Village Grande at English Mill

PROCEDURE 107 – Delegation of Authority

Process/Procedure Owner: HOA President

## Purpose

This procedure describes who has the authority to award contracts or Purchase Orders for materials and services and to authorize payment of an invoice or other authorized expense.

## Roles and Duties

**Board of Trustees** – Authorize any Contracts, Purchase Orders or payment of an invoice or other authorized expense.

**Site Manager** – Prepare recommendation for purchase when required and authorize those Contracts and Purchase Orders specifically defined herein.

**Trustee** - Authorize those Contracts and Purchase Orders as specifically defined herein.

**1.3 Procedure**

In accordance with the By Laws of the HOA, the Board of Trustees is responsible to authorize all expenditures of the HOA. In an effort to provide for the efficient conduct of business, the Board of Trustees may approve certain purchases in the Budget Approval process and delegate the actual award of certain contracts and purchase orders. The level of that delegated authority is defined in Table 1 (attached).

All invoices are to be reviewed by the Site Manager to assure that the product or service was satisfactorily delivered and that the invoice is in accordance with the terms of the Contract or Purchase Order. The Site Manager is responsible to resolve discrepancy with the supplier/contractor; if the Site Manager is unable to reach a satisfactory resolution, the issue shall be referred to the Board of Trustees. Upon approval of the invoice the payment (check) shall be prepared and approved by at least one member of the Board of Trustees. Invoices greater than $5000 shall be approved by at least two members of the Board of Trustees.

## Definitions and Acronyms

**HOA** – Village Grande at English Mill Homeowners Association Inc.

**Site Manager**- The person responsible for the day to day administration of the HOA.

**VGEM** – Village Grande at English Mill

## Attachments

Table 1 – Authorization Limit for Purchase

## References

## Inquiries

Questions regarding this procedure should be directed to the HOA President.

**Table 1 – Authorization Limit for Purchase**

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| --- | --- | --- | --- |
|  |  | **Site Manager** | **Any Individual Trustee** |
| **Budget Item No.** | **Budget Item Description** | **Authorization Limit to Purchase** |  |
|  |  | **If Within Approved Annual Budget** | **If Within Approved Annual Budget** |
| 5090 | Office Supplies | $400/Mo | $1000/Mo |
| 5195 | Other Administrative Services | $400/Mo | $1000/Mo |
| 5215 | Postage | $400/Mo | $1000/Mo |
| 6625 | HVAC Supplies/Repair & Maintenance | $2000/Mo |  |
| 6635 | Janitorial Supplies & Maintenance | $400/Mo | $1000/Mo |
| 6700 | Pool Supplies/Repair & Maintenance | $2000/Mo |  |
| 6710 | Recreation Supplies/Repair & Maint | $400/Mo | $1000/Mo |
| 6795 | Other Supplies/Repair & Maintenance | $400/Mo | $1000/Mo |