PRG HOA MANAGEMENT

New Board Member: First 30 Days

A practical orientation checklist for joining a condo or HOA board without inheriting chaos.

> Your first month is not about fixing everything. It is about understanding the association, finding the records, learning who does what, and identifying the few decisions that cannot wait.

FIRST 30 DAYS

☐ **Get the governing documents.** Read the declaration/CC&Rs, bylaws, rules, and any current policies before voting on unfamiliar issues.

☐ **Read the last 6-12 months of minutes.** Look for unfinished decisions, recurring complaints, major contracts, pending projects, and commitments the new board may have inherited.

☐ **Review the current budget and latest financial package.** Know operating cash, reserves, receivables, major unpaid bills, and any special assessment.

☐ **Confirm bank access and controls.** Know who can view accounts, approve payments, sign checks, and reconcile statements.

☐ **Review insurance.** Locate current property, liability, D&O, fidelity/crime, umbrella, and other policies; note renewal dates and deductibles.

☐ **Build the vendor list.** Identify current vendors, contacts, contracts, renewal/termination dates, insurance certificates, and open work.

☐ **Find the open-project list.** Roofing, masonry, plumbing, leaks, insurance claims, legal matters, code issues, and reserve-study recommendations should all be visible.

☐ **Confirm owner and unit records.** Make sure contact information, occupancy, leases, parking/storage, emergency contacts, and balances are current.

☐ **Learn the communication system.** Know where owners submit requests, where board decisions are documented, and which communications become association records.

☐ **Clarify board roles.** President, treasurer, secretary, directors, committees, management, attorney, accountant, and vendors should each have defined responsibilities.

☐ **Identify the next 90 days of deadlines.** Meetings, budget work, renewals, filings, insurance, seasonal work, inspections, and major payments.

☐ **Choose the top three priorities.** Do not let the loudest issue become the only issue. Rank by safety, legal/financial exposure, building preservation, and owner impact.

BOARD NOTES / NEXT STEPS