



COMMUNITY BUILDER

New Board Members? Set the Stage for Success!

With budget season wrapping up and many annual meetings completed or scheduled, this is a time when Board elections occur, and possibly new Board Members begin serving. This is a great time in the life of the association; a time for new perspectives, a fresh set of eyes, and new skills and experience to help govern the community. Even the most experienced individual cannot be successful without a solid foundation and support from existing board members and the management partner.



Ashley Chiorando, Sentry's Vice President in Tampa/Clearwater, FL, had this to say about newly elected Board Members: "New Board Members are often met with a large learning curve when it comes to understanding everything about the association. While some Board Members may have prior experience, many find themselves in this position for the first time. That is why support is so important right at the start."

The following are just a few steps that new Board Members, and the Board as a whole, can follow to support a successful transition of leadership in the community:

Get organized

The first meeting of the Board following the election, sometimes referred to as the organizational meeting, serves as the time for newly elected members to determine roles amongst themselves. Who will serve as President? Treasurer? Secretary?

"The first step in deciding who will fulfill each role is really to get to know each other. Try to understand the skills and experience each person brings to the role. Successful Boards are those who are tactful in their use of individual skills and experience," says Ashley, "If someone has experience with financials, like a CPA or a forensic accountant, then they may be well suited for the role of treasurer. Having the right people in the right role will go a long way in ensuring success as a Board."

Check out Sentry's 'Quick Start Guide'

Sentry Management has developed resources for community leadership to aid in 'getting up to speed.' The first resource immediately available is the *Quick Start Guide for New Board Members*. The guide provides an easy-to-understand snapshot of what it means to be a Board Member, definitions of the various roles on the Board, a list of traits of successful Board Members, understanding the relationship between the Board and Sentry Management, and a recommendation on the first seven steps for new members.

Ashley spoke about the following as it relates to the first seven steps: "One step outlined is the importance of reviewing the last year worth of minutes, and the most recent financial reports for the community. We provide this to the new board member. We also highly recommend an existing Board Member act as a mentor to the new member should they have any questions regarding the information. Of course, Sentry is always here to help as well."

The Quick Start Guide also introduces the new Board Member to additional resources, namely to an additional set of guides on topics like roles and responsibilities, vendor management, long-range planning, governing documents, and more. These guides are available for all Board Members in the information center located in the CommunityPro™ Portal provided by Sentry Management.

Tour the community from a new perspective

Many new Board Members are only familiar with their association from the homeowner's point of view. Often the inner workings of the association and its elements and amenities are not fully understood by homeowners. As a Board Member, it is imperative to be familiar with the intricacies of the community served. Ashley encouraged that "the new Board should set aside time to provide new members with a tour of the common elements from the Board perspective. This is often another learning curve for new Board Members, and one that will ensure they can make fully informed decisions in the best interest of the membership."

In some cases, the tour may include the Community Manager or Maintenance Supervisor and even an association vendor if necessary. While this is an essential step as a new Board Member, realize that it does not need to happen all at once. "It's a lot of information to absorb, so if they can break it up into several different days or times, it will prevent them from rushing through the important details," said Ashley.

Communicate frequently, stay involved, and ask questions!

"Many times, with a new Board Member, they become overwhelmed by everything they need to learn, and the immediateness of the need for actions and decisions to be made by the board," says Ashley, "And as long as they don't hold back or shy away, it will be okay!"

It is easy to get lost in the back and forth of emails, meetings, and demands of the community. A new Board Member should be prepared for this and understand that if they commit to communicating and staying involved, everything will be okay. Most importantly, new Board Members should not hesitate to ask questions of the existing Board Members and Sentry Management.

Board Members fill the role of an often-thankless job, but the work they do matters! The great thing about associations is that owners lead them with a vested interest in doing right by their community. New Board Members should remember to always place the community's needs above their own and be willing to listen and work with others. Lastly, the ability to remain calm

in the face of challenges and conflict – which arise more often than any of us would prefer – will serve any Board Member very well.

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Ashley has been with Sentry Management since 2011 and holds several professional designations. She has earned the CMCA® (Certified Manager of Community Associations) and AMS® (Association Management Specialist) credentials. She has years of experience in customer service and supervisory positions. In 2019 Ashley was promoted to the Division Vice President of the Tampa/Clearwater office of Sentry Management, Inc.



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