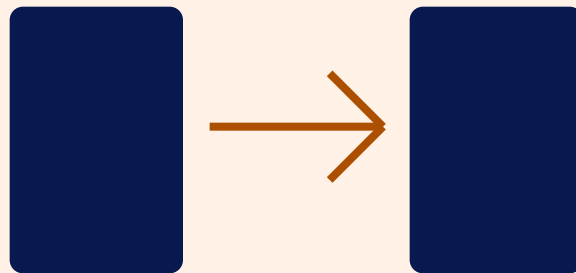


Moving to self-management: a transition planning guide

Evaluate capacity before changing the contract. Build a transition plan for money, records, systems, service providers, resident communication, and the work that still needs professional help.



A PRACTICAL GUIDE + WORKSHEET

Boards considering leaving professional management or reducing its scope

Decide what self-management means for this community

Self-management does not mean volunteers must perform every specialized task. The board may retain legal, accounting, reserve, maintenance, insurance, or administrative support. Start by mapping the work the current manager performs, including tasks that are easy to miss because they occur annually or behind the scenes.

Identify hours, skills, authority, and backup coverage for each function. Who handles owner questions during a volunteer's absence? Who reconciles the bank account? Who coordinates urgent maintenance? Colorado's agency overview describes self-management and professional management as options; the practical choice depends on capacity and the association's obligations, not only a fee comparison.

Review the contract and legal transition requirements

Have the management agreement reviewed for termination, notice, fees, data return, records, open commitments, and responsibilities at the changeover. State law may supply additional requirements. Do not assume a generic checklist gives the board authority to terminate immediately or that a software export contains every required record.

Keep the management-company transition distinct from a transfer of developer control. Each has its own documents, authority questions, and potential technical or financial issues. Where a dispute exists over records or funds, preserve evidence and obtain professional advice rather than trying to solve it through changes to account access alone.

Move the information and money carefully

Inventory bank accounts, ledgers, outstanding checks, deposits, owner balances, unpaid bills, contracts, insurance, governing documents, maintenance files, and open legal matters. Establish a cutoff date and reconcile opening balances. Record who supplied each file and what remains missing.

Use secure transfer methods for owner and financial information. Set up association-controlled accounts and named permissions, and test recovery access. Coordinate changes to bank authority and service access through the appropriate authorized processes. Avoid a gap where payments are still going to an old address while the new team believes the transition is complete.

Pilot the new routine before relying on it

Test a sample invoice, owner inquiry, payment reconciliation, maintenance request, and monthly report. Confirm that a second person can complete critical steps when the primary volunteer is unavailable. Assign professional escalation routes for legal, safety, tax, and other specialized matters.

Tell residents exactly what changes, what stays the same, when the change takes effect, and where to ask questions. Monitor exceptions during the first several billing and reporting cycles. A successful transition is demonstrated by dependable work and reconciled records, not simply the cancellation of the old contract or purchase of new software.

A repeatable working process

01 Map every current management function, its effort, risk, and proposed new owner.

02 Review the contract and applicable transition requirements with qualified advice.

03 Inventory records, funds, balances, contracts, systems, and unresolved work.

04 Reconcile the cutoff and pilot the new billing, reporting, and service routines.

05 Communicate the change and review exceptions after each initial cycle.

A worked example

Illustrative example: A 60-home association wants to self-manage. Two volunteers can handle communications and vendor scheduling, but neither can maintain reliable monthly bookkeeping. The plan retains accounting support, assigns a backup for inquiries, and delays the operational cutoff until the first financial reconciliation and payment instructions are verified. The decision is based on capacity, not a promise of universal savings.

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.

Management function / proposed owner / backup

Contract requirement / adviser / verified deadline

Record or account / supplied by / gap

Cutoff balance / reconciliation / reviewer

Pilot result / exception / correction

Before you call it complete

- ☐ Capacity and backup coverage assessed
- ☐ Contract reviewed before termination
- ☐ Developer and management transitions distinguished
- ☐ Records inventory complete
- ☐ Opening balances reconciled
- ☐ Secure access and recovery tested
- ☐ Resident instructions confirmed
- ☐ First-cycle exception review scheduled

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.

Colorado Division of Real Estate: managing your HOA

A state agency overview of self-management and professional management options.

<https://dre.test.colorado.gov/division-programs/hoa-office/managing-your-hoa>

Massachusetts Legislature: Chapter 183A section 10

A condominium example addressing organization records and manager handoff; not a national deadline.

<https://malegislature.gov/Laws/GeneralLaws/PartII/TitleI/Chapter183a/Section10>

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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