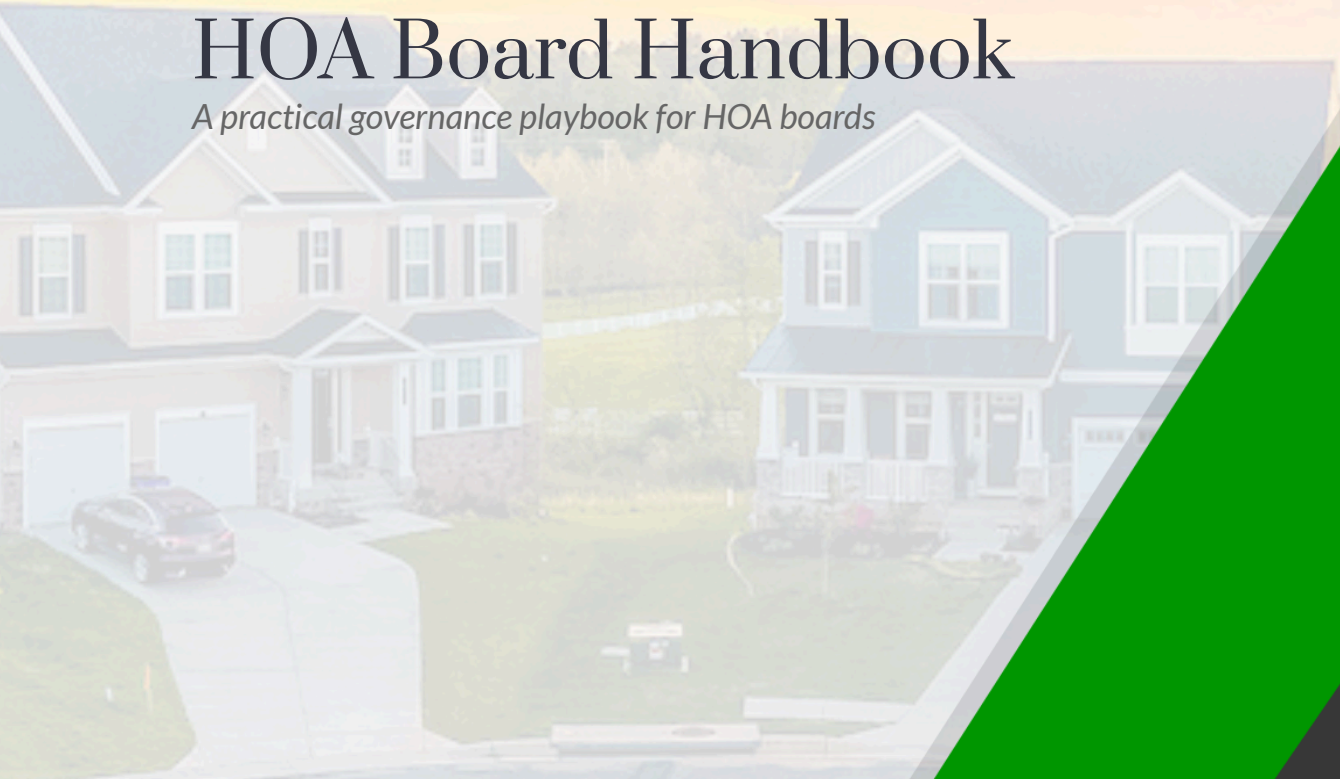
NEIGHBORHOOD .ONLINE™

HOA Board Handbook

A practical governance playbook for HOA boards



https://neighborhood.online

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.

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.

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

Board members act collectively. Individual board members do not make unilateral decisions unless authorized by a board vote.

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 as a whole, 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

President

The President provides leadership and helps the board function effectively.

Responsibilities include:

- Presiding over board and annual 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:

- 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.

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.

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

Clear documentation of decisions helps prevent confusion and disputes later.

4. Meetings & Annual Rhythm

Types of Meetings

- Regular board meetings
- Annual meeting
- Special 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.

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
- Transparency within the board supports better decisions.

Board to Homeowners

The board should:

- Speak with one voice
- 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:

- Act respectfully at all times
- Avoid personal attacks or intimidation
- Declare conflicts of interest
- Maintain confidentiality when required
- 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 agendas
- Meeting minutes
- Motions and votes
- Financial records
- Governing documents

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

8. Committees & Volunteers

Committees may be formed to support board work.

Committees:

- Have a clear purpose
- Report back to the board
- Do not make final decisions unless authorized
- The board remains responsible for all final decisions.

9. Annual Board Checklist

Beginning of the Year

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

Mid-Year

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

End of the Year

- Prepare for elections

- Review accomplishments
- Document lessons learned
- Update this handbook as needed

Final Note

Strong governance is not about perfection.

It is about clarity, consistency, and communication.

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