

Board Member Responsibilities

President

The role of a president in an HOA is to be the **leader, facilitator, and often the face** of the association. Their job is to keep things running smoothly, ensure fairness and transparency, and support the well-being of the community.

A president needs strong leadership, communication, and organizational skills, along with fairness, knowledge of community bylaws, and the ability to manage conflict. They must be a team player who can collaborate with the board, listen to homeowners, and enforce rules fairly while working in the best interests of the entire community.

Duties Include:

◆ Leadership & Meetings

- The Chief Executive Officer of the corporation
- Preside at all meetings of the members and the Board of Directors
- Perform other duties assigned to him by the Board of Directors
- Ensure fair discussion and decision-making
- Encourage board member participation and teamwork

◆ Communication

- Communicate updates to homeowners clearly and regularly
- Respond to homeowner concerns or questions
- Serve as the main point of contact (or delegate as needed)
- Represent the HOA in public or legal matters when required

◆ Decision-Making

- Guide decisions based on governing documents (CC&Rs, bylaws)
 - Vote on board matters; cast tie-breaking vote if needed
 - Support fair and consistent rule enforcement
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◆ **Delegation & Oversight**

- Oversee day-to-day operations
 - Delegate tasks to other board members or committees
 - Monitor vendors, maintenance, and contracts
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◆ **Legal & Financial Duties**

- Ensure compliance with state laws and HOA rules
 - Sign contracts or legal documents as needed
 - Affix the seal when required
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◆ **Conflict Resolution**

- Mediate homeowner or board disputes professionally
 - Promote fair treatment and ethical decision-making
 - Handle sensitive issues with discretion
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◆ **Community Engagement**

- Encourage community involvement and feedback
 - Promote a positive, neighborly atmosphere
 - Welcome new board ideas and fresh perspectives
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Vice President

The role of a Vice President in an HOA, is to serve as a key member of the Board of Directors and support the President in leading the association. The Vice President helps ensure that board

decisions are carried out efficiently and serves as the acting President in the President's absence. This role may also include oversight of specific projects and coordination with homeowners, vendors, or committees as needed.

Duties Include:

◆ Support the President

- Acts as the right hand to the HOA President.
 - Helps plan and run board meetings.
 - May lead special committees or projects.
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◆ Step in During President's Absence

- Assumes the President's duties if the President is unavailable or resigns.
 - Chairs board meetings when the President is absent.
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◆ Participate in Decision-Making

- Has equal voting power with other board members.
 - Helps shape policy and make budgetary decisions.
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Treasurer

The role of a treasurer in an HOA, is to manage the association's funds by collecting dues, paying bills, maintaining financial records, overseeing the budget, and managing the reserve fund. They also prepare financial reports, ensure compliance with tax requirements, and facilitate audits. The treasurer's primary goal is to ensure the HOA's financial health and transparency for its members

Duties Include:

◆ Financial management

- Create the budget: Develop and present the annual budget to the board.
 - Manage the reserve fund: Oversee savings for future capital improvements and emergencies.
 - Pay bills: Authorize and issue payments to vendors and service providers.
 - Manage bank accounts: Sign checks, review statements, and reconcile accounts.
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◆ Dues and collections

- Collect dues: Oversee the process of collecting HOA assessments from homeowners.
 - Handle delinquencies: Manage late payments and implement collection procedures.
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◆ Reporting and record-keeping

- Maintain records: Keep accurate and organized financial records and accounts.
- Prepare reports: Create and present financial reports to the board and homeowners.
- Assist with taxes and audits: Prepare the necessary documents for tax filings and assist with the annual audit.

Secretary

The role of a secretary in an HOA, is primarily to be the official record-keeper and administrative manager, which includes taking and distributing meeting minutes, maintaining and organizing official documents. They also play a key role in communication by sending out meeting notices and managing correspondence between the board, homeowners, and external parties like vendors.

Duties Include:

◆ Meeting preparation and minutes

- Create meeting agendas: Collaborate with the HOA president to draft a clear agenda for board and membership meetings.
 - Send meeting notices: Ensure all homeowners receive proper and timely notification of meetings, including the purpose, date, time, and location, as required by the bylaws.
 - Record meeting minutes: Take accurate and objective minutes during all meetings. The minutes should summarize key discussions, motions made, and votes taken, not be a verbatim transcript.
 - Distribute minutes: Circulate draft minutes to the board for approval shortly after the meeting. Once approved, distribute them to the community members.
 - Archive meeting records: Maintain an organized, accessible archive of all approved meeting minutes for future reference and legal compliance.
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◆ Record-keeping and document management

- Manage official records: Serve as the custodian for all official HOA documents, including the bylaws, covenants, and resolutions.
- Maintain membership list: Keep an accurate and up-to-date roster of all homeowners and their contact information.
- Organize documentation: Develop a clear filing system for all records, whether digital or physical, to ensure easy retrieval upon request.
- Support financial transparency: Work with the treasurer to ensure financial records and reports are well-documented and available to members.

◆ Communication and correspondence

- Act as liaison: Manage official correspondence between the board and homeowners, vendors, or other external parties.
 - Keep the community updated: Distribute community updates, news, or newsletters to keep residents informed of board decisions and community developments.
 - Respond to requests: Address homeowner requests for information or documents in a timely manner.
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◆ Compliance and validation

- Validate documents: Sign or co-sign official documents, such as contracts or approved minutes, to validate them.
- Have custody of the corporate seal and affix it when required

Member-At-Large

The role of members-at-large are flexible and often support the rest of the board without holding a specific officer role. They provide an extra set of hands, represent general homeowner interests, and are active participants in board decisions.

◆ General responsibilities

- Participate in board meetings: Members-at-large must attend all board meetings to stay informed on the board's needs and decisions, and to fulfill their voting responsibilities.
- Contribute to quorum: As voting members of the board, members-at-large are crucial for ensuring a quorum, allowing the board to conduct official business.
- Act as a homeowner liaison: These members can serve as a direct communication link between the board and the general homeowners, providing insight into resident concerns and helping to maintain transparency.
- Vote on board matters: Members-at-large have an equal vote on all decisions brought before the board, including budgets, rule changes, and enforcement actions.