

## **Make Sure You Have These Five People at Your Board Meetings**

It takes a lot to build a great community: you need committed residents, a dedicated board of directors and a clear understanding of everybody's roles and responsibilities.

At its best, your community association board will offer a complete vision for the community. But its responsibilities go far beyond that. In a practical, hands-on sense, the board is tasked with protecting and preserving the association's assets, minimizing the financial risks to the association, maintaining the community's property values and enhancing the living experience for all residents. These mandates include everything from establishing policy and creating a budget to ensuring preventative maintenance, and more.

The most important assets your board has to meet these goals are the people who are part of it. Each member of the board needs to clearly understand his or her roles and responsibilities to both the board and the community at large. This understanding will make the board more effective and cohesive, leading to a more enjoyable community with greater resident satisfaction. A solid property management company will provide board education and training resources, helping you cultivate the qualities of great board members.

Board structures can vary, but there are certain officer roles that are both universal and necessary. Having the wrong people leading your board can result in a stagnant board that can't accomplish its goals, creating community division and strife along the way. To build a solid foundation for your community association board, no matter where you live, make sure that the best possible people fill these

roles at your meetings:

## **President**

The president's responsibilities include important procedural roles as well as essential leadership functions. For instance, the president may appoint committees, if dictated by the bylaws, and operates as an authority on the rules and documents governing the association. During meetings, the president maintains order, proposes questions, calls votes, announces outcomes and recognizes those who are about to speak on the floor. The president also calls the meeting to order, announces the agenda and ensures that everyone adheres to it. As you can see, this takes a unique personality: someone who is conversant in the dynamics of effective meetings as well as knowledgeable about many of the specifics of your community.

The essential part of getting the right people on your board is to utilize the skills of each person for each position. Look at their skills, history and background. People with experience running businesses of any size can also come to the board with skills that will make it operate more smoothly.

If the president handles the association as a business rather than a social circle, focusing on community goals, more will be accomplished. They understand the need to accomplish tasks, but also be fair and amicable in their dealings. People who see the board and association as their social circle tend to run long meetings that are not efficient and don't accomplish much. It's important to keep in mind that many large associations are multi-million-dollar businesses, not social clubs.

## **Vice President**

The vice president shares many of the president's responsibilities and serves in a leadership capacity when the president is absent. This individual is tasked with helping to maintain order during parliamentary procedures, keeping the flow of business moving efficiently and acting as a knowledgeable source when it comes to the rules of the association. Many smaller associations choose not to have a vice president as part of the structure; if that's the case, make sure that everyone on the board understands who will step up if the president is unavailable for a meeting.

## **Secretary**

Think of this person as the association historian. The secretary's role is to record all of the actions of the board so they can be referenced later. This ensures clarity and provides the board with a reference point for when and how decisions were made. Imagine how often you've had a conversation with another party, only to find there were two different interpretations of the outcome after the fact. Now multiply that by every member of your association, and you understand how important good records are. The secretary's functions eliminate those "Oh, I thought you meant..." scenarios by keeping accurate minutes during meetings and acting as the custodian of all records. The secretary will also sign the minutes of all meetings and other important community documents.

How those minutes are taken can vary from board to board. Sometimes, an onsite staff member will take the minutes and the secretary approves and signs. Other boards prefer that the secretary takes the minutes during the meeting. Regardless of who is doing the job, minutes should be simple, clear and accurate. The meeting minutes should be a summary of the motions made and actions taken, not a word-for-word transcript of the meeting.

## **Treasurer**

The effectiveness of your board is dictated largely by your budget. This makes the treasurer's role essential. He or she will be the keeper of financial records, ensuring they are both accurate and thorough. The treasurer will apprise the board of the association's financial health through regular reports of income and expenses and will also produce an annual financial report to all members. Look to the treasurer to submit financial records in the case of an audit and to authorize any disbursement of funds. The treasurer is also the primary check signer for community payables.

What skills will an effective treasurer possess? Someone who understands accrual accounting will be very helpful. They will appreciate the level of detail that our financial reports provide and can explain them to the rest of the board or to any residents who have questions.

## **Community Association Manager**

As an outside party bound to your association by contract, it's important that your community association manager comes from a reputable property management company. The right management company will provide your manager with the additional resources necessary to do an excellent job, including the knowledge and expertise to deliver the best service to your community and board. Though the specifics of his or her duties vary by contract, all managers typically execute the policies dictated by the board and administer all of the services, operations and programs of the association. Your manager should also be an important source of information and insight. In fact, many boards become more effective through training provided by an experienced property management company.

When it comes to board meetings, your manager should be able to provide the board with clear recommendations on actions to take. Your manager will be able to talk about your budget and reserve study, the line items affected by a proposed

action and other operational matters such as vendor choices. Although the manager's role can vary based on the board's desires, having the depth of resources provided by a large management company will help any manager succeed at carrying out the board's agenda.

In the end, understanding the basics of each role will help make sure your board's essential functions are covered as well. As with any human endeavor, the individuals elected to their roles will bring strengths and talents all their own. It's important to allow those strengths to come to the forefront – your board will benefit from it.

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