proposed annual Operating and Reserves budgets for approval and adoption by the board. ▪ Prepare specified monthly financial statements and reports for timely delivery to the board with complete and accurate reconciled accounting for all funds and accounts. ▪ Collect and deposit checks, fees and assessments. ▪ Perform monthly reserves transfer. ▪ Manage assets of the association maintaining records of all accounts. ▪ Maintain the associations financial records and accounts with recognized and acceptable standards. ▪ Prepare year-end financial statements for accountant and taxes. 	<ul style="list-style-type: none"> ▪ The Treasurer oversees the CMC in the performance of financial duties and prepares the annual operating and reserves budget for board approval. This must include and assessment of future funding needs and recommendations to meet those requirements. ▪ Invoices must be reviewed and approved by the board member monitoring receipt of goods and/or performance of service. ▪ All checks must be signed by 2 board members with signature authority on the account from which funds are being drawn.

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	<ul style="list-style-type: none"> ▪ Develop timely written communication to delinquent owners when debts are not satisfied by the payment deadline in accordance with the financial policy. <ul style="list-style-type: none"> ○ In the event an owner requests to be placed on a payment plan, escalate the request to the Board for consideration. ○ Accounts that are 60 days past-due and not on a board approved payment plan must be immediately turned over to legal for collections with notice to the Board President and Treasurer. ▪ Monitor and validate invoices sent to the association. ▪ Pay bills and provide all check writing for the association. ▪ Forward checks for signature on a bi-weekly basis or more urgently as needed. ▪ Unlimited phone/email correspondence with the associations board and owners regarding financial matters. 	
<p>Maintenance</p> <p>Maintenance</p>	<ul style="list-style-type: none"> ▪ Primary point of contact for owners with respect to emergencies, routine maintenance and coordination of special needs (e.g., elevator pads, roof access, dumpster placement, crane/lift on property, remote/key pad programming). ▪ Receive and log requests from owners and capture: <ul style="list-style-type: none"> ○ Name ○ Unit Number ○ Specifics of the need or issue/need ▪ Communicate requests to maintenance directors. 	<ul style="list-style-type: none"> ▪ The Maintenance Director oversees the CMC, maintenance employee and contracted vendors (directly or via designee) to manage routine maintenance and: <ul style="list-style-type: none"> ○ Priorities and resolve requests ○ Notify CMC of any outcomes ○ Communicate with owners as needed ○ Secures board approval (for non-emergency repair over \$2,000.

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	<ul style="list-style-type: none"> ▪ Respond to owner confirming the request was received and, when available, expectations on how/when the request will be addressed. ▪ Maintain a current log of requests and status to enable feedback on what has been accomplished or delayed. ▪ Promptly investigate any accidents or claims for damage and make timely report(s) and/or filing to the insurance company as required by law. 	<ul style="list-style-type: none"> ▪ Purchase supplies as necessary to keep the community running normally. ▪ Determine what needs/problems cannot be resolved in-house and require outside assistance. ▪ Assist committees in obtaining competitive bids, coordinate prospective vendor site visits and assist the board in the selection of vendors for projects outside the CMC scope of work. ▪ When unit access is required a board member will notify the owner. ▪ In case of emergency, and owner can't be reached, 2 board members will sign out the key from the complex safe to enable access. ▪ The Maintenance director recommends areas that require owner education to ensure smooth operations. ▪ When a unit owner requires programming of garage remote or front entrance keypad the Maintenance Director collects any funds dictated by policy and directs the Maintenance Employee to address the request. ▪ Board Secretary to oversee key replacements including the verification of missing key codes and collection of funds to replace missing keys.
Change in Unit Ownership	<ul style="list-style-type: none"> ▪ Respond to current owner request for information to assist in real estate transaction ▪ Prepare the estoppel after assessing status of the unit account: 	<ul style="list-style-type: none"> ▪ Support CMC as required to handle data request/response ▪ New owner orientation

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	<ul style="list-style-type: none">○ Identify balance due to Association at closing working through legal as necessary for delinquent accounts○ Identify the 4 common area keys assigned to the unit to be sure they are transferred at closing and/or payment is received for replacement keys○ Supply documentation for new-owner to sign up for email communication.○ Provide new owner with copies of the EHCA Association Docs, Rules & Regulations○ Provide the new owner with an EHCA welcome package including CMC contact information and association website▪ After closing confirm:<ul style="list-style-type: none">○ Confirm all funds due to the association have been collected and that there is clarity on when the next monthly HOA assessment is due.○ Collect a signed copy of the common area key transfer and cc: the association secretary○ Receipt of the New Owner Registration Form, ideally the authorization for electronic communication and that all required information has been completed.○ Ensure the authorized signature list has been provided which is particularly important in the event the unit is owned by a corporation or trust.○ Receipt of pet registration form if appropriate.	

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	<ul style="list-style-type: none"> ○ Provide new owner with copies of the EHCA Association Docs, Rules & Regulations ○ Add the new owner to the contact list with verified contact information (name, unit #, phone, email, e-document authorization status). ▪ Notify board members that there is a new owner and provide a copy of the owner registration form 	
Lease	<ul style="list-style-type: none"> ▪ Receive and review forms (LEASING UPDATE FORM and TENANT ACKNOWLEDGEMENT FORM), confirm all information required has been completed (including a copy of the lease) and that the unit is eligible for lease under EHCA policy. ▪ If the unit is not eligible to be leased, reject the lease and notify both the unit owner and board. ▪ Contact the unit owner to remedy any missing information and/or association required documents (Lease naming all occupants, LEASING UPDATE FORM and TENANT ACKNOWLEDGEMENT FORM). ▪ Notify board members that there is a new tenant and provide board members with a copy of the LEASING UPDATE FORM. ▪ Collect pet registration form from the tenant if appropriate ▪ <i>Note: Unit owner is responsible to ensure relevant notices and communications are sent to the tenant.</i> 	<ul style="list-style-type: none"> ▪ Support CMC as required to handle any issues ▪ Orient tenant as necessary
Unaccompanied Houseguests	<ul style="list-style-type: none"> ▪ Receive and review Unaccompanied Houseguest Request form to ensure all information is provided especially guest names, contact information and 	<ul style="list-style-type: none"> ▪ Receive Unaccompanied Houseguest Arrival Form and confirm it is consistent with the request.

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	<p>which common area key number(s) have been temporarily assigned by the unit owner to the guest(s).</p> <ul style="list-style-type: none"> ▪ Notify board members that guests are expected and forwards a copy of the Leasing Update Form to board members. 	<ul style="list-style-type: none"> ▪ Be mindful of Unaccompanied Guests and guide them, if necessary, to comply with Association Rules & Regulations.
Pets	<ul style="list-style-type: none"> ▪ Receive and review all PET/ASSISTANCE ANIMAL REGISTRATION FORM and ensure all information required is provided and maintained in the unit file. ▪ Notify the board of any new animals that will be living on the property. ▪ Forward ASSISTANCE ANIMAL ACCOMODATION REQUEST to the board for review and approval. ▪ Ensure the request is added to the agenda of the next board meeting for review and provide feedback as appropriate based on the Board Decision. 	
Unit Modification	<ul style="list-style-type: none"> ▪ Receive EHCA UNIT MODIFICATION REQUEST and UNIT MODIFICATION PACKAGE and forward to the ARC Committee Chair for review. ▪ Communicate board decision and guidance to unit owner ▪ Maintain records within the unit file: <ul style="list-style-type: none"> ○ Unit Modification Request ○ Unit Modification Package ○ Board Communications to owner ○ Copy of Brevard County Permit(s) as required ○ Copy of Brevard County Inspection/release as required 	<ul style="list-style-type: none"> ▪ The Architectural Review Committee (ARC) will review requests for compliance with EHCA guidelines and recommend response for BOD review and approval. ▪ BOD may deny approval, with reason(s). Owner can correct the reason(s) for denial and re-submit for approval. ▪ ARC will draft response to owner consistent with board decision and guidance.

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	<ul style="list-style-type: none">▪ Maintain a master file to identify which units have owner-replaced windows.	
Common Room Exclusive Use	<ul style="list-style-type: none">▪ CMC to receive and manage requests for Common Room Exclusive Use:<ul style="list-style-type: none">○ Notify Board○ Secure board approval○ Communicate approval and collect two separate checks: 1) cleaning deposit and 2) room usage fee○ Return cleaning deposit after maintenance director verifies the room was left in satisfactory condition	<ul style="list-style-type: none">▪ Board Secretary to maintain the room schedule:<ul style="list-style-type: none">○ Verify room is available○ Post notice of exclusive use booking on room door○ Notify activity coordinator in the event of a conflict with regularly scheduled “non-exclusive use” activities▪ Maintenance Director to authorize release of deposit after verifying room condition.