



I'M ON THE BOARD. NOW WHAT?

The Complete HOA Board Member Starter Guide



THANK YOU FOR **Volunteering!**

You take pride in your home and in being part of a great community. When you saw an opportunity to make things even better, you decided to step up to the challenge and take on a more active role with your homeowners' association (HOA). But, as the newest board member, you're probably asking yourself: "Now what?"

Don't worry. We've seen it all, and we know all about the stress and responsibilities of being a brand-new board member. That's why we've put together a comprehensive resource guide to help.

In this ebook, we're giving you the collective knowledge of our 40+ years of experience working alongside countless board members to improve their communities. Keep reading to learn the fundamental roles and responsibilities of an HOA board, how to find success in your new position, and the next steps you need to take as the newest board member.



KNOW YOUR ROLE: PRESIDENT

Leads the Board & Handles Procedural Duties

Successful presidents familiarize themselves with the community's CC&Rs and governing documents. This office should be the authority on the rules and laws that govern the board and should take the lead on calling and running all board meetings, which includes managing the agenda. The president should also call for any votes and announce the results.

Primary Duties:

- Schedules and runs board meetings
- Main point of contact for management partners
- Signs association documents



KNOW YOUR ROLE: VICE PRESIDENT

Shares Main Duties With President

The vice president should support the president and will need to be able to act in their place if the need arises. They should familiarize themselves with the same community documents as the president and be able to perform the same duties. A good vice president will help ensure meetings run smoothly and that order is always maintained. Typically, they will also chair larger committees such as architectural reviews.

Primary Duties:

- Acts for president when they are absent
- Leads important committees
- Helps run meetings



KNOW YOUR ROLE: TREASURER

Acts as Financial Manager for the Association

The treasurer is responsible for the association funds and maintaining all of the board's financial records. From billing and collections to disbursement of funds, the treasurer will oversee all things financial. They can do these on their own, but more commonly, they can also outsource them to an accounting partner. Either way, they should ensure everything is done according to the association bylaws, and should lead the efforts on the boards annual budget plans.

Primary Duties:

- Billings and collections
- Annual budgets
- Financial reports



KNOW YOUR ROLE: SECRETARY

Manages Board Records

The secretary is responsible for keeping the official records of the board. These responsibilities include taking meeting notes and making sure notice of all meetings is given to homeowners. They should ensure all board documents are well maintained and accessible to the appropriate parties. They should also ensure that the legal requirements of the board are being met with annual filings and any other required paperwork.

Primary Duties:

- Meeting notes
- Office HOA records
- Filing annual corporate reports



4 STEPS TO BECOMING A **Successful Board Member**

Finding lasting success as a board member requires more than merely checking off the boxes. There are certain behaviors and attitudes a board member must have to make a positive impact on their board and community.

1. Always put your community first.

Every board member has a fiduciary duty, which is an obligation to act in the best interest of the entire association. No decision should ever be made that only benefits themselves or a select group of people. Instead, fiduciary duty mandates decisions are made very carefully as you consider the needs of the individuals and the community as a whole.

2. Be prepared.

Boards don't meet that often, so when they do, make sure you come prepared to make the most of the time together. Being prepared goes beyond meetings - take time to learn about your community and the governing documents. Homeowners may ask you questions from time to time, and it is helpful to provide them with reliable answers to help build trust and respect.

3. Learn to delegate.

From time to time your responsibilities will need to be delegated. Delegating things like maintenance or accounting can help a community thrive. Work with your board to determine what items that should or should not be delegated, then work with partners you can trust to get the job done right.

4. Stay positive.

Your time of service on a board can have its ups and downs, but through it all, it's crucial you stay positive. Support your fellow board members and when the board makes decisions stand firmly behind them. Your friends and neighbors may look to you for guidance on issues, and it's essential to encourage positivity.



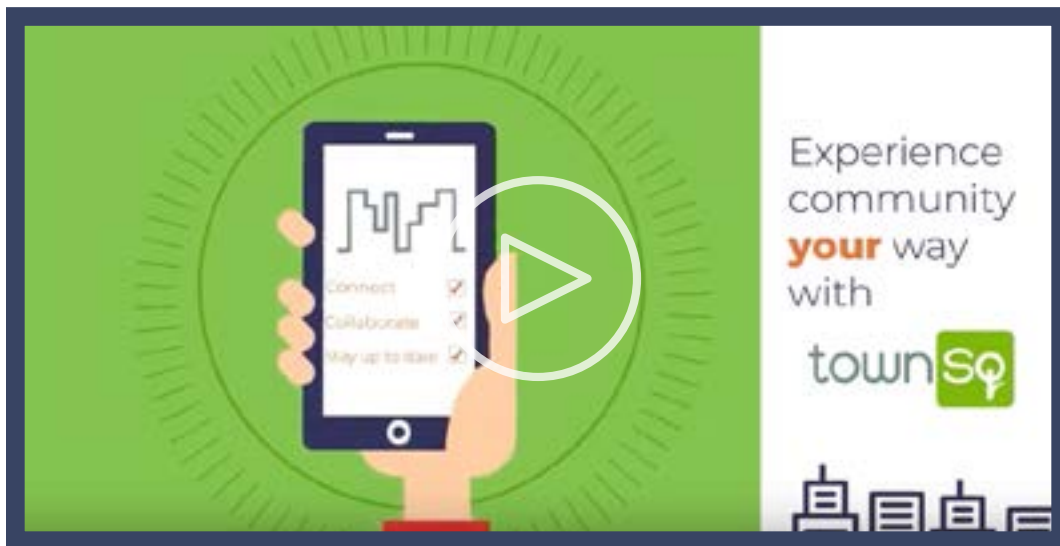
TOWNSQ CAN HELP YOUR COMMUNITY, GET TOGETHER & STAY CONNECTED!

Do the responsibilities of serving on your board have you feeling overwhelmed? TownSq can help! This all-in-one community app connects homeowners, management companies, and board members while effortlessly streamlining many of your board duties. With TownSq you'll always be connected to your community and have an easy way to communicate upcoming meetings, rule changes, and more!

TownSq allows you to experience community your way – any time and from any device with:

- Online payments
- Account management
- Valet and vehicle management
- Service requests
- Common area and amenity booking
- And more!

WATCH THIS VIDEO TO LEARN MORE!



townSq
experience
community your way



iOS



Web



Android

www.townsq.io

*TownSq may not be available in all areas. Check with your community manager for more details.

HOW TO KEEP YOUR COOL

When Problems Arise

Even when you and the board are doing your best, conflict is inevitable. How you choose to handle that conflict will ultimately determine if your community moves forward or gets stuck in the mud. Below are three things to help resolve conflict and manage expectations.

Focus on communication and customer service.

Be sure to communicate clearly and frequently – never withholding any details that aren't private. Good communication is also about listening. Try to listen to concerns actively, and just like any good business, focus on customer service – always being open and empathetic to homeowners. When board members are committed to providing positive experiences for everyone involved, problems will arise less often.

Be prepared for different opinions.

Even when you're doing your best to communicate effectively, differences of opinion will still occur from time to time. These differences of opinion can present themselves in the form of angry or abrasive homeowners, but it's essential to keep things cool and professional. Some helpful things to consider when being presented with different opinions include:

- The person may only have one side of the story or limited information.
- The person may have all of the information and simply have a different viewpoint.
- Varying points of view and diversity of opinion are a good thing.
- Always demonstrate respect to those who differ.
- Set clear boundaries.

Run an effective open forum.

Even if your association doesn't require open forums, we suggest you have them. Open forums are a great way to keep homeowners informed and get ahead of any problem before a potential conflict arises. Here are 6 tips to run an effective meeting:

1. Set a reasonable time limit.
2. Use a sign-in sheet.
3. Communicate rules and expectations at the beginning.
4. Always maintain order.
5. Be consistent in tone and enforcement.
6. Frequently thank your owners for participating.



HOW TO SELECT THE **Best Community Partners**

Board members are never alone in their efforts to improve and maintain their community. Association partners will work closely with your board to help ensure things are handled in a timely and professional manner. Whether these partners have already been selected, or you're helping choose them for the first time, remember always to use your business judgment. Be sure to vet each partner carefully and ask for references and referrals when possible. And don't forget to make sure they have the experience and resources to back up their promises.

Community partners that boards will need to select may include:

- Attorney
- Audit Accountant
- Community Manager
- Engineer
- Financial Accountant
- Insurance Provider
- Landscaper
- Maintenance Team



MAKING [Board Success] HAPPEN.

Developed by industry professionals. Designed for association board members.

For nearly 40 years, Associa has been the partner of choice for some of the most complex, innovative and amenity-rich properties in the world. Our best-in-class technology, products and services are designed to add value to your community. And, you'll find that nobody has the expertise that we do when it comes to helping you achieve your community's goals. Because of our commitment to community, we've become an industry leader positioned to provide actionable insights that deliver results for our client communities.

What really differentiates us, though, is our people.

With nearly 200 employees holding their PCAM® – the highest professional recognition available to community association managers – you can trust that your Associa team has the knowledge and resources to help your community plan, manage, maintain and grow. From our community managers and service partners to our financial professionals, executives and many more, we are committed to helping you achieve your community's vision. [Click here to request a proposal!](#)

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