



The Best Tools for Keeping Your Board Focused and Aligned



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With all the responsibilities that board members are tasked with handling for their communities, working efficiently and effectively are top priorities. One of the most important ways your board can achieve more in less time is to use the best tools available for keeping every board member engaged, informed and on the same page throughout every step it takes to run a community successfully.

We asked a couple of our community management experts, Laszlo Antal, Business Development Account Manager at **Associa BC**

(<https://www.associaonline.com/locations/associa-british-columbia>), and Lisa Evans, Community Association Manager at **Associa Chicagoland**

(<https://www.associaonline.com/locations/associa-chicagoland>), what tools their boards use most and how they're helpful. And while technology solutions are included, they aren't the only options for getting community business done better and faster. Read on for the tools they recommend most.

1. Established Operating Procedures

“It might sound simple, but I strongly recommend establishing smooth workflow procedures that will help the board work efficiently on routine items. Operating procedures can streamline and simplify the board’s day-to-day activities, whether they include setting guidelines on communication, HOA fee collection, bylaw enforcement or any other HOA matter. A formal operating procedures document will provide the needed structure for HOA boards to govern effectively.”

2. Board’s Report to Homeowners

“The elected board is acting on behalf of all homeowners. As the board is accountable for their decisions, it is prudent and expected that at every annual general meeting the board provides a report to the owners, highlighting major events, decisions and accomplishments. This keeps the community well-informed about where they’re getting value for their assessment dollars while inspiring confidence in the board.”

3. Management’s Report to the Board

“The community manager should provide the management report, including the agenda and supporting material, at least five to seven days prior to a meeting. Board members should utilize the lead time to carefully review and submit any questions to the manager about the material ahead of time if possible. This allows the manager to research, contact vendors, or do any other necessary fact-finding so that questions can be answered in advance. Waiting until the meeting to pose questions can often delay decision making because answers may not be immediately available at the meeting.”

4. Annual Maintenance Plan (<https://hub.associaonline.com/ebooks/the-5-essential-steps-to-developing-a-community-maintenance-plan-that-works>)

“At every annual general meeting, the homeowners adopt a new budget for the following fiscal year that includes upcoming maintenance items. At the very first board meeting of the new fiscal year, the board should draft a maintenance calendar by turning each maintenance-related budget line item into an action item with a due date. Knowing ahead of time what services will be performed each month will help the board stay on track with budgeting and maintenance and allow them to communicate with owners productively. When it comes to maintenance don’t be reactive; be proactive!”

5. The Annual Business Calendar

“The calendar keeps the board on track in scheduling routine maintenance items, budget planning, and noting when service contracts expire. The board can easily anticipate renewals or

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decide if they need to go through the bidding process. This not only helps them stay organized, they can ensure the community gets the best value for any work performed by allowing for enough time to evaluate other vendors.”

6. Board Meeting Schedule

“Board members should schedule all of the **board meetings**

(<https://hub.associaonline.com/ebooks/7-clever-ideas-for-annual-meeting-participation>)

for the entire calendar year on the annual business calendar. This allows the community manager to secure the venue, inform all homeowners of the dates for the year, and keep all board members aware of the dates when planning other commitments throughout the months. This also facilitates budget planning due to critical deadline dates for publishing the budget for the owners to see prior to adoption.”

7. TownSq

“Right now, I use our follow up action list to help keep the board and I all on the same page. I provide updates and I also put board tasks on the list for them to view as well. We use email a lot to keep everyone in the loop and to help track who is doing what task each month. Then when I do my management reports I can communicate what happened during the month and also bring up new action items that we need to take care of.

However, I am still working on my boards to use **TownSq** (<https://www.townsq.io/>) because it will allow us to establish and accomplish action items in real time, and the new groups feature in the forum will allow us to communicate all in one place, cutting down on email. I can see us using it a lot in the future.”

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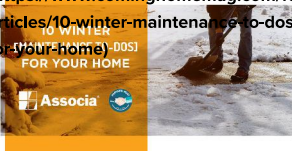
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(<https://www.cominghomemag.com/features/articles/10-winter-maintenance-to-dos-for-your-home>)
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Partner Post: 10 Winter
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RESOLUTIONS TO MAKE
IN YOUR COMMUNITY



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ASSOCIA NETWORK

Associa Advantage
(<http://www.associaadvantage.com/>)

Associa OnCall
(<https://www.associaonline.com/maintenance-services>)

Associations Insurance Agency, Inc. (AIAI)
(<http://www.associationsinsuranceagency.com/>)

Community Archives
(<http://www.communityarchives.com/>)

First National Bank of Kemp
(<https://www.fnbkemp.com/>)

HOA Collection Services (HCS)
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LHR Construction & Restoration
(<http://www.lincoln-hancock.com/>)

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