

THE COMPLETE COMMUNITY ASSOCIATION BOARD MEMBER STARTER GUIDE



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INTRODUCTION

Thank you for serving on your community association's board of directors. It's an honorable role, in which you're responsible for daily operations and setting the community up for a strong future.

At Associa, we know that the duties that come with being a board member can feel stressful, but with the help of this comprehensive resource, they don't have to be. Keep reading to learn about the inner workings of associations and get tips to find success in your position.

ABOUT ASSOCIA

With more than 300 branch offices across North America, Associa is building the future of community for more than 7.5 million residents worldwide. Our 23,000+ team members lead the industry with unrivaled education, expertise, and trailblazing innovation. For more than 48 years, Associa has brought positive impact and meaningful value to communities.

To learn more, visit www.associaonline.com.





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CHAPTER 1:

COMMUNITY ASSOCIATIONS

A community association, like a homeowners' association (HOA), is a non-profit organization that's established to help run, manage, and maintain a neighborhood, building, or other collective of homes. Designed to positively impact property values for residents, community associations employ a self-governing system and enforce rules and restrictions.

OPERATIONS

A board of directors is responsible for association operations. Board members are volunteers who enforce governing documents, manage finances, and maintain common areas.

While association residents elect the board members, their responsibilities are unique, and each community operates differently. The association's governing documents detail specific board tasks, powers, and duties.

FUNDING

Association residents are generally required to be members and pay monthly, quarterly, or annual fees to fund operations. Money from fees goes toward a wide variety of uses, like:

- Upkeep of common areas and amenities
- Insurance
- Funding the reserve account
- Other shared community costs

OBJECTIVES

Associations operate like a local government, small business, and community collective rolled into one. Their main objectives include, but aren't limited to:

- Administering the business of the association
- Maintaining shared community property
- Enhancing residential real estate development
- Establishing a system of property rights
- Creating and enforcing rules and regulations

CHAPTER 2:

GOVERNING DOCUMENTS

Governing documents are legally binding documents that explain how a community association is governed. They establish how the community is run and set expectations for residents and the association. Designed to promote harmony, offer guidance, and maintain consistency, all members are required to abide by and thoroughly understand their community's governing documents. Failure to comply may lead to violations and other consequences.

The governing documents typically include:

RECORDED MAP, PLAT, OR PLAN

The recorded map, plat, or plan states where the community and its various structures are located. It displays the precise location of units, lots, common areas, and limited common areas.

ARTICLES OF INCORPORATION

As non-profit organizations, community associations must file articles of incorporation with their designated Secretary of State. These articles of incorporation are brief and simply bring the corporation into existence and define its basic purpose.



DECLARATION OR CODES, COVENANTS, & RESTRICTIONS (CC&Rs)

The CC&Rs are the community's most important and comprehensive documents. They're legally filed and outline the rights of the board, association, and residents. They usually have a legal description of the common areas and amenities, financial requirements, maintenance obligations, and remodeling and development restrictions.

RULES & REGULATIONS

The rules and regulations are an internal document that spells out the community's general guidelines. Longer and more flexible than the CC&Rs, this is where details about things like parking, fence heights, and pets live.

BYLAWS

Bylaws serve as the formal rulebook for the association's administration and day-to-day management. The bylaws contain information on the powers and duties of the association, the board, and the management company. Items like meeting requirements, voting rights, and election procedures are also addressed.



CHAPTER 3: BOARD OF DIRECTORS

Community associations are run by volunteer residents elected by community members. Known as the board of directors, this group is tasked with critical community duties, including enforcing rules, overseeing finances, and maintaining shared spaces. Almost all boards have four officers—president, vice president, secretary, and treasurer. These leaders keep the community running smoothly and residents engaged and satisfied.



PRESIDENT

The president is vested with the same powers typically granted to a corporation's chief executive officer. This officer should guide the board, handle procedural duties, and serve as the spokesperson for business matters.

Duties

- Scheduling and running board meetings
- Creating meeting agendas
- Being the point of contact for community management
- Signing contracts and official documents
- Calling for votes and announcing results

Qualities for Success

- Strong communication skills
- Decisiveness and responsiveness
- Ability to mediate during disputes
- Passion for serving others
- Openness to learning and improving

VICE PRESIDENT

The vice president should support the president and be prepared to stand in for them when necessary. They should familiarize themselves with the same documents as the president and be able to perform the same duties.

Duties

- Presiding over meetings in the president's absence
- Heading committees and acting as liaison to the board
- Overseeing special community projects
- Communicating with vendors and the management company
- Working with the president to achieve community goals

Qualities for Success

- Flexible and versatile
- Dependable
- Able to delegate
- Collaborative
- A clear communicator



SECRETARY

Like any corporation, community associations require substantial paperwork and documentation. The secretary is the official custodian of formal documents, guaranteeing all items are well-maintained.

Duties

- Maintaining and organizing official records
- Taking meeting minutes
- Tracking voting records and results
- Updating membership lists
- Filing forms with state and local agencies

Qualities for Success

- Organizational skills
- Attention to detail
- Good time management
- Multitasking skills
- Confidentiality and discretion



TREASURER

The treasurer oversees all things financial. Often, those functions are outsourced to a management company or an accountant, and it's the treasurer's job to work with them to complete tasks on time and in compliance with governing documents.

Duties

- Preparing the association's budget
- Ensuring the accuracy of financial records
- Overseeing billing and collections
- Reviewing audits and reserve studies
- Paying vendor invoices on time

Qualities for Success

- Experience with accounting or record-keeping
- Sound business judgment
- Problem-solving skills
- Integrity and transparency

CHAPTER 4:

COMMITTEES

Community associations may create committees to support or enhance the board's function. A committee is a small group of residents who concentrate on specific aspects that may require additional oversight, planning, and execution. They can make recommendations, but the board ultimately makes and assumes responsibility for all decisions. To set expectations, it's important for the board to adopt a committee charter that includes:

- Committee purpose
- Goals and objectives
- Composition
- Operational rules
- Decision-making process
- Scope of authority and power limitations

TYPES OF COMMITTEES

All committees fall into one of the following categories:

Mandatory Committee

Mandatory committees exist independently of the board and are clearly stated and described in the association's governing documents. Examples of mandatory committees include the architectural, nominating, and elections committees.

Standing Committee

Standing committees are typically identified in the association's declaration or bylaws. They're function-oriented committees, like a budget and finance committee, and remain in force indefinitely to assist with the association's operations.





Ad Hoc Committee

Ad hoc committees are task-oriented groups that cease to exist as soon as the assigned task is completed. For example, a landscaping committee may be created to coordinate new landscaping at the neighborhood's entrance.

SUGGESTED COMMITTEES

Common committees include:

- Architectural Review Committee
- Welcome Committee
- Social Committee
- Landscape Committee
- Education Committee
- Neighborhood Watch Committee
- Budget Committee
- Contract Review Committee

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CHAPTER 5:

COMMUNITY MANAGEMENT PARTNERSHIPS

Associations may have the option to self-manage; however, it's a big undertaking and can be a full-time job. Board members are volunteers, and many have families, careers, or other interests that can prevent them from properly managing the association. Hiring a professional management company offers continuity, lightens the board's burden and liability, and provides peace of mind.

ROLE OF A COMMUNITY MANAGEMENT COMPANY

Many boards contract with a community association management company or a community manager to fulfill duties they cannot carry out. These companies generally oversee the association's business affairs and provide support for maintenance, accounting, and other operational efforts. While it varies by company, association, and contract, management companies and community association managers can typically help with various, day-to-day tasks.



Administrative

- Overall operations and administration of the association in accordance with board policies, governing documents, and local, state, and federal laws and regulations
- Contract negotiations and oversight
- Contractor and vendor management
- Project management
- Insurance administration
- Dispute resolution assistance
- Meeting attendance and agenda preparation

Maintenance

- Building maintenance
- Grounds maintenance
- Inspections

Financial

- Budget preparation and execution
- Financial report management
- Assessment collection
- Reserve fund analysis
- Billing

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DESIGNATIONS & CERTIFICATIONS

To advance their careers, further their education, and demonstrate their expertise, many community managers seek industry certifications and designations from the Community Associations Institute (CAI). CAI is an international membership organization that offers educational programs, leading to professional designations for community managers and other industry professionals, including:

- Certified Manager of Community Associations® (CMCA®)
- Association Management Specialist® (AMS®)
- Professional Community Association Manager® (PCAM®)
- Large-Scale Manager® (LSM®)
- Accredited Association Management Company® (AAMC®)

Similarly, some states also require community managers to obtain state-specific certifications and licenses.



HOW TO CHOOSE A COMMUNITY MANAGEMENT PARTNER

Selecting a management partner is a serious decision—the effectiveness of a board is often determined by the management it chooses. Boards must carefully evaluate all options and conduct interviews with potential companies. Ask these questions to make the most of interviews and help decide who can best meet the association's needs:

- What kind of services do you provide?
- Are your services flexible?
- How much do your services cost?
- How are associations billed?
- How are your managers educated?
- What type of technology do you provide?
- How will you communicate with the board?
- Do you have additional resources, programs, or partnerships?
- How will you add value to the community?
- Are you up to date with current regulations and laws?
- Do you have the proper licenses, certifications, and insurance?
- What truly sets you apart?

CHAPTER 6:

PROFESSIONAL PARTNERS

Professional advisors and service providers play a crucial role in ensuring your community is protected and prepared for the future, so seek out and value their advice. Associations that create and sustain long-term partnerships benefit from reduced costs, increased efficiency, and stable and reliable operations.

LAWYER

Board members have a fiduciary responsibility to act in the best interest of their community. In doing so, it's in the community's best interest to retain a lawyer to offer advice and carry out directives.

As an advisor and advocate, you'll want to engage your lawyer proactively to recommend a course of action, survey proposed policies, and review contracts.

INSURANCE AGENT

Because the functions of community associations are a blend of business, governance, and activities, their insurance needs are specialized. When it comes to community association insurance, there's no one-size-fits-all approach, product, or service.

Your community needs a qualified association insurance agent to protect the association. A strong insurance program not only safeguards your community in the event of a loss but also fulfills your responsibilities as a board member. Furthermore, it provides residents with peace of mind, knowing that the board has secured appropriate coverage in case an incident occurs.



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CERTIFIED PUBLIC ACCOUNTANT (CPA)

While the treasurer is responsible for the association's funds and for maintaining financial records, many associations are required—both by their governing documents and by law—to engage the services of a CPA.

The right third-party CPA is an invaluable asset, guaranteeing financial accuracy, eliminating bias, and confirming that your association adheres to all regulations. A CPA may help conduct audits, prepare tax returns and annual financial reports, report results to members, and more.

RESERVE SPECIALIST

Ensuring the association's reserves are properly funded is crucial. Hiring a Reserve Specialist or professional Reserve Analyst to perform a reserve study is the best way to plan and budget a reserve fund.

OTHER

In addition to the partnerships with your management company and professional advisors, you'll work with service providers to maintain and enhance your community. Many associations employ service providers for:

- Landscaping
- Pool upkeep
- Maintenance and repairs
- Fire prevention
- Restoration and construction

CHAPTER 7:

MEETINGS

Every community association must hold meetings throughout the year to conduct business, plan projects, voice concerns, and share updates.

TYPES OF MEETINGS

The type, intention, and frequency of these gatherings vary, but most fall into the following categories:

Board Meeting

Board meetings are meetings of elected leaders to conduct association business. Elected leaders must attend, and resident attendance and participation are encouraged. The community association manager or another member of the management team may also be present to help with preparation and execution.

Board meetings should be orderly, respectful, and cordial, and only items on the established agenda should be addressed, unless an open forum is permitted. Minutes should also be taken and made available after the meeting.

Annual Meeting

Annual meetings are the main association meeting. They're held once a year and serve both legal and functional purposes. The time to elect new board members, present the annual budget, discuss board actions, hear committee reports, announce capital projects, and more, all residents, board members, and management representatives should attend. At least 30 days' notice is often needed, and minutes should be taken and made available after the meeting.





Executive Session

When confidential and privileged matters need to be discussed or voted on, the board of directors will hold an executive session. These gatherings are closed to the public, and while residents have a right to know the board is holding an executive session, specific details shouldn't be shared. Because of the sensitive content, minutes shouldn't be distributed after an executive session.

Committee Session

Whether it's a welcome committee, social committee, budget committee, or another type, these groups must meet periodically. Meeting and membership requirements can be found in the governing documents, but committee meetings are usually run like an open board meeting and follow similar notification, minute-recording, and distribution standards.

Emergency or Special Meeting

If necessary, the board of directors can call for an emergency or special meeting. These meetings are rare and should occur only when something needs immediate attention or action, like a severe weather event or disaster. Guidelines are outlined in the community's governing documents, but due to the nature of an emergency or special meeting, it may be held in person, by phone, or by email, and advance notification isn't mandatory. However, minutes should be taken and distributed.

MEETING MINUTES

Meeting minutes are an official record of the actions taken by board members at a meeting. Required by law to be taken at all official board meetings, minutes should be brief, objective, and reflect the actions taken at a meeting, not a complete transcript of what was said and opinions that were expressed. The board secretary or an appointed recorder or assistant secretary should record minutes and include:

- Association name and meeting type
- Meeting location and date
- Time the meeting was called to order and adjourned
- Present and absent board members and their officer positions
- Approval of prior minutes
- Officer and committee member reports
- New business that was discussed and open discussions
- All motions (whether or not they were approved) and actions that were taken
- Names of those who voted for a motion, dissented, and abstained
- All financial transactions (reserve expenses, opening or closing of a bank account, etc.)





PARLIAMENTARY PROCEDURES

Parliamentary procedures are a set of rules that guide conduct at a formal meeting. These procedures ensure all attendees' voices get heard and facilitate easier decision-making. *Robert's Rules of Order* is the most well-known and documented manual of parliamentary procedures.

Robert's Rules of Order is guided by three primary tenets:

1. Meetings should be conducted in a consistent, orderly, and respectful manner.
2. Meetings should be time-efficient and productive, with one task completed before moving on to the next.
3. Voting should be democratic, reflecting the preferences of the majority while still protecting the rights of the minority. Every person in attendance should have an equal opportunity to express their perspective.

Following *Robert's Rules of Order* can lead to a more orderly meeting, increasing productivity and attendance.

AGENDA

A well-prepared agenda can make or break a meeting. An agenda sets the pace of a meeting and offers a schedule of discussion topics, keeping everyone on track. At the very least, provide the meeting agenda to all board members, allowing them sufficient time to create reports, study the issues, and prepare for discussion.

QUORUM

A quorum is the minimum number of members required to hold an association meeting. Having a proper quorum is crucial anytime a board wants to conduct official business, change rules, or vote on new board officers. Quorum legalizes the meeting, and failure to meet quorum means that the event isn't official.

CHAPTER 8:

ELECTIONS

Elections occur when it's time to elect the board of directors. Typically, elections are held once a year at an annual meeting, and community members vote for the new board of directors.

WHY ELECTIONS MATTER

Elections designate who will lead the association and set it up for a strong future. All members should carefully consider each vote and place their support behind individuals they think will best serve the association.

ELECTION PROCESS

The election process can vary. However, most elections follow a similar process that includes:

1. The electoral process is established in compliance with the community's bylaws and governing documents.
2. Announcements and other notifications about upcoming elections and open positions are provided to association members.
3. The election is organized according to the rules.
4. The election is carried out, votes are tallied, and winners are determined. Usually, this happens at the annual meeting, but it can be done by mail or electronically and may take a few days or several weeks.
5. The election is closed, and the new directors and officers assume their roles.

VOTING BY PROXY

Proxy voting allows residents to participate in association affairs and cast their votes—even when they can't attend in person. For proxy voting, a resident must appoint a representative to vote on their behalf and complete a proxy document. While the proxy holder is often a neighbor or family member, the person who can be appointed depends on the laws and governing documents.



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CHAPTER 9:

BUDGETING

A well-structured community association budget is the backbone of a thriving community, guiding financial decision-making and safeguarding the interests of residents.

At its core, the budget outlines expected income and anticipated expenses for the year ahead. It's a spending blueprint for maintaining shared amenities, paying for landscaping, funding reserves for major repairs, and supporting the services residents count on.

BUDGET BREAKDOWN

A standard budget covers three categories:

- **Projected Revenue:** Assessments, fees, and fines
- **Projected Expenses:** Maintenance, insurance, and management
- **Reserve Fund Contributions:** Savings for future repairs or replacements



THE BOARD'S ROLE IN BUDGETING

While board members don't need a financial background to budget effectively, it's important to know what items to review and understand the available resources. A board's financial responsibilities include:

- Drafting and reviewing the annual budget
- Connecting with professional advisors
- Overseeing fee collection and payment policy enforcement
- Updating reserves and conducting regular reserve studies
- Monitoring spending throughout the year and making adjustments as needed
- Communicating clearly about the association's financial health

Community managers can often support budgeting efforts.



CHAPTER 10:

RESERVES

Maintaining a healthy reserve fund is part of a board's fiduciary duty. A task that can be easily overlooked, creating and managing an up-to-date reserve account is vital and often required by law.

RESERVE FUND

A reserve fund is money set aside for additions to major components the association is obligated to maintain and future replacements and repairs that don't occur on an annual basis. Association member assessments, dues, fees, and fines fund reserves. Additional funds can be generated from interest and returns earned on existing reserve accounts.

Reserve fund expenditures often include, but aren't limited to:

- Roof replacements
- Pool pumps
- Playground equipment
- Replacing fencing in common areas
- Painting of community-associated buildings
- Major landscaping projects
- Construction and major renovations
- Road and sidewalk resurfacing



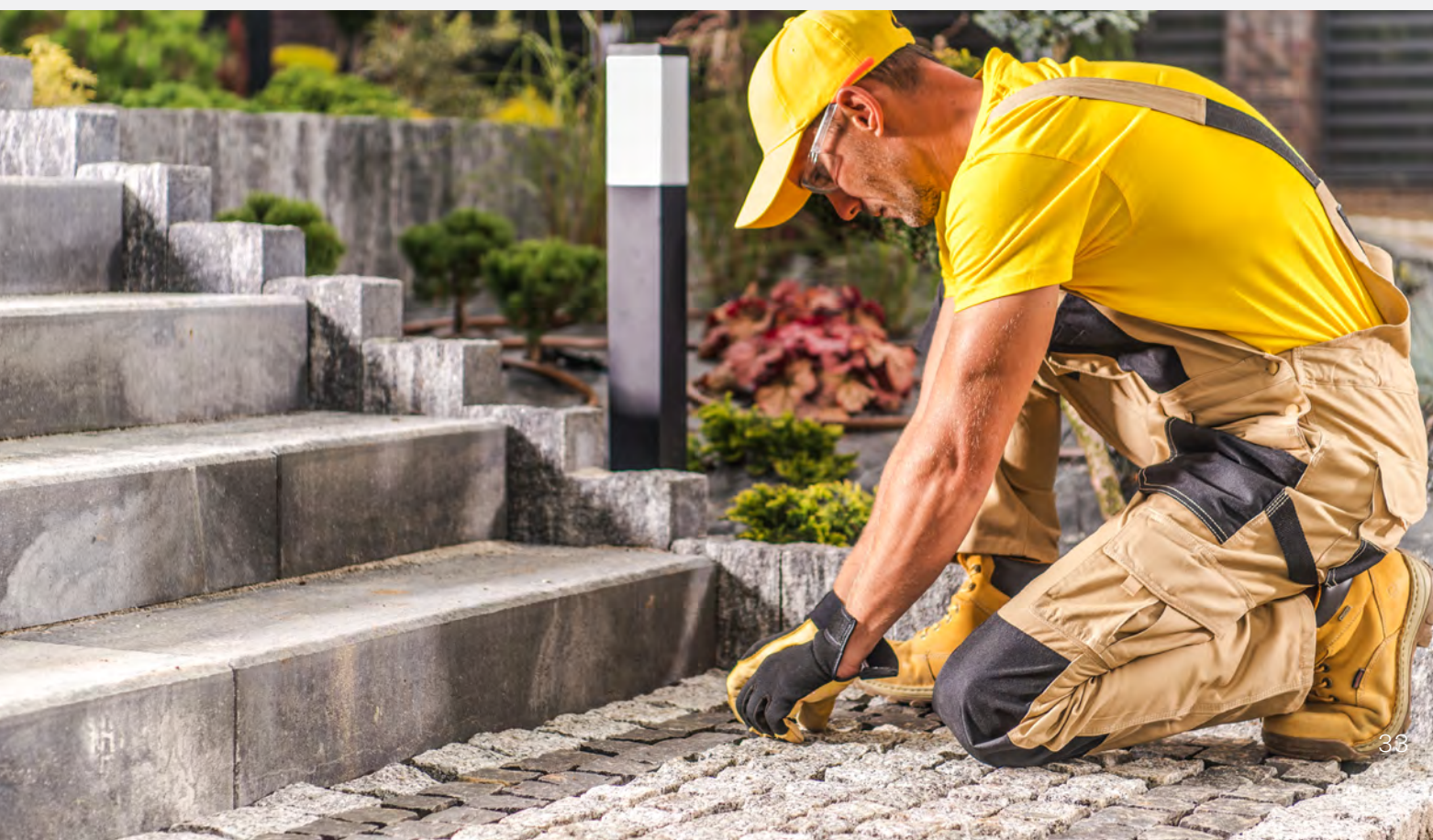
RESERVE STUDY

A reserve study looks at a property and its reserve account and analyzes all foreseeable capital improvements and repairs. For example, if your community has a clubhouse with a roof that needs to be replaced every 10 years, the reserve study will advise how much and how quickly your association needs to save to make the repair at the appropriate time.

Typically, reserve studies are comprised of two parts:

- **Physical Analysis:** Evaluates the physical status of the association and estimates the repair and replacement costs of the major common area components.
- **Financial Analysis:** Assesses the current reserve fund status and recommends an appropriate reserve contribution rate.

Because reserve studies are so complex, it's recommended to hire a qualified and experienced Reserve Specialist or Reserve Analyst to conduct a reserve study.



CHAPTER 11:

FEES, FINES, & SPECIAL ASSESSMENTS

Community associations generate their operating funds by collecting fees, fines, and special assessments from association members. This money allows the association to carry out its responsibilities.

FEES

Fees are the monthly, quarterly, or yearly dues that residents pay to the association.

Fees are directly tied to the size, cost, and complexity of the association's shared amenities and other operational expenses. What fees cover depends on your association. For example, in some master-planned communities, fees may help pay for swimming pools, fitness equipment, and other amenities like tennis courts and parks. Condo associations may use their fees to maintain lobbies and pay for a trash valet.

FINES

Primarily issued to enforce community guidelines, fines are an indirect source of income for an association. Fines are issued for violations of community rules and standards. Violations can vary but may include offenses like ignoring lawn care, parking in undesignated areas, or violating noise restrictions.

SPECIAL ASSESSMENTS

Occasionally, a board may need to pass a one-time special assessment to pay for an unexpected cost, such as an increase in insurance or a surprise repair bill for a pool or clubhouse. The amount, rules, and processes for adopting a special assessment vary by association.



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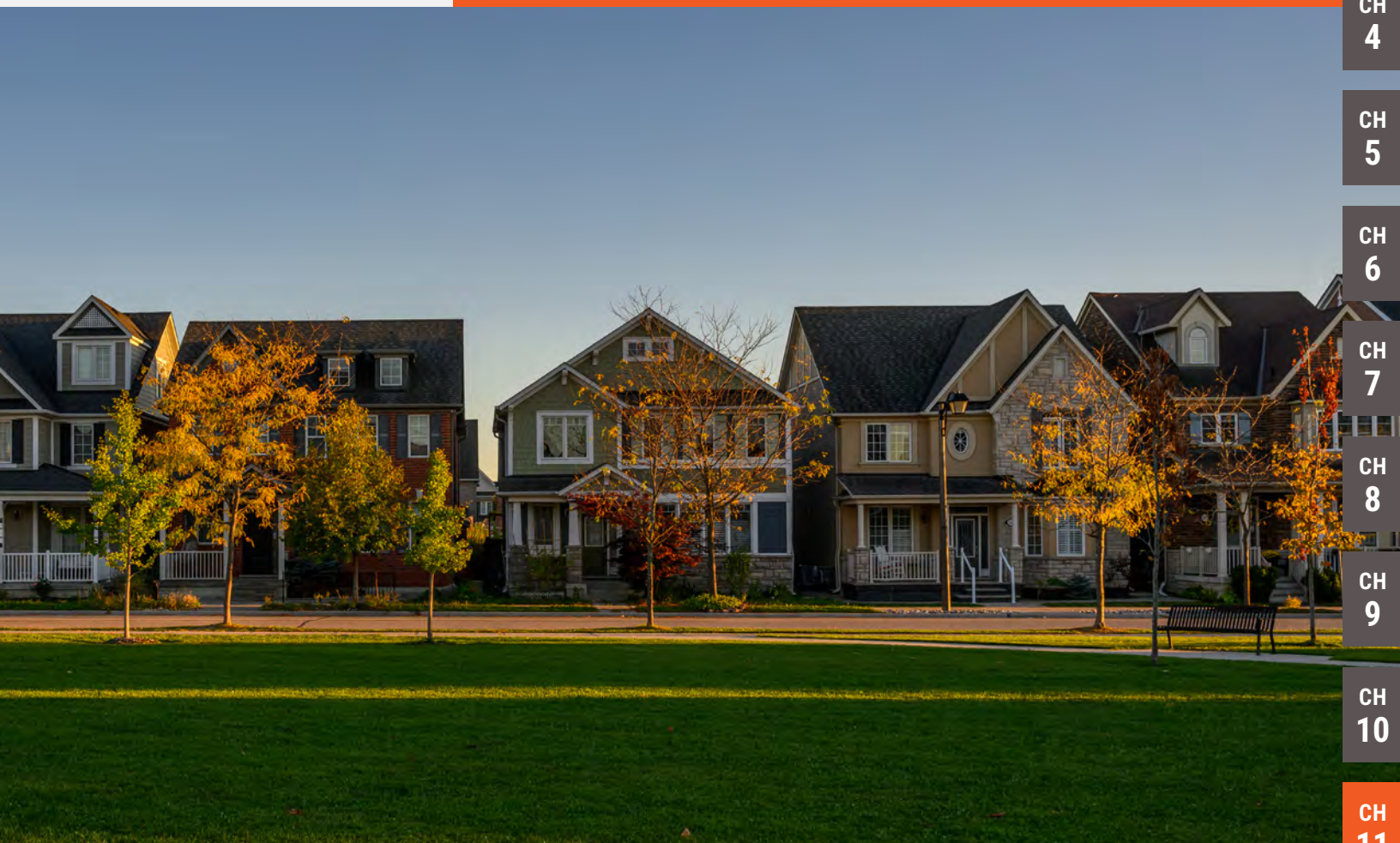
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CHAPTER 12:

RULES

All community members must comply with established rules and regulations. The primary purpose of community rules and standards is to protect investments and provide a common framework for neighbors.

BENEFITS OF RULES

At first glance, community rules may seem restrictive. However, many benefits come with having a robust set of guidelines, including:

- Preserving the aesthetics of an area
- Protecting and enhancing home values
- Enforcing CC&Rs and bylaws
- Maintaining the property of the association and its owners

COMMON RULES

Every community is unique, but some guidelines are standard, including:

- Architectural controls
- Lawn and holiday decoration restrictions
- Home maintenance standards
- Noise complaint policies
- Home occupancy limits
- Parking rules and guidelines
- Pet size and quantity limits
- Short-term rental restrictions
- Trash and recycling rules





CREATING NEW RULES

The board often has the authority to adopt new rules or modify existing ones. If these rules significantly alter the governing documents, a member vote may be required. The following are five crucial questions every board needs to ask before passing new rules, regulations, and policies:

1. Does the community really need another rule?
2. Is the rule allowed by governing documents and current laws?
3. Is the new rule clear, and can residents easily follow it?
4. Is the rule objectively fair and reasonable?
5. Will the board and management team be able to enforce the rule easily?



CHAPTER 13:

VOLUNTEERS

Committed volunteers are the backbone of a community association. Whether volunteers serve on committees, help at neighborhood gatherings, or sit on the board of directors, there are various levels of involvement needed for the community to thrive.

RECRUITING VOLUNTEERS

Here are seven simple ways to assemble a team of volunteers that will want to serve on the board of directors in the future:

Ensure a Comfortable Environment

Residents will be more likely to volunteer in a comfortable environment where they know they'll be treated with respect. Boards should always take the time to learn people's names, welcome visitors, and let them know they're appreciated.

Stay Organized and Efficient

When meetings are disorganized, last longer than two hours, or board members show up unprepared, it discourages people from volunteering. If you want residents to volunteer, prove that you're efficient and respectful of their time. It helps to schedule meetings in advance, prepare an agenda, and anticipate questions ahead of time.



Personally Reach out

Don't wait for volunteers to sign up—actively recruit and reach out to them first. People tend to respond to a personal invitation rather than filling out a form.

Keep It Short-Term

Ask residents whether they'd be interested in volunteering for a short-term project, like planning an event. Short-term commitments help build relationships and make people feel at ease and connected.

Conduct Orientations for New Residents

Not all community members understand how the board of directors operates. Hold orientations for new residents, so they can get to know their neighbors and understand the community.

Be Open to Suggestions

Don't immediately dismiss new volunteers. If they suggest something that has already been done or didn't work, provide background information, and work together to find a new solution. People want to be heard and feel like they're making a difference.

Recognize Volunteers

Thank and recognize volunteers and their efforts regularly and publicly. It can be as easy as highlighting achievements at board meetings or hosting a volunteer appreciation event.

CHAPTER 14:

COMMUNICATION

Part of being an effective leader is maintaining transparency. By being transparent, you're keeping residents—constituents who help fund operations—informed of what's happening within the community and the board that leads it.

Communication is most successful when it takes a variety of forms—personal and public, written and verbal. The more forms of communication delivered, the better. You want to make sure that owners have plenty of opportunities to receive or access information.

BOARD & INFORMATIONAL MEETINGS

Increase meeting attendance and participation by setting the schedule one year in advance. Adopt an agenda policy that makes it easy for the board, chairs, and owners to understand the order of business. Address meeting notices, open forums, and how new business gets presented. In times when face-to-face meetings aren't an option, have a virtual solution in place.

WEBSITE

A website is a great tool for distributing real-time information. Links on the site can include phone numbers, board members, association photos, and events.

WELCOME LETTERS & WELCOME COMMITTEE

Show new residents you're an involved community and make a good first impression by sending a welcome packet. The welcome packet should have all the helpful information an owner needs. A greeting from a welcome committee is also a nice personal touch.

NEWSLETTERS

Establish an ongoing, scheduled newsletter, and make sure it's accessible in both print and electronic formats. Include articles on board briefings and annual meetings, but make the feature articles consumer-focused, covering legal issues, trends, and general information aligned with your members' demographics.



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PERSONAL OUTREACH

Reach out to residents via email or phone to gather their feedback on community living—social activities, committees, rules and regulations, and more. Their opinions matter, and they'll appreciate your transparency and candor.

COMMUNITY APPS

Today, many people use their phones for everything from social networking to grocery shopping. Setting up an app for your association will appeal to the millennial demographic and tech-savvy owners. They value a mobile tool that lets them reserve amenities, access documents, pay assessments, and engage with neighbors.

SOCIAL ACTIVITIES

Stimulate member interactions and establish board contacts through social activities. Organize, plan, and show up—members want to see the faces of the board. Holiday and block parties are excellent, but consider what appeals to your membership.

BULLETIN BOARDS

Place a bulletin board in a clubhouse, gatehouse entry, or another centrally located area so members can post and access information. Additionally, you can invite service providers to post fliers and advertisements and enable members to post items for sale.

DISASTER DRILLS

Having an emergency preparedness plan tells residents that you're proactive and care about their safety and well-being. Identify emergencies that could affect your community and create a plan for those potential threats. Hold disaster drills and encourage your community to get involved.

Leave *community management* to us.

Associa is a partner you can trust to lead your community to success. Providing top-tier management, secure financials, customizable insurance, and advanced technology, our comprehensive suite of services creates greater efficiencies. Lean on Associa for professional management support, so you can focus on what matters most to your community.

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