



Newly elected members to the board of directors take on fiduciary responsibilities from previous board members. Those responsibilities include:

- 1 Establishing policies, plans, objectives and goals for the association;
- 2 Selecting and obtaining the most cost-effective and capable management company;

facto leader of the association, and it is his duty to preside at all meetings of the board of directors as well as before the membership in general. With input from other board members, the president sets meeting agendas and controls all meetings.

The president also must assume additional duties unless these duties are assigned and accepted by another officer. For example, the president must

NEWLY ELECTED OFFICERS: DO YOU KNOW WHAT YOU DO?

By Mark Montgomery

- 3 Authorizing and establishing budgets to support the policies, plans, objectives and goals for the association;
- 4 Assigning association assessments;
- 5 Specifying performance requirements and setting standards for the association's staff, contractors and management company. Fiduciary responsibility requires the board members to have a sound, valid objective (which is factually supportable or derived from professional advice) upon which sound decisions can be based.

Election of officers

Community associations' legal documents are required to provide for officers of the association. Typical officers are president, vice president, secretary and treasurer. In order to spread out the board

represent the board before the homeowners, and unless other board members accept representation responsibilities, the president must represent the board before established committees. In addition, the president creates ad hoc committees with an approval of the board members and, unless another board member accepts the liaison responsibility, acts as liaison to these committees. More specifically, the president is responsible for executing legal documents on behalf of the association unless this duty is assigned and accepted by the treasurer. The president also has liaison responsibility to the representative of the management company, if any, when the vice president is not assigned and/or does not accept this responsibility.

The *vice president* performs all of the president's duties in his absence, or is assigned by the president and typically shares some of the president's

The legal requirements provided by the association's governing documents gives the board the authority and the power to set and implement policies and establish standards.

members' workload, other officers may be elected by the board for additional duties, if the board has five or more members. Officers are elected from and by the board of directors, and are subject to removal by the board, although this is uncommon. Each officer serves at the pleasure of the board in carrying out specific duties and responsibilities delineated in the association's bylaws.

Officers' duties and responsibilities

The *president* is the chief executive officer and de

burdens regarding appearances, liaison services, public hearings, etc. The vice president can be considered vice president of a property or chief of the physical plant and has liaison responsibility to the management company, if this duty is not performed by the president, in addition to liaison responsibility to association personnel, contractors and committees as approved by the board.

The *secretary* is the chief administrative officer responsible for the association's archives, historical

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- » Chapter Executive Director of the Year: **Claudette Carini**, New England
- » Distinguished Service Award: **Michael E. Packard**, PCAM, CPM, Associa Inc., Carlsbad, Calif.
- » Educator of the Year: **Ellen Hirsch de Haan**, ESQ., Becker & Poliakoff, P.A., Clearwater, Fla.
- » Outstanding Volunteer Service Award: **Edwin J. Vitrano**, PCAM, Trilogy at Rio Vista Master Association, Rio Vista, Calif.
- » Recruiter of the Year: **Forest L. Balderson**, One Hundred Central Condominium Association, Sarasota, Fla.

CAI's prestigious President's Award was given to **Jennifer M. Flynn**, CAI's director of governance. The CAI president selects the recipient of the annual award. Flynn was recognized by 2007 President Ronald L. Perl, Esq.

"I can't think of anyone more deserving of this award," says Perl. "This award is given to an individual who has displayed exemplary service and commitment to CAI and has been instrumental helping the president achieve the Institute's goals. There's one word to describe Jen's consistent dedication, hard work and unwavering commitment to the success of CAI over the years: invaluable." Flynn has been with CAI for 13 years.

CAI's President's Club was the recipient of the Foundation for Community Association Research President's Award, which is presented periodically for dedicated service and outstanding contributions to the Foundation. Foundation President Robert W. Browning, PCAM, RS, presented the award, to President's Club Chair Wilbert Washington II, Esq.

In addition to individual awards, 18 chapters earned achievement and excellence awards:

- » **Leadership:** West Florida
- » **Member Services:** Greater Los Angeles; San Diego; West Florida
- » **Public Affairs:** West Florida
- » **Best Net Growth:** Connecticut (12 percent); Orange County Regional (13 percent); West Florida (37 percent)

"Our chapters are the lifelines of CAI and play a vital role in the overall growth of our membership," says Crystal Danielson, CAE, vice president of membership and chapter relations. "We recognize and congratulate these chapters for their hard work and success."

CAI is a national membership association that provides information, tools and resources to homeowners and professionals who govern and manage community and condominium associations. CAI members include community managers, volunteer homeowner leaders and business and professionals who support common-interest communities. More information is available at www.caionline.org.

records, current operating plans and tracking of the board's long-term goals and objectives. He prepares and distributes board and membership meeting agendas established by the president, as well as prior board minutes and other materials referred to in the meeting agendas. The secretary maintains the minutes book of all meetings, the book of resolutions (for easy reference), as well as all official records and correspondence, contracts, the membership rosters, etc. He receives, verifies and maintains proxies and attests to the legitimacy of documents.

The *treasurer* is the chief financial officer responsible to the board for the association's financial affairs and all its pertinent financial records. He works with management staff, contractors and committees to develop and submit annual operating budgets for subsequent board approval. The treasurer maintains all records of the association's financial transactions in addition to maintaining the delinquency roster, tracking delinquent accounts and recommending actions regarding collections. Ever busy, the treasurer is responsible for receiving and disbursing funds as authorized by the board, preparing periodic financial reports, arranging - subject to board approval - an independent audit of the financial records and supporting transactions and serving as liaison to the finance committee, if in existence.

The *officer at large* can be considered vice president of customer relations or chief of the association's lifestyle. He takes charge of the association's social activities (the board would provide budgeted financial support) and serves as liaison to social and recreational committees, if in existence.

Role of the board

The legal requirements provided by the association's governing documents gives the board the authority and the power to set and implement policies and establish standards. The board may delegate its authority to implement its decisions to others, such as the management company, but it cannot delegate its responsibility to assume that its decisions are implemented and implemented correctly. If the board delegates its authority for administration and implementation, it must do so based on procedures and policies that assure qualified persons, contractors and companies are selected.

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