

# EFFECTIVE BOARD COMMUNICATIONS



# THE ROLE OF THE COMMUNITY MANAGER

1. Assist Board members in the performance of their duties as a member of the Board of Directors
2. Provide direction, recommendations and experience to assist the board in their decision making
3. Assist the Board of Directors in moving the Association forward according to the Board's decisions, guidelines established by the community governing documents (CC&Rs, Bylaws, Design Guidelines, etc.) and within the confines of Texas Law
4. Creating and supporting a partnership with the Board of Directors and the Association by working together as a team towards the association's goals, as set forth by the Board of Directors
5. Act as a liaison between the Board and Owners, with all resident correspondence coming through the management company for proper processing



# APPOINTMENT OF BOARD LIAISON

---

- In an effort to streamline communication between the Board of Directors and the Community Manager, the Board should appoint one Director to be the primary point of contact with the manager.
- In most cases, the Board President is appointed as the liaison. It doesn't have to be the President but it should be a board member with experience and the rest of the board trusts them to represent the Board.
- The Board should appoint an alternate liaison to be available when the primary liaison is not available.
- Sometimes, the Vice President is appointed as the alternate but it can be any director.
- Regardless of whom the Board appoints, the primary and alternate liaison should be someone who has the time available to dedicate to the Association and Community Manager when needed.



# PURPOSE OF BOARD LIAISON

The purpose of the Board Liaison is to streamline communication between the Board, Community Manager and Owners:

1. Have one Director take the lead, on behalf of the entire Board, to provide guidance and help troubleshoot matters that may arise with the Community Manager. This prevents having multiple 'bosses' providing direction to the Community Manager.
2. Report back to, poll or request a vote from fellow board members, when necessary, regarding association business matters.
3. Be available to access the property onsite in the event of an emergency.
4. Meet with vendors onsite for special projects, to verify the scope of work or to provide access to a common area if needed.



# ASSISTANCE FROM BOARD LIAISON

---

The Board Liaison plays an important role in conjunction with the community manager to:

- Provide guidance on important association matters
- Help determine the urgency of a matter and whether it requires immediate board attention
- Provide historical information and data regarding the community
- Review written correspondence/proofread content to ensure accuracy of board directives
- Assist the community manager with finalizing meeting agendas, meeting materials, bids, proposals and other items the board is working on
- Be the board liaison with association legal counsel
- Assist with contract negotiations and sign all agreements and contracts approved by the board
- Assist with obtaining a board vote on matters requiring an action without a meeting

# IMPORTANT POINTS TO REMEMBER

---

- THE BOARD LIAISON SHOULD NOT MAKE DECISIONS THAT REQUIRE THE VOTE OF THE BOARD AS A WHOLE, WITHOUT THE KNOWLEDGE OF THE OTHER BOARD MEMBERS.
- EACH BOARD MEMBER HAS ONE VOTE AND THE BOARD VOTES AS A WHOLE ON ALL MATTERS REQUIRING A BOARD VOTE
- EXCEPTION:
  - In the event of an emergency which could result in damage to association property and or is causing a threat to life or safety.
  - Under these circumstances the community manager and board liaison should take immediate actions to mitigate the situation and the board liaison can inform the other board members of the situation and what action was taken.



# THE ROLE OF THE BOARD & RELATIONSHIP TO EACH OTHER

---

- It is crucial that the Board provide a unified front to the membership.
- Discussions – It is essential for the individual Board members to present different views on a given subject.

## **You will be required to confront difficult issues:**

- Potential Assessment Increases
- Contract Changes
- Homeowner Appeals
- Compliance Matters
- Enforcement Action
- Foreclosure Action
- However, once the vote is taken and majority rules, attempt to put personal differences aside and move forward.
- Always be respectful of fellow Board members and those in attendance at the meeting.
- Avoid using Social Media to voice differences between Board Members

# ADDITIONAL HELPFUL TIPS

---

- **TIP # 1:** Encourage Board Members to get a separate email account! Setting up a new email account with a popular email service can take less than two minutes. This will help separate personal emails from association business. It can also help board members find association items much quicker instead of having to sift through their personal email.
- **TIP # 2:** Never make disparaging remarks about homeowners or board members. Emails can be discoverable in the event of litigation.
- **TIP # 3:** Communication as a Board Member with Homeowners. Be careful to not make decisions as an individual Board member outside of a Board meeting. If a homeowner approaches you with, for example, a request to change window coverings in their unit, OR requesting to waive late fees. Do not make any promises or suggest that it sounds “okay to you”. Have the homeowner contact the Community Manager so that they go through the process of getting either ARC approval and/or Board approval as applicable. Board members should refer all resident inquiries to the Community Manager.



# ADDITIONAL HELPFUL TIPS

---

- **TIP # 4:** Be Conscientious About Not Discussing Board or Association Business Outside of a Duly Called Board Meeting whenever possible. There will be times when a quorum of the Board is present, for example, at a community social gathering or event or even a holiday party at someone's home. Make it a point not to discuss HOA business in these circumstances to avoid the perception that the Board is making decisions and voting on a whim with no documentation or not following any protocols.
- **TIP # 5:** The Board should circulate a newsletter on regular basis or maintain a website for the community to keep members informed and provide an avenue for members to access association documents and information.
- **NOTE:** In Texas, a Board of Directors can take an 'Action Without a Meeting,' but the governing documents dictate the requirements for voting on matters outside of a regular board meeting. Either all board members have to agree (unanimous), or a quorum (majority) is required. If the documents are silent then refer to Association legal counsel for an opinion about your particular community.

A person wearing a white lab coat is holding a blue pen over a spiral-bound notebook. The image has a light blue overlay. The word "QUESTIONS?" is written in large, white, bold, sans-serif capital letters across the center of the image.

# QUESTIONS?

**Thank You!**