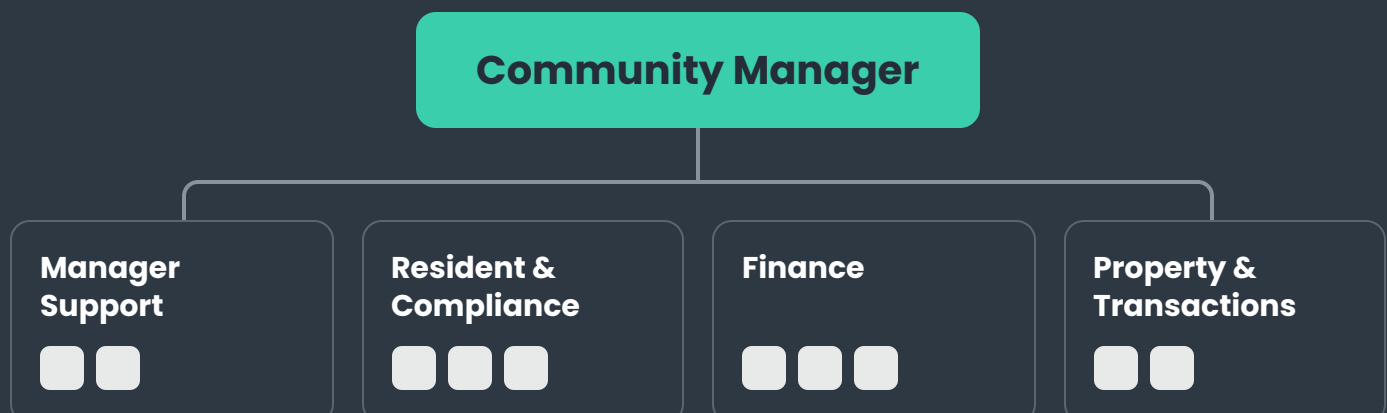


## COMMUNITY ASSOCIATION

# Job Descriptions & KPIs

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Ten support roles for your community managers: what each one owns, what it never touches, and the scorecard to measure it.



## WHY THIS EXISTS

Most management companies have already worked out that the community manager cannot do everything. They have written the coordinator roles, posted them and filled them locally, and the queues still back up, because hiring is slower than growth. This is the part nobody publishes: the ten roles, what each one owns, what each one must never touch, and how they sit around the manager on an org chart. Use it whether or not you ever talk to us.

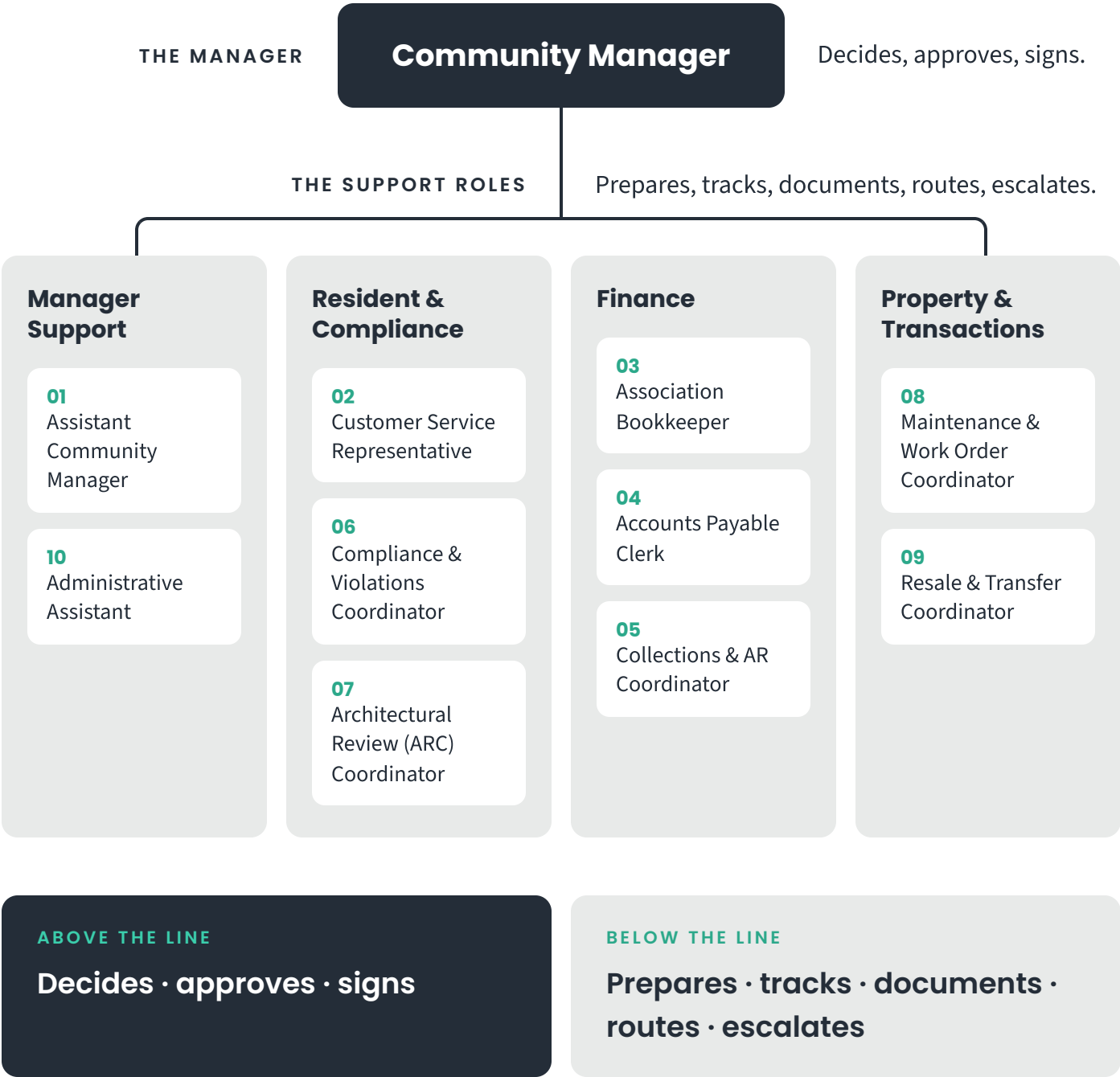
## THE PRINCIPLE

### **It comes down to who decides.**

A support role prepares, tracks, documents, routes and escalates. Judgment, approval, fund release and the board relationship stay with the community manager. Every role below has an owns list and a does-not-own list. The second list is the more important one: it lets you answer a board president in a single sentence, and it is what your managers should read first.

THE ORG CHART

# The four pods



Ten roles. Nothing crosses the line except exceptions, approvals and judgment calls.

## BEFORE YOU HIRE

# Check this first

## BEFORE ANY ROLE GOES REMOTE

Remote work isn't automatically permitted for every role in community association management. Before you place anyone, confirm these client by client:

- State licensing requirements for the work involved
- What each management agreement allows
- Any restrictions the board has set
- Insurance coverage
- Who holds final authority for each decision the role touches

**If any of these is unclear for an association, that association's work stays put until it's resolved.**

## THE FIRST 90 DAYS

Every role follows the same 30/60/90 ramp; see The First 90 Days. Each role below adds only its own ramp notes.

## NOTE ON TITLES

These are the industry's own titles. If you use different names internally, such as Client Experience Associate, Community Standards Coordinator, Covenants Administrator or Client Accounting Specialist, keep yours. What should not vary is what each role owns and what it never touches.

# 01 Assistant Community Manager

**OUTCOME** The board packet is built before the manager opens it, and nothing agreed in a meeting gets lost afterwards.

*Here, a preparation role. If your ACMs attend meetings and advise boards, that is a different job.*

## ✓ OWNS

- Board packet assembly (agenda, prior minutes, financial exhibits and the manager's report), compiled to a standing schedule
- Meeting logistics: notice distribution, calendar, materials, attendance tracking
- Minutes drafting from recordings or notes, routed for manager review
- The action log from every meeting, and the chasing that follows it
- Resident correspondence on forms, reservations, amenity access and general questions
- The community document archive: governing documents, resolutions, meeting records, votes and proxies, filed and current
- New board member onboarding packets after each annual meeting
- Escalation tracking: what was raised, when, to whom, and whether it closed

## ⊘ DOES NOT OWN

- Sending sensitive, enforcement, legal or policy communication
- Interpreting governing documents for a homeowner or a board
- Any commitment on behalf of the association
- Representing the management company at a board meeting
- Final content of the manager's report or the minutes
- Decisions about what goes on an agenda

| SCORECARD MEASURE                  | YOUR TARGET |
|------------------------------------|-------------|
| Packet delivered on schedule       | _____       |
| Action items closed by due date    | _____       |
| Manager rework rate on drafts      | _____       |
| Minutes turnaround                 | _____       |
| Items aged past their promise date | _____       |

## LIVES IN

Vantaca, CINC, Enumerate (TOPS), Caliber · the community portal · the document archive · shared calendar

## WHO IS GOOD AT THIS

Someone who has run a shared inbox or a service queue against a published response standard. Written English a board member reads without noticing it. Documentation instinct matters more than industry vocabulary; the vocabulary takes weeks.

## RAMP NOTES

Shadowing and terminology in month one. Owning packet prep for a handful of communities under review by month two. Full portfolio coverage in month three.

# 02 Customer Service Representative

**OUTCOME** A homeowner gets an answer the same day, from someone whose actual job it is.

## ✓ OWNS

- Inbound calls and the community inbox, answered inside a stated window
- First-pass triage: resolve, route or escalate against a written decision tree
- Account balance and payment-method questions, from the record
- Portal registration help and password resets
- Logging every contact so the next person has the history
- After-hours voicemail and ticket capture for next-morning routing
- Reporting the top five recurring questions each month

## ⊘ DOES NOT OWN

- Any judgment call on an enforcement or financial dispute
- Committing the association or the management company to anything
- Negotiating a payment arrangement
- Communication with a board member acting in their board capacity
- Anything a homeowner is likely to forward to an attorney

### SCORECARD MEASURE

### YOUR TARGET

|                                   |       |
|-----------------------------------|-------|
| Answer rate and speed             | _____ |
| First-contact resolution          | _____ |
| Escalation accuracy               | _____ |
| Repeat contacts on the same issue | _____ |
| Contact log completeness          | _____ |

### LIVES IN

The phone system, the management platform, the portal, the ticket queue

### WHO IS GOOD AT THIS

High-volume service experience with a real quality standard behind it. Hospitality and call-center backgrounds transfer well; this is the one role where that is the right instinct.

### RAMP NOTES

Live on calls with a script and an escalation tree within the first few weeks, the quickest of the ten to reach the phone. Handling the queue under review through month two.

# 03 Association Bookkeeper

**OUTCOME** Month-end stops being an event.

## ✓ OWNS

- Transaction coding to the approved chart of accounts, per association
- Bank and credit card reconciliation preparation, with an exception log
- Financial package assembly for board review on a published calendar
- Budget-versus-actual variance flagging for the manager's attention
- Reserve contribution and transfer records
- Vendor W-9 and payment-detail collection and verification
- 1099 preparation support and year-end audit document assembly

## ⊘ DOES NOT OWN

- Approving anything, or releasing any funds
- Bank access beyond read-only, and never a signature
- Closing a period or approving a ledger
- Budget decisions or reserve funding recommendations
- Anything requiring a licensed accounting opinion

### SCORECARD MEASURE

### YOUR TARGET

Coding accuracy, measured by post-review corrections

Exception aging

Packages delivered on schedule

Reconciliation prep turnaround

Audit items ready first time

### LIVES IN

The management platform's general ledger, banking portals in read-only, spreadsheets, the document archive

### WHO IS GOOD AT THIS

Bookkeeping in a multi-entity environment. The multi-entity part is what transfers: every association is a separate set of books with its own board and its own budget.

### RAMP NOTES

Month one on coding under review. Month two on reconciliation prep. Owning a package calendar in month three.

# 04 Accounts Payable Clerk

**OUTCOME** No invoice sits in a manager's inbox waiting to be looked at.

✓ **OWNS**

- Invoice intake from every channel, into one queue
- Matching invoices to work orders, contracts and approved scopes
- Coding and routing for approval, chasing the approvers who are late
- Duplicate and overbilling detection
- Vendor statement reconciliation and dispute documentation
- Recurring-contract payment calendars and renewal date tracking
- The paid-invoice archive, filed against the right association and period

⊘ **DOES NOT OWN**

- Approving an invoice at any dollar amount
- Initiating or releasing a payment
- Deciding a vendor dispute
- Authorizing work outside an approved scope, or a change order

| SCORECARD MEASURE                           | YOUR TARGET     |
|---------------------------------------------|-----------------|
| Invoices in queue after receipt             | Within 24 hours |
| Approval cycle time                         |                 |
| Duplicates and errors caught before payment |                 |
| Late-fee incidents                          |                 |
| Archive completeness                        |                 |

**LIVES IN**  
The AP module of the management platform, vendor portals, the work order system, the document archive

**WHO IS GOOD AT THIS**  
Straight AP experience, ideally somewhere with a real approval chain and a refusal to work around it. In this role, following the process exactly is the skill.

**RAMP NOTES**  
Productive under supervision in weeks three to four, and the easiest role to measure.

# 05 Collections & AR Coordinator

**OUTCOME** Delinquency is tracked continuously instead of discovered at budget time.

✓ **OWNS**

- Assessment posting and payment application
- Aging reports on a fixed cadence, by association
- The delinquency timeline against the board's approved collections policy
- Payment plan tracking and compliance monitoring
- Documentation packages for accounts being referred out
- Lockbox and payment-processor exception handling
- Reporting which associations are drifting and why

✗ **DOES NOT OWN**

- Waiving a fee, an interest charge or a late penalty
- Deciding when to lien, refer to counsel or write off
- Negotiating or agreeing to a payment plan
- Any communication a delinquent homeowner could read as a demand
- Bank authority of any kind

| SCORECARD MEASURE                                        | YOUR TARGET |
|----------------------------------------------------------|-------------|
| Aging accuracy                                           | <div></div> |
| Reports delivered on cadence                             | <div></div> |
| Payment plan compliance rate                             | <div></div> |
| Referral packages complete first time                    | <div></div> |
| Days between a milestone being hit and it being surfaced | <div></div> |

**LIVES IN**  
The AR module, lockbox and processor portals, the collections policy, the document archive

**WHO IS GOOD AT THIS**  
AR or credit-control experience. Comfortable with numbers that represent an uncomfortable situation, and disciplined about staying on the reporting side.

**RAMP NOTES**  
Month one on posting and reporting. Month two owning the aging cadence under review. Referral documentation in month three.

# 06 Compliance & Violations Coordinator

**OUTCOME** Enforcement becomes consistent and documented, which is also the best answer you have when it is challenged.

## ✓ OWNS

- Violation intake from inspections, reports and homeowner complaints
- Photo and evidence logging against the right lot and the right rule
- The notice sequence, issued on the schedule the board approved
- Cure period and re-inspection calendars
- Hearing scheduling, notice and packet preparation
- Fine ledger tracking against the approved schedule
- Consistency reporting: flagging where enforcement has diverged within a community

## ✗ DOES NOT OWN

- Deciding whether something is a violation
- Waiving a fine or extending a cure period
- Any discussion with a homeowner about an enforcement decision
- Legal referral or communication with counsel
- Interpreting an ambiguous covenant

### SCORECARD MEASURE

### YOUR TARGET

Notices issued within the approved window

Evidence completeness at the point of challenge

Cure dates missed

Zero

Divergence flags raised before a complaint arrives

### LIVES IN

The compliance module, inspection app output, the photo archive, the governing documents, the hearing calendar

### WHO IS GOOD AT THIS

Process discipline over judgment. Someone who follows a documented sequence exactly and raises a hand at the edge case instead of resolving it. Claims, permitting, credentialing and QA backgrounds transfer unusually well.

### RAMP NOTES

Month one learning the governing documents and the notice schedules. Month two running the sequence under review. Owning the calendar in month three.

# 07 Architectural Review (ARC) Coordinator

**OUTCOME** Applications stop stalling on incompleteness, and committees get a packet they can decide from.

## ✓ OWNS

- Application intake, acknowledgment and the review clock
- Completeness checks against the community's submission requirements
- Chasing missing plans, specifications, surveys and neighbor sign-offs
- Committee packet assembly with prior precedent for similar requests
- Committee meeting scheduling and vote recording
- Decision letters issued from the committee's recorded decision
- The approvals archive, searchable by lot and by request type
- Post-approval completion tracking and closeout

## ✗ DOES NOT OWN

- Approving, denying or conditioning any request
- Interpreting design guidelines for an applicant
- Advising a homeowner on what would be approved
- Granting a variance or an extension

### SCORECARD MEASURE

### YOUR TARGET

Acknowledgment inside the stated window

Applications complete at first committee review

Review-clock misses

Zero

Precedent correctly surfaced

Closeout rate

### LIVES IN

The ARC module or forms queue, the design guidelines, the approvals archive, the committee calendar

### WHO IS GOOD AT THIS

Permitting, planning support, insurance underwriting support: anywhere the job is checking a submission against a checklist and chasing what is missing without deciding the outcome.

### RAMP NOTES

Month one on intake and completeness. Month two on packet assembly under review. Precedent research and closeout in month three.

# 08 Maintenance & Work Order Coordinator

**OUTCOME** The chase stops being the manager's job, and a homeowner can be told where their request stands.

## ✓ OWNS

- Work order intake, categorization and routing to the approved vendor
- Status chasing and the update loop back to the homeowner or manager
- Certificate of insurance collection, expiry tracking and renewal chasing
- Bid solicitation against a written scope, and side-by-side comparison assembly
- Recurring maintenance and warranty calendars
- Job costing records against the right association and budget line
- After-hours ticket logging and next-morning triage
- Vendor performance notes: response times, callbacks, no-shows

## ✗ DOES NOT OWN

- Selecting a vendor or awarding work
- Approving spend, a change order, or anything above the board's threshold
- Writing the scope of work
- Declaring an emergency or committing association funds to one
- Accepting completed work as satisfactory

### SCORECARD MEASURE

### YOUR TARGET

|                                               |       |
|-----------------------------------------------|-------|
| Time to first vendor contact                  | _____ |
| Orders open past expected completion          | _____ |
| COI lapses                                    | Zero  |
| Bid packages complete on request              | _____ |
| Homeowner status inquiries, which should fall | _____ |

### LIVES IN

The work order module, vendor portals, the COI tracker, the phone

### WHO IS GOOD AT THIS

Dispatch, field service or facilities coordination. Someone comfortable making the fourth call to a vendor and still pleasant about it. The most phone-forward of the ten.

### RAMP NOTES

Month one on intake and routing. Month two owning the chase under review. Bids and COI compliance in month three.

# 09 Resale & Transfer Coordinator

**OUTCOME** Resale requests turn around on a clock instead of when someone has time.

## ✓ OWNS

- Resale and transfer request intake and the turnaround clock on each one
- Package assembly: governing documents, financials, insurance, rules
- Assembling the account and compliance records a certificate is built from
- Title, lender and closing-agent correspondence on status and missing items
- Document version control on the official set
- New owner intake: welcome pack, portal registration, account setup, autopay enrollment
- Records retention, filing discipline and the audit trail
- Resale and transfer fee billing per the published schedule

## ✗ DOES NOT OWN

- Certifying a balance or signing anything a closing relies on
- Interpreting a governing document for a buyer, lender or attorney
- Confirming compliance status as a matter of record
- Approving a transfer or waiving a transfer fee

### SCORECARD MEASURE

### YOUR TARGET

Turnaround against the stated window

Packages needing correction after review

Document version accuracy

New owner setup complete before first assessment

Fees billed and collected per the published schedule

### LIVES IN

The resale portal, the management platform, the document archive, email with title and lender contacts

### WHO IS GOOD AT THIS

Title, escrow or closing coordination: anywhere the job runs on a deadline someone else set. Deadline instinct is the whole role.

### RAMP NOTES

Month one on intake and assembly under review. Month two on the correspondence loop. Owning the clock in month three.

# 10 Administrative Assistant

**OUTCOME** The small things that quietly consume a whole afternoon stop landing on people who cost more.

## ✓ OWNS

- Mailings: notices, statements, newsletters, annual disclosures
- Data hygiene: owner records, contact details, mailing addresses, rental registries
- Document scanning, naming and filing to the archive standard
- Calendar and meeting logistics across the portfolio
- Form and template maintenance
- Newsletter and community announcement assembly from supplied content
- Expense reports, supply orders and internal reporting support
- Onboarding checklists when a new community comes on

## ✗ DOES NOT OWN

- Any client-facing communication without review
- Deciding what gets communicated, or when
- Access to funds, banking or payment systems
- Anything with a statutory deadline attached to it

### SCORECARD MEASURE

### YOUR TARGET

Mailings out on schedule

\_\_\_\_\_

Returned mail rate

\_\_\_\_\_

Record accuracy on audit

\_\_\_\_\_

Filing compliance

\_\_\_\_\_

New community onboarding checklist completion

\_\_\_\_\_

### LIVES IN

The management platform, mail merge and print vendors, the document archive, shared calendars

### WHO IS GOOD AT THIS

General admin with real attention to detail and no drama about repetitive work. The easiest of the ten to hire and the easiest to underuse: give it a real scorecard or it drifts.

### RAMP NOTES

Productive under supervision in weeks two to three.

THE NEXT STEP

# Find the role your managers need filled first.

Bring your org chart to a 30-minute consultation. We'll look at where your managers' hours go, pick the one role that gives them back the most, and leave you with its owns list, its does-not-own list and the scorecard to hold it to.



**Book your 30-minute consultation →**

[betterwho.com/services/staffing/community-associations](https://betterwho.com/services/staffing/community-associations)

**BETTER  
WHO**

Work on your business, not in it.

[betterwho.com](https://betterwho.com)