



# Understanding the Roles & Responsibilities of the Board and the Community Manager

Cardinal Management Group, A RealManage Company is committed to tailoring services to meet the individual needs of each community, with an understanding no two are alike.



# Presented by:

**Cynthia du Busc, Vice President, Business Operations, CMCA®, AMS®**



Cynthia has worked alongside the team at Cardinal Management Group since 2018. She has twenty-plus years in property management experience including residential leasing, contracting, and waterproofing. She has been a business and people manager for over 30 years and was a trainer in crisis management in the human services industry before joining the community association management field. Her love of problem-solving and customer service made HOA management the perfect fit for creating successful relationships with the Boards and owners served by Cardinal Management.

## AGENDA

1. Introductions
2. About Cardinal
3. Role of the Board
4. Role of Management Agent
5. Rights & Responsibilities
6. Working Together
7. Questions & Answers

# Presented by (cont'd):

**Crystal Williams, Director of Community Association Managers, Condo Division, CMCA®, AMS®**



Crystal Williams is a highly experienced and respected leader in the property management industry, bringing nearly twenty years of expertise to her work. She currently serves as the Director of the Condominium Division with Cardinal Management Group, where she oversees a dynamic portfolio and leads with a focus on operational excellence, team development, and client satisfaction.

Crystal's dedication to the field extends beyond her professional roles and into the broader community. As an Adjunct Faculty member at Prince George's Community College, she created and developed the *Introduction to Property Management Workforce Development Program*. This innovative program prepares students for entry-level roles in property management by offering real-world training, outlining professional expectations, and providing mentorship to ensure successful program completion.

Crystal is a credentialed professional, holding both the Certified Manager of Community Associations (CMCA®) and Association Management Specialist (AMS®) designations. Her commitment to elevating the industry and supporting the next generation of property management professionals is at the heart of everything she does.

- **Locally Established in 1987**
- **Multiple Office Locations**
- **Supported by National Brand**
- **Integrity, Transparency & Accountability**
- **Team Approach & Exclusive Manager Support System**
- **Professional Guidance & Leadership**



**CARDINAL MANAGEMENT GROUP**  
**A REALMANAGE COMPANY**

*The Winning Team –*  
**Managing** to Make a Difference.  
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- **Exists to preserve the nature of the community and protect the values of the homes within**
- **Membership is mandatory and automatic**
- **Residents are obligated by governing documents**
- **All members must pay lien-based assessments**

*What is an*

**HOA?**



## **The Fundamentals of a Community Association**

- Ensure the collective rights and interests of homeowners are protected and preserved
- Most local form of democracy with leaders elected by members to govern the best interests of residents
- Provide services and amenities, protect property values, and meet the established expectations of homeowners
- Succeed when they cultivate a true sense of community, active homeowner involvement, and a culture of building consensus
- The right to elect leaders and use the democratic process to influence policies that will protect investments
- Leaders protect the financial health by using effective management practices and sound business principles
- Leaders have a legal and ethical obligation to enforce governing documents and abide by applicable laws
- Leaders seek a balance between the preferences of individual residents and the collective rights of homeowners
- Leaders and residents should be reasonable, flexible, and open to the possibility – and benefits – of compromise, especially when faced with divergent views

## The Board

- Elected or Appointed
- Oversee the Association
- Not unlimited power – governing documents, POA/Condo Act, local/federal laws
- Authority under documents may be broad or specific, giving authority equal to a corporation or may define specifics

## General Authorities

- Set goals, standards, policies, & enforcement thereof
- Maintaining financial health, maintenance & adequate insurance
- Entering into contracts
- Creating and overseeing committees
- Conducting regular & annual meetings

“May” or “Shall” = Can & Required



Duty of Care

Duty of Loyalty

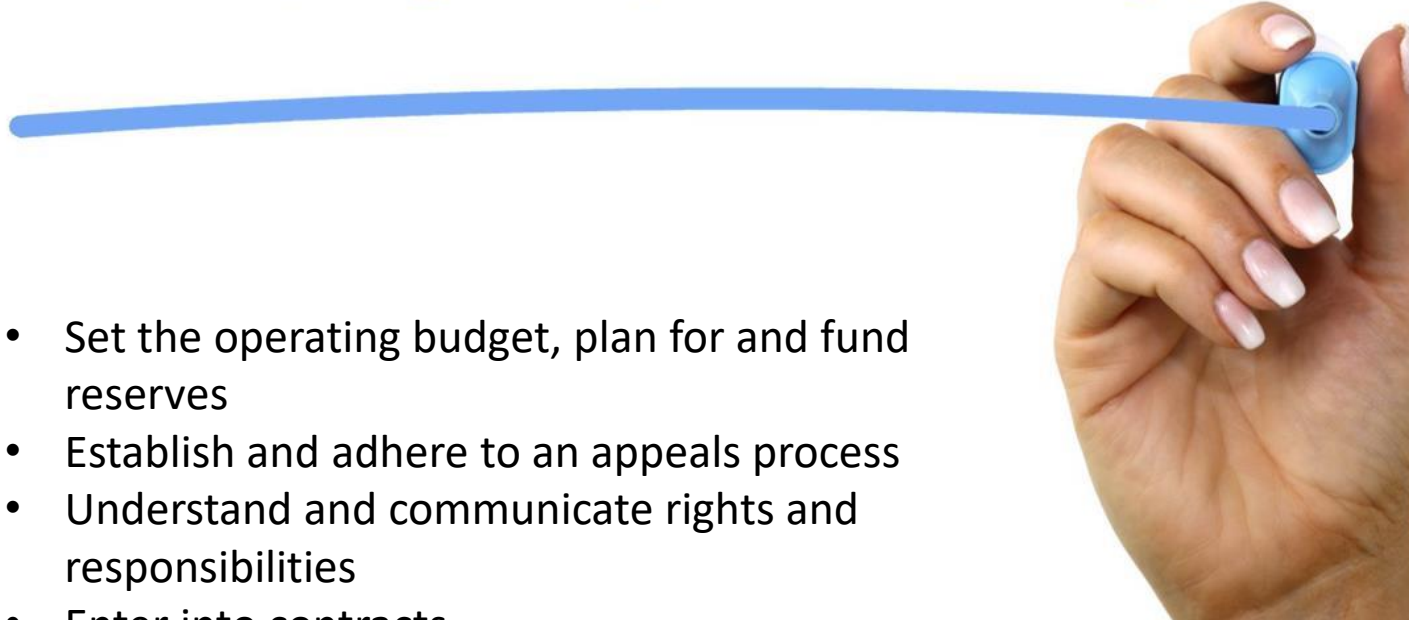
Duty to Act within Scope of Authority



## Responsibilities of the Role

- Fulfill fiduciary duties and maintain discretion in a manner reasonably believed to be in the best interest of the community
- Exercise sound business judgment and follow established management practices
- Understand the Association's governing documents, applicable laws & best practices and follow accordingly
- Conduct open meetings & solicit resident feedback through community forums, surveys, etc.
- Conduct business in a transparent manner
- Foster a sense of community
- Collect all monies due to the Association while providing arrangements for those needing payment plans
- Disclose any potential conflict of interest
- Set reasonable rules & regulations

# BOARD OF DIRECTORS

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- Set the operating budget, plan for and fund reserves
  - Establish and adhere to an appeals process
  - Understand and communicate rights and responsibilities
  - Enter into contracts



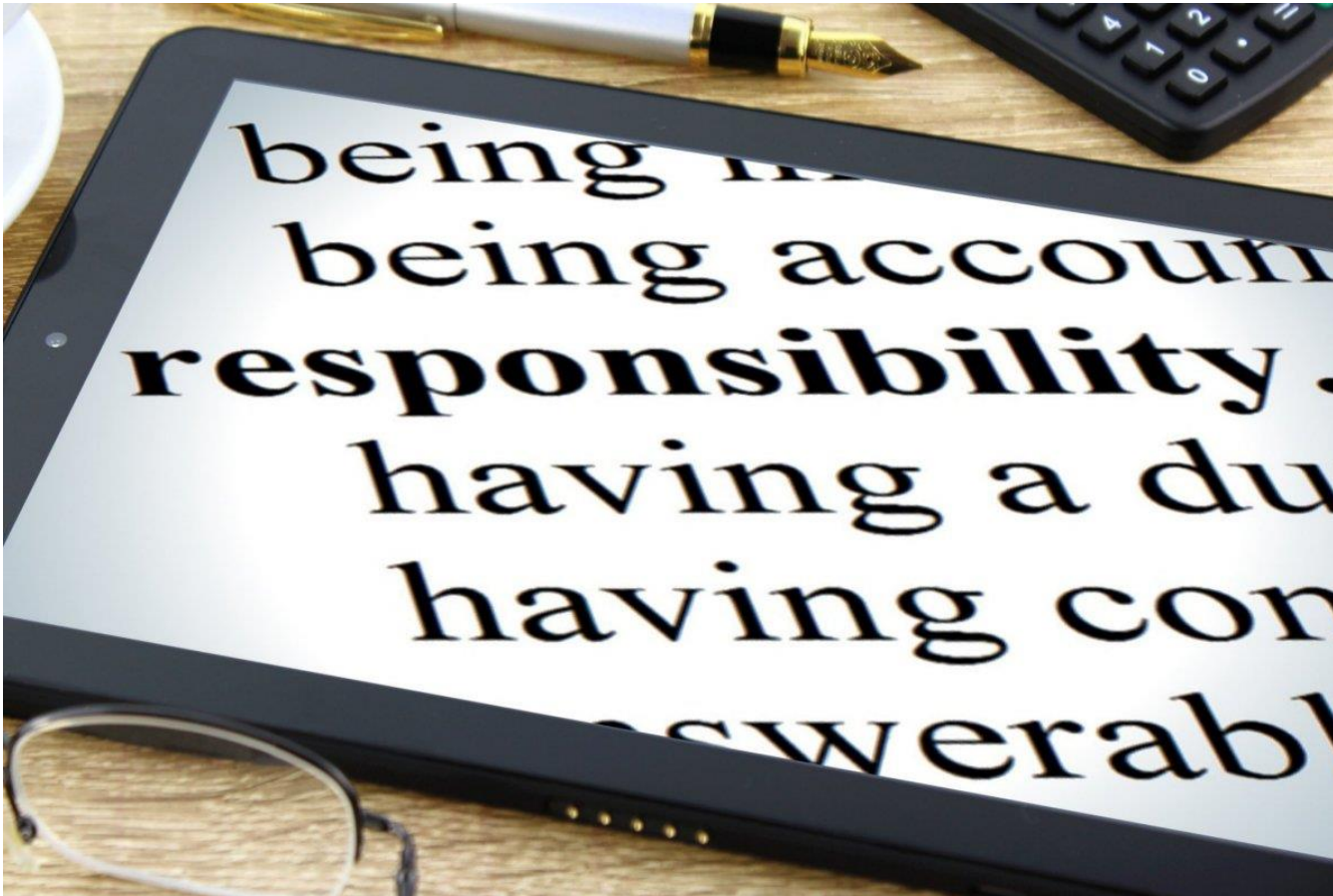


## The Role of Management

- Implement the decisions of the Board
- Administer services and programs as defined by the governing documents
- Assist in the enforcement of the governing documents at the Board's direction within the confines of the governing documents
- Provide professional guidance based on best practices & industry standards
- Provide training & education for board and committee members
- Collect assessments, monitor financial health, produce financial statements, and manage financial operations
- Administrative & clerical services
- Oversee common area maintenance & operations, including contracted or in-house services
- Fulfill terms of management agreement

## Responsibilities of Management

- Act in the best interest of the community
- Exercise due care and perform planning and oversight as defined in the management agreement
- Disclose any potential or perceived conflict of interest
- Provide for segregation of financial duties and prevent comingled accounts
- Provide accurate and timely financial statements for the Board's review
- Maintain duty of confidentiality
- Know and understand the governing documents & applicable laws
- Continue professional education
- Advise the Board using best practices and industry standards
- Uphold authority and role delegated to Management by the Board and/or governing documents
- Adhere to code of ethics – CAI & Company





LET'S WORK  
TOGETHER





# HOW TO HAVE A SUCCESSFUL PARTNERSHIP WITH MANAGEMENT

- Understand and respect roles & responsibilities
- Maintain professionalism, trust and respect
- Set clear expectations & achievable goals
- Develop a strong communication plan
- Remember this is a partnership, and collaboration is key!
- Maintain an open feedback loop
- Offer and receive constructive criticism
- Do not micromanage; allow your manager to do their job
- Hold each other accountable
- Understand the management agreement & revisit it should service needs change

# Q & A



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