

THE VALUE OF CREATING AND MAINTAINING AN HOA MAINTENANCE MANUAL & WHY SHOULD YOU SERIOUSLY CONSIDER HAVING ONE?

By Sara E. Barry - June 2019

One of the many things that devalues property values in an HOA is lack of maintenance. Some directors get on the board with their whole purpose being to “keeping the assessments down”. As fiduciaries, the board needs to look at the big picture, not their personal agendas. Yes, they need to make wise decisions when spending association money, hiring contractors and dealing with the association’s property, but always going for the lowest prices and putting maintenance off as long as possible are not wise decisions. HOAs are not a government agency. They are not required to take the lowest bid. And deferred maintenance will ultimately increase the cost to everyone just because someone(s) thought they were saving money NOW. Only thinking in the NOW will certainly get a homeowners association in trouble down the road.

As a Community Manager taking over a property where you must go through the dozens of boxes to find out any minute little thing about an association’s maintenance background can be very frustrating. How fortunate would it be if the Association had an up to date Maintenance Manual? Many of the high rises here in Las Vegas have a digitized system where you are signed up with a company with all this information and it doesn’t belong to a management company with proprietary software. It is called BuildingLink and currently runs in 4,845 buildings across 35 states and 32 countries serving 1,859,378 residents. To look at this system, go to www.buildinglink.com . This tends to be the “New School” vs. the “Old School” when I managed and had a binder that I could transfer to another company should the association leave to a new company. For on-site staff of large CIDs, high rises, etc, I can see that this New School concept would be perfect. Emergency Contact numbers, however, I used to keep in my car so that no matter where I was and got a call, I had the Emergency Numbers even if I didn’t have an internet connection and/or forgot my cell phone.

Having said that, what if you’re an association that does not have on-site staff and your board does not want to invest in this system? The binder is the way to go because maintenance continues to be a hot topic at HOA board meetings. It is not unusual for as many as 25 (or more) residents to attend and participate in maintenance discussions. A well-executed Maintenance Manual can help to keep the conversation focused and on topic. A Maintenance Manual is not only a record of what has been done in the past, but also guides the board’s future decision making as to how to proceed knowledgably in maintaining and preserving the many functioning components of an aging building or community.

One association has created a central repository or in their case, a 200-page book and it is a method of collecting and preserving maintenance items for current and future generation. How do you find someone to do this besides the Community Manager, who might be able do it, but.....? You can look for someone who wants to serve the HOA, likes to write and wants to be published, wants complete control over their work, likes to work alone without deadlines and wants to know how things work. Some reserve providers offer the ability to develop maintenance manuals for a community. It’s at a cost naturally, but those with the proper experience have the knowledge regarding the maintenance of common elements in a Common

Interest Community. Important to note also that the reserve study should be part of the maintenance plan and be a part of the manual.

Unless you are having this professionally developed, don't expect the manual to go from zero to 200 pages overnight. The one mentioned above grew over a multi-year period and is still regularly updated, which it should be done monthly. You can start by documenting a few procedures of significance to the HOA. An example would be looking at items in your reserve study scheduled for repair or replacement over the next few years. Anything the person responsible for creating this manual can do to learn what's happened in the past on these topics will become valuable to the board and homeowners as they look at completing reserve study tasks. As a part of this process, when you are having an updated reserve study done, think how much easier it would be to send the updated changes to the RS licensed specialist in Nevada vs. having to dig through 3-5 years of paperwork. You do a project and you write it into the book and keep for the reserve study update. Some reserve specialists can work with you on this project and provide you a document to start from on this process. Some boards/managers actually use the component pages from the study as their living maintenance document for reserve items. They update the pages as changes occur and provide these to the RS when performing the update. It does not hurt to ask the RS if they can provide a separate set of component pages for this purpose.

If you are developing this manual yourself (the Association), begin with reasonable, easily achieved expectations. Aim for a document with a reasonable known list of items your responsible person(s) is comfortable with researching and documenting.

A book in digital format has a significant advantage, especially when compared to papers in folders placed within file cabinets. In digital format, hard copies are easily produced and can be placed in the hands of multiple parties, whether board members, a maintenance committee or HOA employees. An up to date copy of this digital book can be kept on the HOA website, meaning that a searchable version of the documents for interested parties.

Usually, content for your manual will be created when there is a maintenance issue that is referred to the maintenance committee, if you have one. For example, a manual can answer questions like the following:

- I. What needs to be done when the "trouble" light goes on in the fire protection system??
- II. What vendor do we call for problems with the elevator or air conditioners (if you don't have elevators)?
- III. How do you review video on any monitoring systems? (Don't use the word security.)
- IV. How do you get a new mailbox key?
- V. What light bulbs do we use in the buildings and in different areas.

Going through the reserve study and maintenance files will help you identify those issues that have been dealt with in the past and can be included in the book.

If you can find the right person who has the knowledge and ability and wants to make a significant contribution to the HOA, you can have a resource that serves your board and members today and in the future. Having the details of HOA maintenance at your fingertips will be of significant value and will help to meet the maintain challenges all communities face.

Below is a short list that may be included in your maintenance manual for all types of associations, not just hi-rises:

- I. Unit square footage if in units other than single family homes.
- II. Air Conditioning Systems/Heating Systems
- III. Community Maps and Drawings (if available) ... kept in a separate location.
- IV. Carpet
- V. Carts (golf carts, maintenance carts)
- VI. Computers
- VII. Copiers/Printers
- VIII. Internet Systems electrical
- IX. Emergency Procedures Manual
- X. Fireplace/Chimney's
- XI. Fire protection services
- XII. Garage information
- XIII. Hot water Heaters
- XIV. Keys (buildings and mailboxes)
- XV. Laundry Rooms
- XVI. Light bulbs and Fuses
- XVII. Outdoor Gardens
- XVIII. Painting
- XIX. Pest Management
- XX. Private Sewer Lateral Program
- XXI. Roofs
- XXII. Sewer Lines
- XXIII. Signage
- XXIV. Solar Energy
- XXV. Sq. Footage of Paved Areas
- XXVI. Storage rooms
- XXVII. Ventilation Systems
- XXVIII. Video systems
- XXIX. Water Storage Tanks
- XXX. Website Internet Services
- XXXI. Website
- XXXII. What to do When
- XXXIII. Windows

There are obviously a lot of things left out on the above listing, but you can see that as a new manager coming aboard, wouldn't it be refreshing to have such a publication available vs. having to spend hours in boxes trying to find who did what in the past, etc.