



CITY OF  
**CHARLESTON** SC

Economic & Neighborhood Services

**CAROLOPOLIS**  
**CONDITA A.D.**  
**1670**

# *Neighborhood* **HANDBOOK**

*Version 2025 Edition*

# TABLE OF CONTENTS

## 01

### **Introduction**

- 1.1 What is the Neighborhood Council Program?
- 1.2 What is the Neighborhood Commission?
- 1.3 What is a Neighborhood Association?
- 1.4 What is a Homeowners/Property Owners Association?
- 1.5 What is the Neighborhood Services Office?

## 02

### **Neighborhood Council Guidelines**

- 2.1 What does my organization need to join the Neighborhood Council?
- 2.2 How do we apply to join the Neighborhood Council?
- 2.3 What do associations in the Neighborhood Council do?
- 2.4 What are the benefits to joining the Neighborhood Council?



# 03

## **Start Your Neighborhood Association**

- 3.1 Creating your “why”
- 3.2 Practical tips for building and maintaining membership
- 3.3 Holding elections
- 3.4 I got elected president... now what?
- 3.5 Creating by-laws
- 3.6 Liability
- 3.7 Communication & Outreach

# 04

## **Fundraising & collecting contributions**

- 4.1 Fundraising for beginners
- 4.2 Bookkeeping

# 05

## **Meetings**

- 5.1 Preparing for a meeting & building an agenda
- 5.2 How to build a meeting agenda
- 5.3 After the meeting
- 5.4 General Tips
- 5.5 Robert’s Rules of Order

# 06

## **Problem solving at the neighborhood level**

- 6.1 Navigating Government Services: Troubleshooting
- 6.2 Navigating Government Services: Who to call for what
- 6.3 Citizen Services Desk
- 6.4 Contact your elected officials
- 6.5 Other numbers to know





01

# Introduction

---





## 1.1 What is the Neighborhood Council Program?



The Neighborhood Council Program offers Neighborhood Associations the opportunity to meet with the Mayor and key city staff throughout the year in regularly scheduled sessions to share information, report concerns and make suggestions that will improve the quality of life for residents and the city as a whole. There are currently seven sectors of neighborhood presidents in geographically connected areas of the city. There are two sectors downtown, three sectors in West Ashley, one comprising Daniel Island and Cainhoy, and one sector comprising James and Johns Islands.

The City of Charleston has encouraged neighborhoods to organize into neighborhood associations by recognizing them as members of the Neighborhood Council. This is not a legal designation—it is a designation made by community members appointed to the Neighborhood Commission. In order to be recognized as a member with standing in the Neighborhood Council, an association has to meet certain criteria. There are more than 120 neighborhood associations with standing within the Neighborhood Council.



## 1.2

# What is the Neighborhood Commission?

The Neighborhood Commission is the governing body of the Neighborhood Council. It is made up of community members appointed by City Council members, and one at-large member appointed by the Mayor. If you are interested in joining the Neighborhood Commission, please reach out to your City Council member. Members of the Neighborhood Commission are often current or past Neighborhood Association presidents, but this is not a requirement.

Members of the Neighborhood Commission meet annually to review applications for standing within the Neighborhood Council.

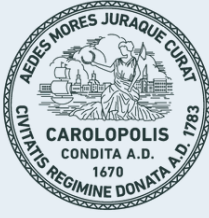
## 1.3 What is a Neighborhood Association?

A Neighborhood Association is any independent, organized group of people who own, live, or have a business in a particular neighborhood. A neighborhood association does not necessarily have a legal designation. It can be a homeowners association, a civic group, or a local development corporation. It does not have to be incorporated as a nonprofit or legal entity.

## 1.4 What is a Homeowners/Property Owners Association?

A homeowners association is a legally incorporated organization associated with a neighborhood, subdivision, or condo building. HOAs usually have “covenants” or agreements that homeowners sign when they purchase a property in the neighborhood. An HOA may apply for standing within the Neighborhood Council. Standing within the Neighborhood Council does not change the legal status of the organization.

Neighborhood Services is the City of Charleston’s liaison office to the Neighborhood Council and Neighborhood Commission. We work to help neighborhood associations solve problems and build organizational capacity.



# CITY OF CHARLESTON SC

## Economic & Neighborhood Services



### 1.5 What is the Neighborhood Services Office?

**Neighborhood Services is an office in the Division of Economic & Neighborhood Services.**

We help you and your neighborhood access information about navigating City services.

**Neighborhood Services serves City of Charleston residents by being a trusted partner to neighborhoods with the intent of promoting equitable access to resources, civic engagement, and community decision-making through education, dialogue, and outreach.**

We envision a city where residents feel empowered to participate in community decision-making processes and have equitable access to City resources.

#### **Our programs include:**

- Managing the City's relationship with neighborhood associations in the Neighborhood Council.
- Facilitating access to mediation services for member associations in the event of internal conflict.
- Coordinating the annual Robert Ballard Award for Volunteerism.
- Organizing quarterly litter cleanups across the City, in partnership with Keep Charleston Beautiful.
- Presenting quarterly Neighborhood Spotlights, intended to highlight the important work of neighborhood associations across the city.



# 02

## Neighborhood Council Guidelines







## **2.1**

### **What does my association need to join the Neighborhood Council?**

In order to join the Neighborhood Council, an association needs to have:

- Neighborhood boundaries, agreed on by residents, which do not overlap with another association's boundaries. At least 50% of the area within the neighborhood's boundaries should be within City jurisdiction.
- At least 20 residents that are willing to sign a petition form indicating support for the organization's request to join the Neighborhood Council.

As well as by-laws containing the following:

- Statement of organizational purpose, or a mission statement.
- Method of election of officers.
- Description of officer terms and term limits.
- Establishment of a quorum for voting.
- Definition of membership (the City recommends that membership be open to all residents over the age of 16, not just homeowners).
- Statement of non-discrimination.
- Statement that neighborhood association will refrain from partisan activity.
- General meeting schedule.



## 2.2

# How do we apply to join the Neighborhood Council?

**Step 1:** If you already have a neighborhood association, contact the Neighborhood Services office to notify us that you are beginning your application packet! Let us know the neighborhood boundaries that you have in mind, so we can check that you don't overlap with another organization. Email [neighborhoods@charleston-sc.gov](mailto:neighborhoods@charleston-sc.gov) to request an application form.

If you don't already have a neighborhood association, reach out so we can help assist you in getting started!

**Step 2:** Print the petition form to gather signatures from your neighborhood!

**Step 3:** Review your bylaws to make sure they include the bullet points in the guidelines. If any component is missing, work with your neighborhood to either amend your bylaws, or write a letter indicating your neighborhood's resolution to do so.

**Step 4:** Put your packet together! It should include your signed petition form and your bylaws, and any additional materials that you have discussed with the Neighborhood Services office. You can email the packet to [hopkinsr@charleston-sc.gov](mailto:hopkinsr@charleston-sc.gov) or drop it off at 200 Meeting St, Ste 301. The Neighborhood Commission will review the application during their annual meeting.





## 2.3

### **What do Neighborhood Associations in the Neighborhood Council do?**

**The Neighborhood Council Guidelines request that associations in the Neighborhood Council do the following:**

- Keep their membership abreast of notifications from the City.
- Organize community events, projects, or programs.
- Hold at least one general membership meeting per year, and give residents ample time and notice to attend that meeting.
- Follow its own by-laws, and provide a current copy of those by-laws to the Neighborhood Services Office.
- Provide notice to the Neighborhood Services Office of any changes to the board or by-laws.



## 2.4

### **Benefits of joining the Neighborhood Council:**

- Official recognition provides credibility when engaging with city staff, elected officials, and community partners.
- Direct channel for receiving timely updates and notifications from the City.
- Guidance from Neighborhood Services staff on city services, programs and community engagement.
- Opportunity to collaborate with other neighborhood associations.

# 03

## Start Your Neighborhood Association







## 3.1 Creating your “why”

**First of all, don’t go it alone! Form a group of residents to join your team and help you start your association.** It’s important to consider why you would like to form an association (or why your association already exists) so that you can narrow down what your group would like to achieve, and where you should put your efforts. The “why” should inform your organization’s mission statement, which should go at the beginning of your by-laws.

As a group, ask yourselves the following questions:

<b>CORE PURPOSE</b>	Why should we have a neighborhood association?
<b>COMMUNITY FOCUS</b>	Who do we serve?
<b>GUIDING VALUES</b>	What are our shared values? (For example, safety, inclusion, advocacy, or cleanliness.)
<b>DESIRED IMPACT</b>	What impact do we want to have on our neighborhood, community, and city?

**Combine elements of your answers to create your mission statement.**

**Formula:** “We exist to [core purpose], serving [community focus] through [value, so that we can [desired impact]].”

**Example:** “The Bayview Neighborhood Council exists to create a safer, cleaner neighborhood through engagement, volunteerism, and inclusivity, so that we can improve quality of life for everyone.”

For a downloadable mission statement brainstorming worksheet, go to

[www.charleston-sc.gov/neighborhoodtemplates](http://www.charleston-sc.gov/neighborhoodtemplates).



## 3.2

# Practical tips for building & maintaining membership.

When starting out, it can be overwhelming to think about building and maintaining membership. Just remember that the more people you recruit, the easier it is to affect change. Also, the more people you recruit, the more you can delegate! A strong, active membership base is the foundation of a successful neighborhood association. To grow and retain members, focus on **outreach, inclusivity, engagement, and ongoing communication**.

Below are practical strategies to build and maintain momentum.

- **Make your words count:** People join and stay in associations when they understand why the organization matters. That's why your mission statement is important—it helps you remember the “why” of the organization.
  - Make sure that each communication with residents (meetings, email, flyer, events, etc) says something valuable or provides something important. For example, an association in a low-lying area could invite someone from the City's Stormwater Department to speak about flood mitigation at a meeting.
  - Keep it short: make sure to convey important information with few words in emails and flyers. During meetings, stick to the agenda and try not to go over your scheduled time.
- **Reach out**
  - Remember that not everyone uses the same methods to communicate. Different groups might respond to different modes of communication. Some people are comfortable with technology, and some people prefer face-to-face interactions or phone calls. Utilize texts, phone calls, flyers, door hangers, social media, email newsletters, and/or welcome.
  - Pro tips:
    - Free design software like Canva.com can make creating flyers and social media posts easier!
    - Keep it simple! Don't use more than 2 or 3 fonts or colors on a flyer, and proofread your design for legibility.
    - Keep it brief! People are bombarded with new information constantly—stick to the “who, what, when, where”



## 3.2

# Practical tips for building & maintaining membership (continued)

- **Make it easy**
  - Offer online and in-person sign-ups when possible. Check out [Google Forms](https://workspace.google.com/products/forms/) [https://workspace.google.com/products/forms/] to automate membership forms.
  - Keep dues affordable (or optional)
- **Ask for input and help**
  - People like to feel needed. Invite members to join or lead projects. Listen to their ideas, and as much as possible, let people work on projects that match their interests.
  - Acknowledge contributions publicly and regularly.
  - Cultivate leaders. For tips about developing a leadership pipeline, go to [www.charleston-sc.gov/neighborhoodtemplates](http://www.charleston-sc.gov/neighborhoodtemplates).
- **Keep it light:** While neighborhood associations can deal with serious topics, it's important to create a welcoming, friendly environment and culture.
  - Set expectations: At the beginning of meetings, whether in person or zoom calls, talk about how the group will communicate.
  - Assign a greeter to welcome attendees and have them sign in before meetings. This is also a great way to collect contact information for your mailing list!
  - If you have an online presence, like a Facebook page, make sure discussions are moderated to ensure civility.
  - Schedule a social hour for after association meetings. Let residents know ahead of time that they can bring a snack to share or a beverage (depending on the venue) and socialize after the association meeting. This helps neighbors build trust, which is important when groups have to solve problems together.
- **Follow Up & Follow through**
  - Provide updates on projects and advocacy efforts!
  - Make sure to build your contact list so that you can follow up with people!
  - Share wins, even small ones!
  - Ask for feedback, and act on it!

## 3.3 Holding Elections

### 1 VERIFY QUORUM

Confirm that the minimum number of members required to conduct business (as defined in your bylaws) is present.

### 2 APPOINT A TELLER'S COMMITTEE

The chair appoints impartial members to collect and count votes. *Tellers should not be candidates for office.*

### 3 OPEN NOMINATIONS

The chair announces the opening of nominations for each office.

Nominations can be made by members from the floor or self-nomination.

No second is required for nominations

The chair repeats each nominee's name to the assembly.

### 4 CLOSE NOMINATIONS

After allowing sufficient time, the chair asks if there are further nominations.

If none, the chair declares nominations closed.

Alternatively, a member may move to close nominations, requiring a second and a two-thirds vote to pass.

For templates to help you get started, go to [www.charleston-sc.gov/neighborhoodtemplates](http://www.charleston-sc.gov/neighborhoodtemplates)



## 3.3 Holding Elections (Continued)

### 5 CONDUCT THE ELECTION

If your bylaws specify a voting method, follow it. Otherwise, common methods include:

Voice vote: suitable when only one candidate is nominated.

Ballot vote: Ensures secrecy; members write their choice on paper.

Roll call vote: each member states their vote aloud.

For ballot votes:

Ballot vote: Ensures secrecy; members write their choice on paper.

Tellers collect and count the ballots.

### 6 ANNOUNCE THE RESULTS

The teller's committee reports:


Total number of votes cast

Number of votes needed to elect (majority)

Number of votes each candidate received

The chair announces the results and declares the elected individuals.

## 3.3 Holding Elections (Continued)

- 
- 7 HANDLE SPECIAL SITUATIONS**
    - If no candidate receives a majority, repeat the voting process.
    - If a tie occurs, conduct another vote between the tied candidates.
    - If a candidate is elected to multiple positions, they choose one, and the other position is re-voted.
  - 8 RECORD THE PROCEEDINGS**
    - The secretary records:
      - All nominations.
      - Voting results.
      - Any motions made during the election process.
    - Ensure minutes reflect the election accurately for organizational records.
  - 9 AFTER THE MEETING**
    - After the election, it is helpful for the incoming and outgoing officers to meet and review the association documents, and to talk through any issues that the neighborhood is facing. This should take place before the new board members' term starts.
    - Utilize your newsletter, social media, or email blast to inform members who did not attend of the results of the election.



### 3.4

## I got elected president of my neighborhood association. Now what?

### **Congratulations on your new role as neighborhood president!**

As you know, your neighborhood association is a member of the City of Charleston's Neighborhood Council, and the office of Neighborhood Services is the City's liaison with neighborhood leadership. Our division, Economic & Neighborhood Services, is part of the Community Services Section.

We ask neighborhood presidents to be the City's contact so we can notify associations about disruptions to daily life (street closures, etc), new programs or changes to services, or opportunities for public input.

The City sends out an official newsletter on a bi-weekly basis, which you can subscribe to at [charleston-sc.gov](http://charleston-sc.gov). Please read these newsletters and pass on any information you think the residents of your neighborhood might find important. You are also welcome to use the printer in our division office for neighborhood association newsletters or flyers as long as you provide the paper. We also send association presidents information about upcoming street closures when we are made aware of them, so that you can let your residents know about disruptions to traffic.

**Note: At the end of your term, please notify [neighborhoods@charleston-sc.gov](mailto:neighborhoods@charleston-sc.gov) that you are stepping down and send contact information for the new president.**



## **3.4 I got elected president of my neighborhood association (Continued)**

### **Step 1: Review key documents & get in touch**

- Familiarize yourself with your association's governing documents and the Neighborhood Council Guidelines.
- Make sure to send your contact information (address, phone number, and email) to [neighborhoods@charleston-sc.gov](mailto:neighborhoods@charleston-sc.gov).
- Bylaws: Review your association's by-laws so that you understand the rules governing board operations and member rights.
- If your neighborhood association is also a legal HOA or has incorporated as 501c3 or 501c4, you should also review your HOA covenants or articles of incorporation.
- Financial Records: Review the current budget and financial statements to ensure transparency and accountability.
- Meeting Minutes: Read recent meeting minutes to stay informed about ongoing discussions and decisions.
- Brush up on Roberts Rules of Order so that you feel confident about following them while running the meetings.

### **Step 2: Meet your board**

Arrange a meeting with fellow board members to:

- Introduce yourselves and share your backgrounds.
- Discuss each member's roles and responsibilities.
- Set expectations for communication and collaboration.

For templates to help you get started, go to [www.charleston-sc.gov/neighborhoodtemplates](http://www.charleston-sc.gov/neighborhoodtemplates)



## 3.4 I got elected president of my neighborhood association (Continued)

### Step 3: Conduct a board orientation

Organize an orientation session to:

- Review the association's history, mission, and goals.
- Discuss board policies and procedures, and review by-laws, applicable legal documents, Roberts Rules of Order, and the Neighborhood Council guidelines.
- Familiarize the board with financial management practices.
- Set norms and expectations for board conduct.

### Step 4: Plan your first meeting

Prepare for your inaugural meeting by:

- Creating a clear agenda with input from board members.
- Ensuring all necessary materials are available (e.g., bylaws, financial reports).
- Make a list of things that need to happen to prepare for the meeting, and split up the responsibilities. For example, notifying residents of the upcoming meeting, securing a venue, creating a flyer, etc.
- Setting the tone for open communication and collaboration.
- For more resources, go to [www.charleston-sc.gov/neighborhoodtemplates](http://www.charleston-sc.gov/neighborhoodtemplates)

### Step 5: Communicate with residents & the city

Establish transparent communication channels:

- Make sure that you have signed up for the City's email newsletter. Skim the newsletter when it arrives in your inbox, and send along pertinent information to your residents. The Office of Neighborhood Services will also send information directly to you for dissemination to your residents when they become aware of changes to programs or services in your area.
- Send out newsletters or emails introducing yourself and outlining your vision.
- Utilize social media platforms to keep residents informed and engaged.
- Encourage feedback and suggestions from the community.



## **3.4 I got elected president of my neighborhood association (Continued)**

### **Step 6: Lead by example**

Demonstrate effective leadership by:

- Being punctual and prepared for meetings. Arrive early to make sure you have everything you need and the room is set up.
- Actively listening to residents and board members.
- Upholding the association's values and mission in all actions.

### **Step 7: Utilize available resources**

Take advantage of local resources:

- Contact the City of Charleston's Neighborhood Services Office for support and training opportunities.
- Attend workshops and conferences to enhance your leadership skills. For past workshops, go to [www.charleston-sc.gov/neighborhoods](http://www.charleston-sc.gov/neighborhoods)
- Get up to date on what's going on in the City of Charleston, and how the City of Charleston works to serve you how your residents can get involved, build community and have their voices heard.

### **Step 8: Set goals and priorities**

Work with your board to:

- Identify key issues and opportunities in the neighborhood.
- Develop a strategic plan with clear objectives and timelines.
- Regularly assess progress and adjust plans as needed.

**Remember, your role as president is to facilitate collaboration, ensure transparency, and serve the best interests of your community.**  
**Best of luck in your new position!**



## 3.5

# Creating by-laws

By-laws are the rules your association agrees to follow. They define how your group operates, makes decisions, and ensures fair participation. Good by-laws help prevent confusion and conflict, and make your group stronger.

### ➤ Step 1: Form a by-laws committee

Invite a small group of residents (3-7 people) to draft the by-laws.

Include board members and regular residents for a balanced perspective.

Set a timeline for meetings and drafting.

### ➤ Step 2: Brainstorm what your by-laws should cover

Hold a committee meeting (or two) to discuss:

What decisions the board can make vs. members.

How often meetings happen, and how they're run.

Who can be a member, and how to join.

How elections work.

Quorum and voting rules.

Fiscal policies and responsibilities.

Use sample bylaws from other neighborhood groups or city guidance as a starting point.

### ➤ Step 3: Draft the by-laws

Assign one or two committee members to write the first draft.

Keep language simple and clear.

Use headings and short sections so it's easy to read.

Number each article/section for easy reference.

## 3.5 Creating by-laws (Continued)

### ➤ Step 4: Share and get feedback

Send the draft to board members and residents.

Hold a community meeting or listening session to walk through the draft.

Ask for feedback: What/s confusing? What's missing? What feels unfair?

Take notes and revise accordingly.

### ➤ Step 5: Finalize the draft

Make edits based on community feedback.

The by-laws committee should meet once more to approve a final version to present.

### ➤ Step 6: Vote to adopt the by-laws

Hold a special meeting or use a general meeting for the vote:

Share the final by-laws at least 7 days in advance.

Review major sections aloud before voting.

Use simple voting rules: majority of members present must approve.

Consider paper ballots or a show of hands. Record the vote in meeting minutes.

For templates to help you get started, go to [www.charleston-sc.gov/neighborhoodtemplates](http://www.charleston-sc.gov/neighborhoodtemplates)





## 3.5 Creating by-laws (Continued)

### ➤ Step 7: Distribute and store the by-laws

Share the adopted by-laws with all members (print, email, or online).

Keep a signed, dated copy with board records, and send a digital copy to the Office of Neighborhood Services.

Refer to them at meetings as needed.

### ➤ Optional: Schedule a by-laws review

Add a clause requiring review every 2-3 years.

By-laws should grow with your neighborhood!







## 3.6 Liability

A provision can be placed in the bylaws to indemnify board members in the unlikely event that they are sued as a result of their service. Indemnification promises that the corporation will repay defense and/or judgment costs. However, this is irrelevant if the organization does not have adequate funds. Therefore, larger organizations or associations who become non-profits usually carry directors' and officers' liability insurance. To protect board members from potential personal liability:

- Hold regular meetings and keep members well informed.
- Use a dependable system for keeping detailed minutes that records which members attend and the nature of their discussions.
- Obtain adequate insurance coverage for all activities sponsored by your organization. For an additional fee, several individual homeowners' policies can provide coverage for the policyholder's volunteer activities. Check with your insurance agent to see what is available.

**If you are concerned about liability, your organization should consult a lawyer.**





## 3.7

# Communication & Outreach

### Communication Is Connection: Outreach That Builds Stronger Neighborhoods

**Neighborhoods don't thrive in silence.** They thrive on communication, trust, and knowing who to call when it counts.

Effective communication is the heartbeat of a successful neighborhood association—it keeps residents informed, involved, and ready to act when needed.

#### Why Communication & Outreach Matter

- **Keep Everyone in the Loop:** From upcoming meetings to boil-water advisories, well-run associations use newsletters, email lists, signs, and social media to make sure no one is left out.
- **Build Trust and Belonging:** Clear and regular outreach helps neighbors feel welcome, informed, and part of something bigger—whether they've lived on the street 20 years or just moved in last week.
- **Mobilize in a Moment:** When emergencies strike—floods, power outages, or road closures—fast, reliable communication can save time, reduce confusion, and even save lives.
- **Guide Local Advocacy:** An informed community is an empowered one. Outreach helps residents understand how to speak up about zoning, safety, infrastructure, and development.

#### Tools that make a difference:

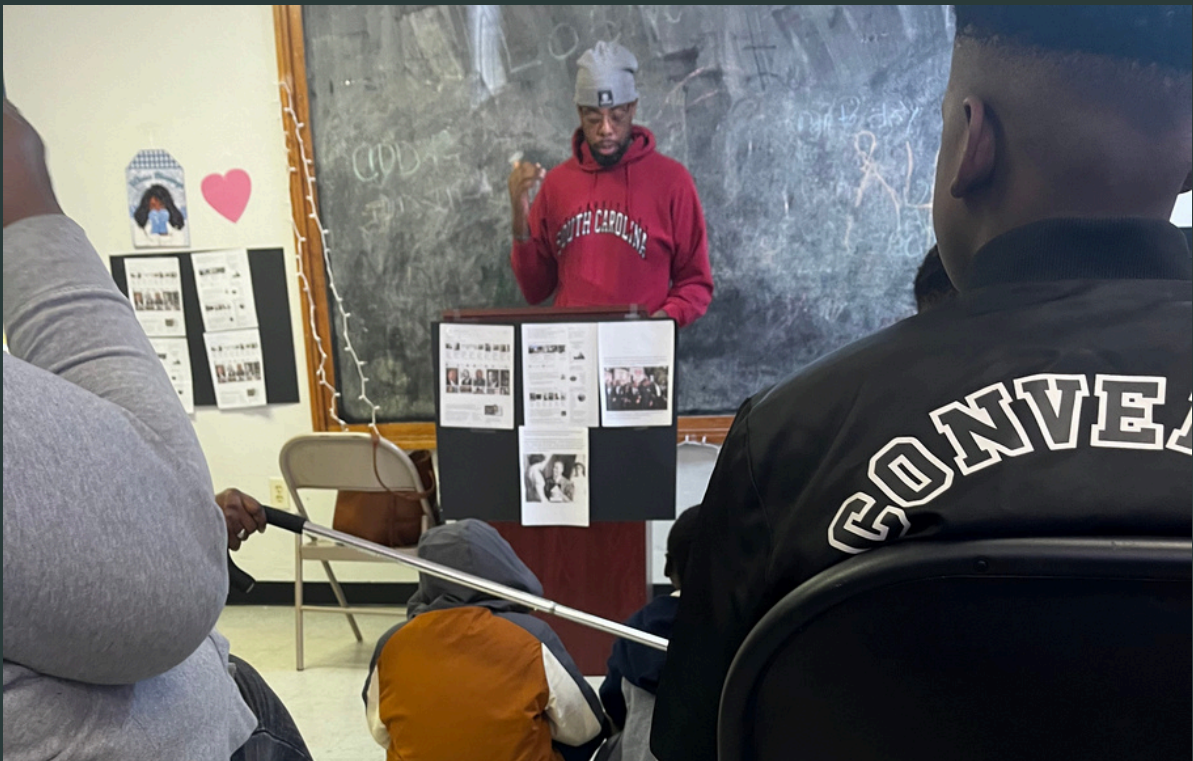
- 📄 Print & Email Newsletters
- 💬 Group Text Systems (e.g., GroupMe, WhatsApp)
- 📣 Yard Signs & Bulletin Boards
- 🌐 Neighborhood Website & Social Media Pages
- 📞 Phone Trees & Block Captains
- 🏠 Welcome Packets for New Residents



For templates to help you get started, go to [www.charleston-sc.gov/neighborhoodtemplates](http://www.charleston-sc.gov/neighborhoodtemplates)

# 04

## Fundraising & collecting contributions





## 4.1

# Fundraising for beginners

### Why Fundraise?

Fundraising allows your association to support community events, improvement projects, communication tools, and basic operations. Done well, it builds trust, transparency, and engagement. For templates to help you get started, go to [www.charleston-sc.gov/neighborhoodtemplates](http://www.charleston-sc.gov/neighborhoodtemplates)

### Step 1: Set clear fundraising goals

- Decide what you are raising money for (e.g., signage, newsletters, events, garden supplies).
- Set a fundraising target and timeline.
- Communicate your goals clearly to the community.

### Step 2: Chose fundraising methods that fit your neighborhood

- Host events: block parties, yard sales, raffles, talent shows.
- Sell merchandise: t-shirts, tote bags, stickers.
- Apply for grants: from the city or local nonprofits.
- Membership dues: consider optional or sliding scale contributions.
- Local business partnerships: ask for sponsorship or donations.

### Step 3: Best practices for collecting money

- Open a bank account in the association's name.
- Assign a treasurer to manage the funds and report regularly.
- Offer multiple payment options:
  - Cash (with receipts and secure lockbox)
  - Checks (payable to the association)
  - Digital apps (e.g., PayPal, Venmo, Cash App—create a business or association account)
- Track all income and expenses in a ledger or spreadsheet.
- Keep donation records and issue receipts.

### Step 4: Share and get feedback

- Share fundraising updates and financial reports at meetings.
- Thank donors publicly (unless anonymity is requested).
- Follow through on how funds will be used.

### Step 5: Keep it simple and consistent

- Start with small, manageable efforts.
- Repeat successful activities each year.
- Celebrate wins with the community!





## 4.2 Bookkeeping

Keeping clear and accurate financial records is essential for transparency, trust, and good management in your neighborhood association. This guide covers basic bookkeeping practices and includes a sample ledger.

### Why does bookkeeping matter?

- Tracks income and spending clearly.
- Protects your association from misuse of funds.
- Builds trust with members and donors.
- Helps with grant reporting and budgeting.
- Makes transitions between treasurers easier.

### What do you need to get started?

- A dedicated bank account in the association's name.
- A Treasurer or designated financial officer.
- A system to record all income and expenses (spreadsheet or notebook).
- Receipts and documentation for all transactions.
- A secure place to store records (physical folder or digital file).

### Tips for a strong application

- Record all money in and out, no matter how small.
- Keep receipts or proof for every transaction.
- Use consistent categories (e.g., dues, donations, supplies, events).
- Reconcile with your bank account regularly.
- Report regularly at meetings and to the board.

### Sample Ledger

Date	Description	Category	Income (\$)	Expense (\$)
03/01/2025	Neighborhood Meeting Dues	Dues	\$150	
03/05/2025	Flyer printing for events	Supplies		\$45
03/10/2025	Local business donation	Donation	\$100	

# 05

## Meetings

An effective meeting starts with a strong agenda and preparation from every board member. This strengthens governance and helps associations thrive. The City of Charleston asks that each neighborhood association in the Neighborhood Council hold at least one meeting per year.

---



## 5.1 Prepping for a meeting (checklist)

- ☐ **Secure a venue.** *Make sure that the space can accommodate the number of people anticipated. Neighborhood Services can offer venue suggestions.*
- ☐ **Review the previous minutes.** *Ensure you understand past discussions, actions taken, and follow-ups required, and bring any updates or progress on assigned tasks.*
- ☐ **Communicate agenda items in advance.** *Submit proposed items to the Chair or Secretary no later than 5 days before the meeting. Provide a short description, relevant documents (if any), and note whether the item is for discussion, vote, or information only.*
- ☐ **Gather background information.** *Read any circulated reports, community feedback, or policy changes relevant to agenda items. Be ready to contribute concise and constructive input.*
- ☐ **Clarify your role in the meeting.** *Know whether you're leading a discussion, presenting an update, or reporting on a subcommittee. Prepare clear talking points or visuals as needed.*
- ☐ **Connect with residents or stakeholders.** *Bring concerns, suggestions, or feedback you've received from neighbors, and be ready to represent diverse perspectives with respect and neutrality.*
- ☐ **Gather materials and refreshments.**

**For a more detailed printable list, scan this QR code:**

Or, go to [www.charleston-sc.gov/neighborhoodtemplates](http://www.charleston-sc.gov/neighborhoodtemplates)





## 5.2

# How to build a meeting agenda

The agenda should be clear and time-conscious and prioritized by importance. It's helpful to distribute the agenda ahead of the meeting, and have paper copies available at the meeting.

### Standard agenda template:

- **Call to Order & Welcome:** chair opens meeting and confirms quorum.
- **Approval of Agenda & Previous Meeting Minutes.**
- **Public Comments:** limit to 2–3 minutes per speaker, with a total time cap.
- **Old Business:** this can include status reports on prior initiatives, or updates on action items from last meeting.
- **New Business:** new proposals, community concerns, or committee suggestions.
- **Committee Reports:** brief updates from standing committees (e.g., Safety, Beautification, Events).
- **Announcements:** upcoming events, city planning notices, or neighborhood changes.
- **Adjournment:** set a time and date for the next meeting.

Tips: Use estimated time limits for each section to stay on track. Action items developed at the meeting should be captured and assigned an owner, and given an agreed upon estimated completion date.





## 5.3

### After the meeting

**Finalize and Distribute Minutes:** Include key decisions, motions passed, action items, and next meeting date.

Send within a week to board and association members.

**Follow Up:** Check in on progress toward assigned tasks, and prepare for follow-up discussion at the next meeting.



## 5.4

### General Tips

**Stay mission-focused:** Remind members of the association's purpose and values.

**Respect time:** Start and end on schedule.

**Be inclusive:** Encourage participation from quieter voices and new residents.

**Stay organized:** Use checklists, templates, and a shared calendar.

**Celebrate progress:** Recognize volunteers and completed projects





## 5.5 Roberts Rules of Order (Cheat Sheet)

### Basic Principles

- One thing at a time.
- Everyone has a right to speak (once per issue before repeats).
- Follow an agreed agenda.

### Typical Agenda Order

- Call to Order.
- Approval of Minutes.
- Officer & Committee Reports.
- Old Business.
- New Business.
- Announcements.
- Adjournment.

### How to Make a Motion

- Used to propose an action (ex: making a motion to approve budget).
- Member says: “I move that...”
- Another member says: “I second the motion.”
- Chair restates: “It is moved and seconded that...”
- Discussion occurs.
- Chair calls vote: “All in favor say ‘Aye’...”
- Chair announces result: “The motion passes/fails.”

## 5.5 Roberts Rules of Order (Cheat Sheet Continued)

### Tips for Chairs / Presidents

- Stay neutral in discussion.
- Restate motions clearly.
- Always call for a second.
- Alternate between speakers for and against a motion.
- Use a timer if needed.
- Ask for a vote only after discussion has ended.

### Quick Voting Guide

- Voice Vote: “Aye” or “No” (most common).
- Show of Hands (for smaller groups).
- Ballot Vote: For elections or sensitive issues.
- Majority: More than half of votes cast.
- 2/3 Vote: Needed to limit rights (e.g., end debate early).

**Questions?** Refer to the full Robert’s Rules of Order, Newly Revised or visit [www.robertsrules.org](http://www.robertsrules.org).



# Common motions & what they do

Motion	Purpose	Needs second?	Debatable?	Vote Required
Main Motion	Propose new action	Yes	Yes	Majority
Amend	Change wording of a motion	Yes	Yes	Majority
Table	Postpone Discussion	Yes	No	Majority
Previous Question	End discussion, move to vote	Yes	No	2/3
Point of Order	Call out a rule violation	No	No	Chair decides
Point of Information	Request clarification	No	No	No vote
Adjourn	End the meeting	Yes	No	Majority



# 06

## Problem solving at the neighborhood level

*"Our neighborhood formed the Gadsdenboro Coalition in 2022... We were able to coalesce around common issues (traffic, crosswalks, crime, etc) and present those to City personnel as a group vs individuals. The collective is more powerful than a single voice." --Vince DiMauro, neighborhood leader*

---





## 6.1

# Navigating government services: *Troubleshooting for Neighborhoods*

When confronted with a neighborhood issue, there are a few things to keep in mind while strategizing to solve it.

### **Is the issue or problem an emergency?**

If the answer is **yes**, call 911. Stay on the line even if you are put on hold.

If the answer is **no**, but the problem is related to public safety, call the police non-emergency line at 843-743-7200.

### **Who has jurisdiction over the property where the issue is?**

Whichever agency has jurisdiction of the property generally is in charge of fixing the issue. This can get complicated with utility easements, but it is a good place to start. Check the jurisdiction using [gis.charleston-sc.gov/interactive/mapnet](https://gis.charleston-sc.gov/interactive/mapnet) so you can figure out what organization to call first.

### **Is there a person onsite I can safely ask about the issue?**

If the issue is not an emergency and you feel safe, you can often save time by asking someone onsite. For example, if you are worried about what utility markings in the right of way mean, and there is a utility truck onsite, you may be able to find out from the people doing the work.

### **How big is the problem or issue?**

Some problems can be fixed by a call to a single agency. These are problems where the agency in question already has the funding and resources allocated to fix the issue. These are usually solvable with a work order with the correct agency. We recommend putting the work order in and following up with the agency at intervals until the problem is solved. *Budget and staffing can impact how fast agencies respond to work orders.*

Some problems require coordination between multiple departments or agencies. These can be a little more complicated to solve. If you think that your neighborhood's issue might fall into this category, email us at [neighborhoods@charleston-sc.gov](mailto:neighborhoods@charleston-sc.gov).

Some problems require changes to the City's budget, policies, or ordinances. This will generally require more effort from community members, elected officials, and staff to solve. You can email [neighborhoods@charleston-sc.gov](mailto:neighborhoods@charleston-sc.gov) for us to help you make a plan to organize around an issue in this category, or you can contact your elected officials.

**You can also find a brainstorming template for problem-solving at [charleston-sc.gov/neighborhoodtemplates](https://charleston-sc.gov/neighborhoodtemplates)**



## 6.2

### **Navigating government services: *who do I call about...***

In Charleston, road ownership determines who is responsible for maintaining the road, the right-of-way on either side of the road, the trees in the right-of-way, and the drainage beside or underneath the road.



If you're not sure what agency owns a particular road, plug the street name into:

[charleston-sc.gov/street-maintenance-districts](http://charleston-sc.gov/street-maintenance-districts)



Agency/ Office	Issues	Contact Information	Work Order Link
City of Charleston Citizen Services Desk	Issues on streets <b>owned by the City of Charleston</b> or properties (public or private) under the City's jurisdiction.	843-724-7311	<a href="http://www.charleston-sc.gov/1884/Citizen-Services-Desk">www.charleston-sc.gov/1884/Citizen-Services-Desk</a>
SCDOT	Issues on streets <b>owned by SCDOT</b>	855-Go-SCDOT (855-467-2368)	<a href="https://apps.scdot.org/mwro/">https://apps.scdot.org/mwro/</a>
Charleston County Public Works	Road/street repair on streets <b>owned by Charleston County</b>	(843) 202-7600	<a href="http://charlestoncounty.org/departments/public-works/work-order-request.php">charlestoncounty.org/departments/public-works/work-order-request.php</a>
Charleston County Pavement Management	Repaving on streets <b>owned by the City of Charleston or Charleston County</b>		<a href="https://www.charlestonctc.org/pavement.php">https://www.charlestonctc.org/pavement.php</a>





## 6.3 Citizen Services Desk

Need Help with a City Service?

The Citizen Services Desk is your one-stop resource for city-related questions, service requests, and reporting issues. We're here to help!

### Contact Us:

☎ Phone: (843) 724-7311

✉ Email: [citizenservices@charleston-sc.gov](mailto:citizenservices@charleston-sc.gov)

🕒 Hours: Monday – Friday, 8:30 a.m. to 5:00 p.m.

### Frequently Asked Questions (FAQs)

Report a problem, request a service, or ask a question about a non-emergency city service, including:

- Request a Garbage Can
- Report Missed Garbage or Trash Collection
- Get a Pothole Fixed
- Sidewalk Repair
- Ditch Cleaning
- Pay or Appeal a Parking Ticket
- Overgrown Yards or Vacant Lots
- Damaged or Missing Street Sign
- City Tree Issue or Pruning
- Streetlight





## 6.4 Contact your elected officials!

### Who are your elected officials?

If you are a resident of the City of Charleston, you are represented by a City Councilmember and by the Mayor. You can find out who your City Councilmember is by going to:

<https://charleston-sc.gov/180/Members-Districts>



## 6.5 Other numbers to know

Agency/Organization	Role	Contact
Dominion Energy (Customer Service)	Non-emergency customer service	800-251-7234
Dominion Energy (Downed/Sparking Lines)	Responds to downed/sparking lines	888-333-4464
Dominion Energy (Gas Leaks)	Responds to gas leaks	800-815-0083
Charleston Water System	Water and sewer service	843-727-6800