

# 7 Things Every First-Time Board Member Should Do

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Becoming a member of a homeowners' association (HOA) **board of directors** is an exciting and rewarding opportunity. You'll play an integral role in maintaining and enhancing the neighborhood, financial planning,

and regulation enforcement. You'll also collaborate with other board members to ensure residents are represented and informed.

While new board members are often eager to start, it's vital to understand your role and how you can make meaningful contributions during your term. Here are a few things every first-time HOA board member should know and do to successfully prepare for the role.

# 1. Know the Duties of Every Officer Position

Every HOA board member has designated responsibilities that keep the association running smoothly. Of course, you should be familiar with your own duties and how they can impact the community. However, it's equally important to know the **expectations of the other board members**, including:

- **President** - The board leader who runs meetings, oversees association procedures, provides overall guidance, and serves as the spokesperson.
- **Vice President** - Supports the president, leads committees, and fills in whenever the president is unavailable.
- **Secretary** - Responsible for maintaining, overseeing, and properly storing and distributing association records and documents, like meeting minutes.
- **Treasurer** - Supervises all HOA financial matters, including account management, budget preparation, billing, and payments.

Recognizing the roles of fellow board members allows you to better support them and hold them accountable while also gaining a clear understanding of how the association functions.

## 2. Review the Governing Documents

Essentially the constitution, law, and regulations that explain how a community is governed, your community's **governing documents** will answer many of your questions as a new board member. Whether you want to know more about the specifics of your position, how the association operates, or details on community rules, you'll find them in these documents. As you start your role, be sure to review the association's:

- Declaration or Master Deed
- Articles of Incorporation
- Bylaws, policies, and **rules and regulations**
- Code of Professional Ethics
- Other procedural guidelines

## 3. Get Familiar with Financials

No matter your position on the board, you should strive to have a keen grasp of the HOA's finances. The board is responsible for maintaining the association's financial health, keeping the **budget** balanced and

spending on track. When you understand accounting and cash flow details, you're better equipped to make informed decisions, set realistic goals for the community, and prevent auditing issues.

For added guidance, work with the HOA treasurer or a third-party **certified public accountant** (CPA) to get up to speed.

## 4. Prioritize Your Goals

Enthusiastic first-time board members often bring a wealth of ideas and fresh perspectives. However, you must **prioritize goals** and balance new initiatives with the community's needs. While it's tempting to dive headfirst into your role by tackling every project at once, it's easy to become overwhelmed if you take on too much too fast.

Instead, work with the other officers to determine priorities based on which goals are most realistic and within the budget. Then, you can move forward with a game plan.

## 5. Remember That Communication Is Key

It's a good idea to approach your job knowing that **communication is a fundamental part of your duties**. How you communicate with residents, vendors, partners, and board members is crucial to the association's success. It's important to be open, transparent, and available to build positive and trusting relationships.

You should thoroughly review your community's processes, policies, and procedures, so you're prepared to communicate effectively with key stakeholders. In addition, remember to be receptive to residents'

opinions and feedback. This can help you **avoid conflicts** and establish a rapport with the people you represent.

## 6. Make the Most of Board Meetings

Necessary for the overall development and advancement of a community, **board meetings** are where most business is conducted. During these meetings, board members assess operations, settle disputes, and plan for the future. To optimize efficiency, always try to make the best use of meeting times. You want these gatherings to be productive and relevant to the community issues at hand. Some ways to do this include:

- Designate a meeting chairperson to ensure you stay on track
- Read the agenda and come to meetings prepared
- Be polite and respectful of other board members
- Keep comments short and stick to the agenda items
- Understand that time is limited; avoid going off on tangents
- Follow proper procedures and rules of conduct for running a meeting
- Keep detailed **minutes** of every meeting for review

## 7. Take Advantage of Available Resources

As you embark on your journey as an officer, know that you're not alone, and you aren't expected to be an expert on day one. Take your time and explore the **variety of resources** available to help you learn and adjust. Consider seeking guidance and support from:

- Fellow board members
- Past board members
- Experienced property managers
- HOA insurance agents
- Other third-party experts
- Influential committee chairs and residents

## Stepping Into Your HOA Leadership Role

Serving your community on the board of directors is a fulfilling job that can make lasting improvements in the neighborhood. Being prepared to take on these new responsibilities is key to making the most impact during your term. To get off on the right foot and avoid common mistakes new board members often make, check out our ebook, "[The Complete HOA Board Member Starter Guide](#)."