

PIONEER REALTY GROUP

HOA Board Continuity Plan

Keep knowledge, decisions, and responsibilities moving forward - even when board members change.

A practical working guide for volunteer HOA boards

Association	_____
Prepared / Updated	_____
Board Lead	_____
Next Review Date	_____

How to use this plan

Complete the fill-in pages with the current board. Review the plan after elections, officer changes, a major project, a management transition, or any time important knowledge is sitting with one person.

This is an operational tool - not a replacement for your governing documents, legal advice, or formal board action.

The continuity standard

Keep Current	So the Board Can
One shared source of truth	Find records, contacts, decisions, and deadlines without relying on one person.
Clear ownership	Know who is responsible for each open item and when it should move.
A repeatable handoff	Bring new officers and board members up to speed quickly and confidently.

1. The Board Continuity Binder

Maintain one shared folder or secure portal location. Every current board member should know where it is and who can access it.

Governance & board leadership

- Current roster, officer roles, and contact information
- Declaration, bylaws, rules, policies, and approved amendments
- Meeting calendar, recent minutes, annual-meeting materials, and election records

Finances & insurance

- Current budget, financial reports, bank information, reserve plan, and collection policy
- Insurance policies, renewal dates, agent contacts, and claims history
- Tax filings, annual reports, audit/review materials, and owner-account records

Operations & vendors

- Vendor list, contracts, warranties, insurance certificates, and renewal dates
- Property access details, emergency contacts, maintenance history, and recurring schedules
- Management contact list, communication templates, and owner portal information

Projects & board decisions

- Open project file: scope, bids, approvals, budget, vendors, schedule, and owner notices
- Decision log: what was decided, date approved, who owns next steps, and relevant supporting documents
- Current risks, unresolved issues, and items awaiting board action

Set one owner for the binder

Primary custodian	_____
Backup custodian	_____
Shared folder / portal location	_____
Last full review	_____

30-Day Transition Checklist

Use this when a board member or officer joins, leaves, or changes roles. The goal is not to make the new person an expert overnight; it is to give them the context needed to make responsible decisions.

When	Action	Owner / Notes
First 7 days	Confirm the new member's role, contact information, and access to the board's shared workspace.	
First 7 days	Provide governing documents, the current budget, most recent financials, minutes, and meeting calendar.	
First 14 days	Review active projects, current vendor issues, owner concerns, upcoming deadlines, and legal/compliance items.	
First 14 days	Transfer or update necessary logins, email aliases, bank permissions, portal access, and vendor contacts.	
First 30 days	Review the open-item log together. Assign an owner and next step to every active board matter.	
First 30 days	Have the new member attend a short handoff meeting with the outgoing officer, board lead, and management partner.	

Officer-specific handoffs

Role	Must Know Before Handoff Is Complete
President	Current priorities, board decision process, owner communications, vendor escalation path, and meeting cadence.
Treasurer	Budget status, account balances, reserve plan, invoices, collections, tax/filing dates, and bank access.
Secretary	Meeting records, notice requirements, election records, governing documents, and document storage process.
At-large member	Current priorities, open decisions, project status, board expectations, and how to locate key records.

Handoff meeting notes

Date / participants: _____

Top three active priorities: _____

Items that need a board decision: _____

Risks or sensitive issues to understand: _____

3. Access, Records & Key Contacts

Do not place passwords in this document. Record where they are securely stored and who has authority to access each account.

System / Record	Where It Lives	Authorized Users	Review Date
Banking & payment platform			
HOA portal / website			
Association email			
Shared documents / cloud folder			
Insurance carrier portal			
State filing / registered agent			
Vendor records / contracts			

Key contact directory

Role / Company	Name	Phone / Email	Notes
Management partner			
Insurance agent			
Attorney			
Accountant / tax preparer			
Bank contact			
Emergency vendor			

4. Open-Item Handoff Log

This page matters most. A project or problem is not fully handed off until it has an owner, a next step, and the supporting information in the continuity binder.

Open Item	Status / Decision So Far	Next Step & Due Date	Owner

Board decision log

Date	Decision	Supporting File / Minutes	Follow-Through Owner

5. Annual Board Continuity Calendar

Add your association's actual dates. Review this calendar at the beginning of each year and again 60 days before any major deadline.

Timing	Recurring Board Work	Association Date / Owner
January - March	Budget review, insurance renewal planning, annual-report or tax deadlines, owner-account review.	
Spring	Property inspection, maintenance planning, vendor renewals, reserve and capital-project review.	
Summer	Annual meeting planning, nominations/elections, midyear financial review, owner communication check-in.	
Fall	Next-year budget preparation, insurance renewal, vendor bids, project scheduling, policy review.	
Year-end	Approve budget, confirm officer roles, update continuity binder, archive minutes and key records.	

Annual continuity review

Check	Complete / Notes
Board roster, officer roles, and contact directory are current.	
All shared-folder and portal access is correct; former members are removed.	
Open-item and decision logs are current.	
Vendor contracts, insurance, financials, and key deadlines are easy to locate.	
A transition meeting is scheduled if board roles will change.	

A board does not need perfect institutional memory. It needs a reliable system for preserving what matters and passing it forward.