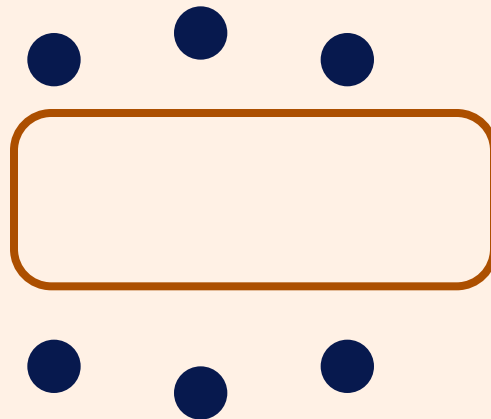


The new community association board member's handbook

Build a practical first-month plan: learn what the association is responsible for, find its records, understand its finances, and agree on how the board will make and track decisions.



A PRACTICAL GUIDE + WORKSHEET

New HOA, POA, and condominium board members

Start with the association you actually govern

An HOA, a property owners association, and a condominium association can perform similar daily work while operating under different recorded property arrangements and statutes. Start by collecting the declaration or master deed, amendments, articles, bylaws, rules, and the current board roster. Identify which documents are recorded and which are working policies. Ask counsel to resolve conflicts instead of choosing whichever document gives the easiest answer.

Make a responsibility map before accepting requests. Which roofs, roads, drainage facilities, landscaped areas, or amenities belong to the association? What is the owner responsible for? Mark unknowns as questions. A resident's expectation, an old email, and a recorded maintenance obligation are different kinds of evidence. This first map helps the board avoid promising work it has not authorized or neglecting work it must address.

Learn the financial story without becoming the accountant

Ask for the approved budget, recent financial statements, bank reconciliations, assessment aging, reserve information, insurance, and major contracts. Look for explanations rather than isolated balances. A healthy-looking bank balance may include money intended for future repairs or bills that have not yet cleared. Ask who prepares the reports, who reviews them, and what unresolved items require follow-up.

Create a short question list for the treasurer or accountant: Which expenses are increasing? Are owners paying according to schedule? What work is planned? Are important filings and renewals assigned? Federal tax treatment is a separate question from nonprofit incorporation; the IRS provides a specific association return and eligibility rules. Have a qualified adviser confirm the filing choice.

Agree on how work reaches a decision

Clarify officer roles, committee authority, spending approval, meeting preparation, and who speaks for the board. A volunteer can investigate an issue without having authority to promise a contract or exception. Use a shared agenda and a decision log so that questions, decisions, and assigned actions do not blur together.

Check applicable meeting, election, notice, records, conflict, and enforcement rules before changing procedures. Minnesota's agency guidance is one example of the kinds of rights and responsibilities a state may address; it is not a national rulebook. Record the source of a requirement beside the board calendar item it affects.

Make continuity part of the job

Use association-controlled accounts and named access wherever available. Keep institutional records outside one volunteer's personal inbox. Record where documents live, who administers the system, and how an authorized successor can recover access. Store recovery information securely rather than in public minutes.

At the end of the first month, summarize what you know, the unanswered questions, and the next three priorities. Resist rewriting every process at once. A dependable meeting packet, a reconciled financial view, and a visible action list often provide a stronger foundation than launching many new projects without owners.

A repeatable working process

01 Collect and label the governing documents, noting missing amendments and legal questions.

02 Meet with officers and service providers to map responsibilities and account access.

03 Read one recent financial packet and trace one payment, invoice, and open request.

04 Confirm the upcoming meeting, renewal, filing, and maintenance calendar.

05 Present a short first-month findings list with an owner and follow-up date for each gap.

A worked example

Illustrative example: A newly elected secretary finds three versions of the rules and an unresolved landscaping request. Instead of sending a new rule announcement, the board identifies the adopted version, asks counsel about an apparent conflict, and gives the landscaping request to the maintenance lead. The next meeting packet shows both items, their status, and who is responsible. No approval is implied by placing an issue on the list.

Adapt the example to your documents, approved authority, service scope, and local requirements.

Make the plan your own

Use this writing space with your team. Keep private owner information and account secrets in an appropriately restricted system.

Governing document / version / where stored

Shared asset / responsibility / evidence

Account or provider / administrator / successor

Unanswered question / adviser / follow-up date

First-month priority / decision needed / owner

Before you call it complete

- ☐ Current documents and amendments identified
- ☐ Board and committee authority clarified
- ☐ Financial review and reconciliation owner identified
- ☐ Critical renewals and deadlines assigned
- ☐ Conflicts and sensitive matters routed appropriately
- ☐ Association-controlled access documented
- ☐ Open work has an owner and next step
- ☐ First-month findings shared with the board

Keep the evidence with the plan

Original EasyHOA editorial guide, edition 1.0. Published and sources consulted October 29, 2026. The workflows, fictional examples, and worksheets are our own; the sources below provide background and jurisdiction-specific reference material.

Minnesota Department of Commerce: rights and responsibilities

A state-specific example of board and owner roles; Minnesota rules do not automatically apply elsewhere.

<https://mn.gov/commerce/consumer/realestate/cic/rights-responsibilities.jsp>

Internal Revenue Service: Form 1120-H instructions

Federal association tax background. A qualified tax adviser should determine eligibility and filing choices.

<https://www.irs.gov/instructions/i1120h>

Federal Trade Commission: cybersecurity for small business

Practical background on account protection, backups, and vendor security.

<https://www.ftc.gov/business-guidance/small-businesses/cybersecurity>

Use the right professional for the question

This is general educational planning material, not legal, accounting, tax, engineering, or safety advice. State law, recorded documents, contracts, and association type can change the right process. Confirm legal and technical requirements with qualified advisers. Worksheets are not legal forms.

Choose one process to improve

Name an owner, agree on a next step, and review the result at your next working session. Preserve the sources and decisions so the next board can continue the work.

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