



**Eastern Panhandle Organization
of Homeowners Associations**

**Berkeley * Grant * Hampshire * Hardy
Jefferson * Mineral * Morgan * Pendleton**

WORKSHOP-SEMINAR

**HOMEOWNERS - EXECUTIVE BOARDS - OFFICERS - MEMBERS
Presented by Ed Thomas & Richard Sussmann**

Sponsored by Property Management People, Inc., AAMC ®
An Accredited Association Management Company by
Community Associations Institute

**Saturday September 14, 2013
9AM - 2PM**

AGENDA

9:00 AM **Welcome and Introductions**

9:15 **Legal Foundation of HOAs and the Hierarchy of Governing Documents**

Federal, State and Local Laws

WV Uniform Common Interest Ownership Act – Chapter 36B

WV Non-Profit Corporations Act – Chapter 31E

Articles of Incorporation

Covenants, Conditions & Restrictions

Rules & Resolutions, Guidelines

WV HOA Laws & Contracts

General Issues

WV Uniform Common Interest Ownership Act – Chapter 36B

WV Non-Profit Corporations Act – Chapter 31E

Contracts – Formation to Enforcement

Real Estate – Ownership vs. Restrictions (easements and right-of-ways)

Collections

Federal Fair Debt Collections Practices Act

WV Consumer Credit Protections Act

The Impracticality/Impossibility of Dissolution

10:15 **BREAK** *light refreshments provided*

10:30 **HOA Organization, the Board, Committees, Management and their Roles**

The Association, the Board, Committees and Members

Fiduciary Duties – Duty of Care & Loyalty

Duties, Roles and Expectations of the Board, Committees & Management

Duties, Roles and Expectations of the Members

Conflicts of Interest & Tips

Duties, Roles and Expectations of Management Agent

Helpful Meeting and Hearing Tips

Meeting Types and Notice Requirements

Board & Committee Meetings

Violation Hearing

The Professional Team

Know when to seek and rely on the advice of Professionals

- 12:00 **LUNCH BREAK** *light refreshments provided*
- 12:30 **HOA Finances**
- Creating a Budget**
- Overview of Budgeting Objectives
 - Mandatory vs. Discretionary Line Items - Obligations, Need & Expectations
 - Historical Trend vs. Zero Based Budgeting – Pros and Cons
 - Seven Steps to Develop a Budget
 - How is a Budget Adopted?
 - Creating a sample budget
- Reading & Understanding Financial Statements**
- Accrual and Cash Accounting
 - Assets & Liabilities
 - Sample Financial Statement
- 1:45 **Question & Answer Session**
- 2:00 PM **Adjourn**
- REMINDER ***Please complete & return your Workshop Evaluation at the door when leaving***



Eastern Panhandle Organization of Homeowners Associations, Inc.

SHARING INFORMATION - INCREASING KNOWLEDGE

UPCOMING DATES

A meeting with representatives from **Frontier and Comcast** will be held on

3PM Thursday September 19, 2013

Charles Town Library basement meeting room
200 East Washington Street
Charles Town, WV 25414

The public is invited to comment and the Jefferson County Commission will try to resolve some of Jefferson County's problems with internet service.

NEXT EPOHOA MEETING

9AM-Noon Saturday September 21, 2013

St. Leo's Catholic Church

2109 Sulphur Springs Road, Inwood

Jefferson / Berkeley County

TIP : When your individual HOA is represented at an EPOHOA meeting your topic(s) will be included for discussion.

EPOHOA.org

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EPOHOA is a non-profit 501(C)(3) organization
which does not endorse any legal council, business or political party