



How to Host an Effective Board Orientation

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Orienting a community association board is no different than onboarding a new team member – the first 90 days are critical to success. Regardless of your role on the community management team, if you take the time to get to know the board members, align expectations and educate the board about their role in the partnership, it will result in greater success for the community. Hosting a board orientation is a constructive way to start the partnership off so we've included a few recommendations for an effective board orientation.

1. Define the purpose.

The purpose of this orientation shouldn't be to review association documents, it's the time to orient the board to working successfully with their community management team. After the meeting, all attendees should walk away with a better understanding and comprehension of the different moving parts and how everyone can work together to achieve the goals of the community.

2. Know what to review.

At the orientation, you should share the history of the association and management company and introduce the team and service model. You should also review any technology tools that are available, communication services and expectations, board and meeting tools, and any other integrated services or ways to add value to the community

3. Have the right people there.

It is essential the board understand that community management is a team sport and that they are standing on the shoulders of team members who are all supporting the success of the community. Introduce the people serving them, the branch president, vice president, community manager, and directors, explain each role and relationship clearly and make sure people know there's an entire team available to help and who to contact.

4. Be prepared to answer questions.

Attendees are typically curious about communication expectations and ask “how” questions – like how something works, how to know something has happened, etc. Be prepared to address different scenarios and how the team will deal with those types of events.

5. Don't make it another board meeting.

Make sure the board orientation doesn't turn into just another board meeting- this meeting should be about how the board can collaborate with the team for an ideal partnership to serve the needs of the association. Having a timed agenda (around 90 minutes) and serving food is a great way to ensure the purpose of the meeting stays on time and on task. And anytime you are working with your clients, it's important to show them that you value their time and make them feel welcome and at ease.

About the Author

Ann Williams, CMCA®, serves as the president of Colorado Association Services, an Association company. She oversees operations, business development and the association management teams within the three branch locations in Colorado Springs, Fort Collins, and Lakewood.

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