



**KEYSTONE**



**A PRIMER FOR NEW  
HOA BOARD MEMBERS**



Congratulations! You've taken on an active role in your community by volunteering to be on your HOA Board. Sitting on the board of your HOA is a rewarding way to get involved in your community, get to know your neighbors, and personally ensure that your property values are preserved and protected—for the immediate future and in the long run. As a new member of your community's HOA board, you may be uncertain about your new role, who handles what, and what authority the Board has over the community. We've put together a primer for new HOA Board members that provides essential information to help you be successful in your new role.

## THE ROLE OF THE HOA BOARD

As a Board member, it's important to understand the main role of the Board in the community, as well as what is expected of the Board. The HOA Board has two main duties:

### **Acts a Fiduciary for the Non-profit HOA Corporation**

This means that they're entrusted with making the decisions that affect the values of the properties in the community. One of the board's primary responsibilities is to protect, preserve, and enhance the value of the physical property governed by the community association.

### **Facilitates the Enjoyment of the Community**

This involves setting the rules and regulations for residential conduct, including usage of common spaces, landscaping standards, and anything else that affects the overall residential environment of a community.



## WHAT IS EXPECTED OF THE HOA BOARD?

Members of the Board act in the best interest of the HOA, no matter their private opinion or personal bias. In addition, board members are expected to:

- Act in a fair and consistent manner
- Refrain from voting on issues or making decisions that present a conflict of interest
- Maintain confidentiality
- Treat homeowners and other board members with respect during discussions and throughout any dispute resolution

## HOW DO MANAGEMENT COMPANIES HELP THE BOARD?

The management company is the Board's closest and most trusted business relationship. They always have the best interest of the HOA top of mind and are always working to protect and increase property values in the community. They do this by implementing HOA management practices such as:

- Making sure the community common area looks great
- Making sure the corporation's liability exposure is low
- Ensuring that the community manager working with the board is the right fit to provide outstanding service to the community
- Helping to build a sense of community
- Providing ongoing training and support for their community manager



## WHAT MAKES A GREAT HOA BOARD MEMBER?

In our experience providing HOA management resources for associations, we have discovered there are certain traits that make for excellent board members. Here's what to strive for as you serve on your community's HOA board. Great HOA board members...

### **Enjoy Volunteering**

As a volunteer, they have the time, patience and enthusiasm to dedicate themselves to community issues.

### **Are Civic-minded**

The best board members want to get to know their neighbors, enjoy building community, and take pride in the place they live. They put their community's best interests first and seek to build long-term value for their community, both socially and financially.

### **Are Positive and Optimistic**

Managing a community comes with many challenges. Great HOA board members bring positive expectations to their role and refuse to get discouraged, even when faced with tough decisions.

### **Exercise Fairness**

Board members are there to serve their communities, not their own personal interests. Great board members understand this and demonstrate respect to all community members, regardless of how they feel about an issue personally. Their friends receive no special benefits; they know that HOA rules must be evenly applied to all community members.

### **Know That the Rules Apply to Them, Too**

A resident that serves on an HOA board isn't exempt from any community regulations. Good board members understand this and never try to use their position for personal gain.



### **Take Their Role Seriously**

Board members work in tandem with a community's HOA management company to preserve and protect the value of the properties in their community. They understand their responsibility as a fiduciary of a large non-profit corporation (the homeowners association) that controls millions of dollars in assets.

### **Have a Mind for Business**

In addition to the social aspects of running a community smoothly, great board members are able to see the big picture and make smart long-term business decisions that will ultimately increase property values for all residents. They listen to the expert advice provided by their HOA management company and don't rush into any hasty decisions.

### **Understand That Their Authority Comes as a Board, Not a Board Member**

Board members know they possess no individual authority. Rather, in their role as a unified board, they make group decisions that positively impact their communities. Therefore, they quickly support group decisions, even if they are counter to their own personal opinion.

### **Seek Education**

Changing laws, liability issues, and responding to community needs in real-time require detailed knowledge and deep understanding of the concerns that can impact a community. Great board members take advantage of the training and HOA management resources offered by their management company and educational opportunities at trade organizations.



## HOW TO RUN A SUCCESSFUL BOARD MEETING

HOA Board meetings are the backbone of a HOA. They are the mechanism by which the Board discusses important topics, collects input from homeowners and makes decisions that will ultimately affect everyone who lives in the community. At their best, they are important tools to help the Association operate effectively, ensuring that everyone is on the same page and that disputes are resolved quickly and fairly. At worst, they are labored sessions where much is discussed and not much is resolved. Here are our fail-proof tips to help your Board conduct meetings that are productive and successful.

### **Tip #1: Everybody involved must come prepared.**

Each member is expected to review the meeting agenda and related materials before the meeting. When you come prepared, you are able to spend your time during the meeting focusing on agenda items, not minutiae. If there are any questions about any materials in the packet, reach out to your HOA management company to clear up any confusion prior to the meeting.

### **Tip #2: Remember that these are meetings of the Board of Directors, not the membership.**

Your HOA Board meeting is a business meeting of the Homeowners Association corporation, not a round-table with the membership. It is a time for clear discussion and focused decision-making. Resist the urge to veer off-topic and decide on issues as they arise. Remember that there is a big difference between a “response” and a “reaction.” Instead, ask your property manager to schedule a discussion for a future Board meeting.

### **Tip #3: Assign a point person to run the Board meeting. This is usually your HOA President or property manager.**

A single voice who is tasked with running the meeting keeps everyone focused on the task at hand. Your meeting leader should be someone with a clear focus and strong presence who has no problem jumping in with time limit reminders and can reel everyone back in to keep the meeting on track. By limiting agenda items and adhering to a strict time structure, the meeting leader helps to ensure that the meetings are effective and stay within schedule.

### **Tip #4: Produce good documentation after the meeting.**

All the time spent in a productive Board meeting is wasted if no one knows what next steps to take when leaving. Your HOA property management company will record your meeting’s minutes then create a punch-list of action items. These concrete actions will provide a clear outline of who is responsible for what and will help you evaluate progress and accomplishments throughout the year.





## HOW TO CREATE HARMONY ON YOUR BOARD

Part of the fun and reward of serving on the board of your homeowners association is getting the opportunity to listen to the many perspectives of other board members before reaching a decision that will best serve your community. In order for your community association management board to function smoothly, it's necessary to create and maintain an environment where each board member feels valued and respected. Though differences of opinion are bound to arise when groups of people are tasked with making a single decision, here's how to help your HOA board become more harmonious and maintain a high standard of service to your community.

### **Make Sure Everyone Feels Heard**

Remain open-minded to those with communication styles that differ from your own. Remember that each board member wants to do what's best for the community. Give each individual ample time to articulate their point.

### **Let Your Governing Documents Be Your Guide**

Your community's governing documents are an impartial resource designed to provide clarity and guidance when making decisions. By relying on your governing documents, you reduce some of the emotional charge that can accompany big decisions.

### **Practice Transparency and Respect at All Times**

HOA boards who demonstrate respect at all times function much more harmoniously than those who get sidetracked by personal differences. Refrain from any side discussions about issues facing the board. Never allow your personal feelings about any board member or their opinion to influence your decision-making.



### **Ask Your Management Company for Advice**

The professionals at your HOA management company are skilled people managers. In providing guidance and support to homeowners and HOA boards, management companies have expertise balancing various personalities regarding issues large and small. Your property management company can help your HOA board mitigate problems or avoid them entirely by:

- Assigning a manager with the right attitude for the community
- Ensuring ongoing clear communication between all board members
- Mediating conflicts between individuals
- Finding ways to bridge personality divides in a professional and productive way

Serving on the board of your homeowners association brings both rewards and challenges. As you discover the unique assets each board member brings to the board, remember that all types have something to contribute to the benefit of the association. By learning to work cohesively together, you create harmony and build a community that sets the tone for the entire association.