



## **Six Essential Tips for New Board Members**

Congratulations are in order – you’ve just been elected to the board. So now the big question: *What’s next?*

The great thing about associations that are helmed by owners is that they have a vested interest in doing right by their community, but that also comes with challenges... many board members find themselves in this kind of position for the first time, so there’s a little bit of a learning curve.

Fortunately, Kinetic Property Management is here to help. Follow these board member basics and you’ll soon be governing like a pro.

### **1. Know your role.**

Let’s start with the essentials. If you understand your role completely, you’ll be much more effective and efficient. Basically, your job is to protect the best interests of homeowners, help preserve the value of the homes in your community, and improve the quality of life of residents. As for specific roles within the board, let’s take a closer look.

The board is led and managed by the President. This individual should have a working knowledge of all governing documents (refer to #2 below), as well as the ability to run the business of the association while staying true to the ideals of governing democratically.

Directly underneath the President is the Vice President. This person shares many of the responsibilities as the President and serves in the leadership role when the

President is absent. The Vice President will help maintain order, ensure the association's business is running efficiently and effectively and acts as a knowledge-leader when it comes to the association's rules.

Next, there's the Secretary, who is charged with maintaining records, acting as an association historian and protecting the association from liability. The ideal Secretary is an individual who is organized, detail-oriented and committed to the long-term future of the association.

Finally, there's the Treasurer, whose focus is the association's financial stability. Specifically, the Treasurer's purview includes acting as the board's financial voice and working with auditors, CPAs, brokers, bankers and agents. Budget preparation and account maintenance are part of the job, too.

No matter what your specific role, there are some general guidelines to follow that define good board member. Remember, you're part of a team, and no one board member has greater authority than another. Keep your policies, procedures, rules and regulations sacred and follow them at all times. Base your decisions on facts, not emotion or assumptions. And always keep yourself – and your fellow board members – accountable.

## **2. Do some homework.**

Your next order of business is to make sure you're familiar with the governing documents for your association. The first of these is the Declaration or Master Deed, which includes the [Covenants, Conditions & Restrictions \(or CC&R's\)](#) and sets forth the responsibilities of the association. It also outlines the rights of owners and their obligations.

Next, you'll want to be familiar with the Articles of Incorporation, which act as the legal document that creates the corporation as an entity. It also defines the number

of directors, the functions of the board and more. Be sure to take a look at your bylaws as well – these are provisions that set forth rules for how the association operates... things like meetings, election procedures and board duties.

Finally, familiarize yourself with all of your association's rules and regulations – the set of policies adopted by the board. It's important to note that these rules and regulations should always be in accordance with state and local laws.

### **3. Make meetings count.**

When the board meets, it's time to get things done. But a poorly run meeting can actually create more challenges than it solves. There's an art and science to a [productive meeting](#), but it boils down to a few simple processes.

First, make sure you've designated a meeting chair. This person drives the meeting and helps everyone stick to the agenda. It's their job to stop irrelevant discussions before they derail the entire conversation. Everyone should assume responsibility for maintaining efficiency – that means keeping comments succinct and being prepared by reading the agenda beforehand. You can also keep things under control by restricting (or at least minimizing) the introduction of items not on the agenda.

Also, remember proper parliamentary procedures. For instance, actions are determined by a meeting attendee making a "motion." The chair should repeat the motion to make sure all attendees can hear it. Make sure you follow the voting procedures as they are outlined in your governing documents. Additionally, you should keep minutes of every meeting. For a complete list of what constitutes good minutes (and as a great resource for meeting procedures in general), pick up a copy of *Robert's Rules of Order*.

At the conclusion of the meeting, the chairperson should sum up what was discussed so everyone's clear on all decisions made and what the next steps are.

Finally, don't tolerate disruptive behavior of any kind, and remember that you have the authority to expel any person exhibiting unruly behavior from the meeting. And one note on transparency: refrain from relying too heavily on "executive" or "closed" meetings... sometimes they're necessary, but they should be the exception, not the rule.

#### **4. Team up with a good property management company.**

If you're fortunate enough to work with a good property management company, they can help you acclimate to your new role. After that, it's important that you work effectively with the management company so you can maximize the resources it offers. As part of their service to you, the community association management company provides customer service and support, enforces your association's policies and ensures appropriate communication is delivered to all homeowners and residents. A great company also assists with financial management and budgeting, maintaining records, managing vendors and connecting you to additional expertise when you need it. Of course, specifics will vary depending on your agreement with the firm.

#### **5. Be ready to change your community through volunteerism and committees.**

Part of your job as a board member is to promote a culture of volunteerism within your community. This goes a long way toward fulfilling your responsibility of strengthening the ties that bring neighbors together. Look for great volunteers. Reward them. Cultivate them. And help them grow into community leaders.

A great way to do this is through committees, of which there are two main types: standing committees, which continue in perpetuity, and special committees, which are temporary and cease to exist once they've fulfilled their mission. When it comes to creating committees, just follow the guidelines and rules set forth in your governing documents. Remember that committees report to the board and provide their findings and recommendations in writing.

There's much more to know about committee formation and management, so look to your governing documents or talk to your community association management company for help.

## **6. Character matters, too.**

Board membership has its challenges, but if you stick to a few basic principles you'll foster a culture of openness and shared success in your community. It's important that you never allow your integrity to be compromised. Stay calm in the face of conflict and challenge. Put the community's needs above your own. Be thoughtful and deliberate in your decision-making. Avoid "back-room" deals and maintain a culture of transparency. And most of all, listen and be willing to work with others.

While this list of tips is by no means exhaustive, consider it a way to hit the ground running. As you grow into your role, talk to more experienced board members – they can be a wealth of essential information. And a good community association management company is a great resource for helping you make the most of your role, so you can do the best for your community.

For more information, [contact Kinetic Property Management](#) for all your HOA, Association, or Property Management service needs.