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HOA Board Handbook

A practical governance playbook for HOA boards



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Purpose of This Handbook

This handbook exists to help HOA board members work together smoothly, make clear decisions, and reduce confusion and burnout.

It is not a legal document. It is a practical playbook that explains how the board operates, what is expected of each role, and how decisions are made. This is general information and may differ based on the laws in your state or on specific details in your governing documents.

Boards that align early save themselves months of frustration later.

How to Use This Handbook

This handbook is designed to be read quickly and referenced often. Boards should review it together at the beginning of the year, share it with new board members during onboarding, and revisit it whenever questions about roles, meetings, or decision making arise. Make certain the information does not change due to new state and local laws.

This document should evolve as the board and community grow.

1. How This Board Operates

Our Role as a Board

The HOA board is responsible for:

- Maintaining the community
- Upholding governing documents
- Managing shared finances responsibly
- Communicating clearly with homeowners
- Making decisions in the best interest of the association and not to benefit board members

Acting in the Best Interest of the Association

Board members are expected to act in good faith and with care. Decisions should be made based on what benefits the association, not individual preferences or personal relationships.

Disagreements are normal. Respectful discussion and documented decisions protect both the board and the community.

2. Board Roles & Responsibilities

Officers

In most communities, the members vote for “board members” and then those board members elect their own officers. In rare associations, members vote for specific officer positions. The officer positions below are those selected by the board members or directly by the membership, as your state laws and governing documents specify.

President

The President provides leadership and helps the board function effectively.

Responsibilities include:

- Presiding over board and membership meetings
- Setting meeting agendas with board input
- Keeping meetings focused and productive
- Representing the HOA when appropriate
- Ensuring board decisions are carried out

- The President does not act independently of the board

Treasurer

The Treasurer oversees the association's financial health and transparency.

Responsibilities include:

- Overseeing creation and adoption of annual budget
- Overseeing banking and investment of reserve funds
- Monitoring budgets, reserves, and financial reports
- Helping the board understand financial implications of decisions
- Working with accountants or financial professionals as needed
- Supporting clear financial communication with homeowners
- The Treasurer does not approve spending alone unless authorized by the board.

Secretary

The Secretary maintains the association's official records.

Responsibilities include:

- Preparing and distributing meeting notices
- Taking meeting minutes
- Maintaining governance documents and correspondence
- Supporting proper record retention
- Accurate records protect the board and provide continuity over time.

Vice President

Some associations have a Vice President who may take on the President's role when the President is absent.

A Vice President may have specific responsibilities to lead certain committees or perform other tasks, per the governing documents.

Directors at Large

Directors support board operations and represent the community.

Responsibilities include:

- Participating in discussions and voting

- Supporting committees or special projects
- Raising homeowner concerns constructively
- Helping ensure follow-through on board decisions
- All directors share equal voting responsibility, whether they are officers or not.

3. Decision Making & Voting

The board uses a simple, fair decision making process:

- A motion is made
- The motion is seconded
- Discussion occurs
- A vote is taken
- The decision is documented

Not every discussion requires a vote. Votes are typically required for:

- Financial decisions
- Policy changes
- Contracts
- Actions defined in governing documents
- Amending governing documents, where allowed by board and not homeowner vote

Clear documentation of decisions helps prevent confusion and disputes later.

4. Meetings & Annual Rhythm

Types of Meetings

- Regular board meetings
- Special or emergency board meetings
- Annual membership meeting
- Regular membership meetings, if required
- Special membership meetings, as needed

Meeting Expectations

Board meetings should:

- Have an agenda shared in advance
- Start and end on time

- Stay focused on agenda items
- Clearly state decisions and next steps
- Well-run meetings respect volunteer time and reduce frustration.

Membership meetings should:

- Have an agenda shared in advance
- Start and end on time
- Stay focused on agenda items
- Include time for comments and questions from members
- Remain civil and respectful of all present
- Clearly state decisions and next steps
- Well-run meetings respect volunteer time and reduce frustration.
- For election meetings, allow each candidate time to speak; strictly follow in-person and electronic balloting and proxy procedures.

Annual Planning

At the start of each year, the board should:

- Publish a yearly meeting calendar
- Review governing documents
- Confirm officer roles
- Set priorities for the year

Planning ahead improves transparency and trust.

5. Communication Standards

Board to Board

Board members should:

- Use official communication channels whenever possible
- Keep discussions respectful and professional
- Avoid side conversations that exclude other board members
- Avoid discussing association business in groups equal to a quorum of the board members
- Transparency within the board supports better decisions.

Board to Homeowners

Board members should:

- Speak with one voice after decisions are decided
- Avoid making commitments without board approval
- Direct homeowners to official communication channels
- Maintain transparency while respecting confidentiality
- Clear communication reduces conflict and misunderstanding.

6. Code of Conduct

Board members agree to:

- Always act respectfully
- Avoid personal attacks or intimidation
- Declare conflicts of interest
- Maintain confidentiality when required
- Continue to become educated about association laws and best practices
- Act in good faith and in the association's best interest
- Concerns about conduct should be addressed calmly and directly by the board.

7. Documentation & Records

Good documentation protects the board and the community.

The board maintains:

- Meeting minutes, including motions and votes
- Financial records
- Governing documents
- Signed contracts
- Legal opinion letters

Meeting minutes should capture decisions and actions, not verbatim discussion and opinions.

8. Committees & Volunteers

Committees may be formed to support board work.

Committees:

- Must have a clear purpose
- Report to the board
- The board remains responsible for all final decisions after committee reports

9. Annual Board Checklist

Beginning of the Year

- Confirm board roles
- Implement annual budget
- Publish the annual meeting calendar
- Review this handbook
- Set annual priorities

Mid-Year

- Review progress toward goals
- Adjust priorities and budget if needed
- Evaluate committee effectiveness

End of the Year

- Prepare for elections
- Review accomplishments
- Document lessons learned
- Communicate accomplishments to the membership
- Update this handbook as needed

Final Note

Strong governance is not about perfection.

It is about good leaders doing their best to serve the community with clarity, consistency, and communication. Patience and a willingness to listen to varying opinions are keys.

This handbook is a living document. Update it as your board grows and learns.