

Self-Managed HOA Administrative Checklist

For boards that want to govern the association without personally doing every recurring task.

Self-management works best when the board separates governance from administration. Directors make the decisions. A repeatable system handles records, billing, notices, vendors, schedules, and follow-through.

OWNER & UNIT DATA

- ☐ Current owner contact information
- ☐ Tenant/occupancy information where applicable
- ☐ Emergency contacts
- ☐ Parking/storage assignments
- ☐ Move/lease records
- ☐ Open balances and payment status

FINANCIAL ADMINISTRATION

- ☐ Assessment schedule is current
- ☐ Approved charges are entered correctly
- ☐ Invoices are collected and routed for approval
- ☐ Payments and deposits are documented
- ☐ Monthly reports are produced on a set schedule
- ☐ Delinquencies follow one written process

VENDORS & MAINTENANCE

- ☐ Vendor list and contracts are current
- ☐ Certificates/insurance records are tracked
- ☐ Routine maintenance calendar exists
- ☐ Appointments and access are scheduled centrally
- ☐ Open work has a status and follow-up date
- ☐ Recurring problems have a documented history

BOARD RECORDS

- ☐ Governing documents are organized
- ☐ Approved minutes are easy to find
- ☐ Policies and rules are current
- ☐ Board decisions and action items are tracked
- ☐ Insurance and major contracts are stored centrally

- ☐ New directors can find the operating history without asking one person

COMMUNICATION

- ☐ Owners know where to submit requests
- ☐ Routine notices use a consistent channel
- ☐ Board-only discussions stay separate from owner requests
- ☐ Emergency contacts and procedures are documented
- ☐ Association communications are retained with the association records

A SIMPLE TEST

If the president, treasurer, or secretary disappeared for 60 days, could another board member find the records, understand the finances, see every open issue, and keep the association running? If not, the board needs a stronger administrative system.

PRG offers an administrative-support level for smaller associations that want to keep board control while outsourcing HOA Start, records, billing workflow, vendor scheduling, and recurring follow-through.

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