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Task	Role	Name	Accountability Measure	Bylaws or Best Practice Guidance	
Schedule Board Meetings	President	Perry Swaim	No less than Quarterly	Bylaws	
Create Board Meeting Agenda	President	Perry Swaim	Minimum 10 days ahead with topic background	Board Secretary should Assist	
Facilitate Board Mtg. Actions	President	Perry Swaim	Meet standards for vote approval	Bylaws	
Schedule Annual HOA Mtg.	President	Perry Swaim	60+ days in advance notification to HOA members	Bylaws – Coordinate with Secretary and Accounting Service	
Annual HOA Meeting Logistics	President	Perry Swaim	45 days in advance plan set-up, catering, etc	Best Practice – Can involve substantial delegation to Board	
Primary contact and approval for sustainment contracts: Security, Insurance, Website, Road Maint, Legal and CPA support	President	Perry Swaim	Timely research, competitive bidding (where feasible), assessment. Proposal request with justification presented to Full Board for Approval	VP, Treasurer, Secretary, At-large member and other CMF Board Auxiliary members should be engaged.	
Standing Committee: Finance Committee	Treasurer	John Belton	New Standing Committee as oversight to HOA Finances	Eric Clement as At Large Board Oversight	Non Bd Director Rep Dennis Taylor

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Bank Account oversight	Treasurer	John Belton	Maintains online view access to all HOA accounts	Accountant and Board President also have access	
Bank Account Monthly Reporting	Treasurer	John Belton	Produces from online access, monthly summary of accounts for President	May benefit from a Finance Committee with Bd.Mbrs/others	
Performance of Budget versus actual revenue & expenses	Treasurer	John Belton	Establishes format from Champion CPA to track performance.	Determines whether Monthly or Quarterly is most useful	
Produce budget verus Actual results	Treasurer	John Belton	Monthly? Quarterly?	Line item detail or by expense and revenue Categories.	
Identification of any transaction request that is unbudgeted	Treasurer	John Belton	President approval required and documented before sent to Champion CPA for processing	Request if over a threshold ($500?) benefits from Board Approval	
Coordination on annual audit	Treasurer	John Belton	Reviews and Signs the Engagement letter for the Audit Work Review draft produced by CPA. Edit and recommend Bord approval before signing the document.	Annual task – may require treasurer and President to provide commentary for website.	
Board Meeting Minuets	Secretary	Susan Catoe	Produce the meeting notes within a week following the meeting in a format for uploading to the CMF HOA Website	Required task in Bylaws. Format should include logistics (date,time,location), attendees and official actions approved.	

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Board liaison/facilitator for the ARC	Vice-President	Lou Pagano	Facilitator for the ARC meeting to ensure that documentation is professional, complete and actionble	Does not need to be the VP if another Board member (e.g. At-larger member has skills and commitment to serve in this role.	
Other Tasks/Roles performed by HOA Board: Website Administration NC Secretary of State registered agent for the LLC Capital Projects Social Event scheduling and logistics	Board Support role – Skills and commitment of time req. LLC Compliance Standards	Perry Swaim Bruce Anderson TBD at time of approval TBD (as needed)	Oversight of Annual Maintenance Contract Oversight of Financial and operational sandards. Transparancy guidelines in information Project Manager Success in achieving budgetary targets and operational benefits Budget Sufficiency and control. Participation rates and owner/guest feedback	Requires Tech. Skills and also availability Current Registered Agent for the HOA will establish overight standards in 2026 May be ad hoc committee, rather than a single person	