



# President's Checklist

## Understanding the Role

- Familiarize yourself with the HOA's bylaws related to the President's role.
- Understand the importance of leadership and community vision.
- Consider attending workshops, training, and other educational opportunities for ongoing improvement.

## Leadership and Vision

- Steer the board and committees toward common goals.
- Assign responsibilities to other board members or committees as needed.
- Make sure all parts of the board work harmoniously.
- Create opportunities for residents to share their thoughts and concerns.
- Take charge of board and membership meetings and set the agenda.
- Oversee day-to-day operations, including meeting with vendors and soliciting bids.

## Decision-Making and Conflict Resolution

- Craft agendas that address key community issues.
- Ensure important matters receive proper attention during meetings.
- Conduct meetings in an organized and effective manner.
- Make sure all members have the chance to speak and contribute.
- Navigate through disputes following community bylaws and legal requirements.

## Governance and Compliance

- Act ethically and transparently to build trust.
- Familiarize yourself with the community's governing documents.
- Be aware of applicable local, state, and federal laws.
- Oversee the consistent application of community rules and regulations.
- Make sure the community operates within legal bounds

## **Collaboration & Communication**

- Co-sign checks with the Treasurer or Secretary as necessary.
- Work with attorneys when legal advice is needed.
- Assist other board members in their duties.
- Actively participate in decision-making, sharing insights, and contributing ideas.

## **Efficiency Tips & Best Practices**

- Use collaboration tools to facilitate board discussions and document sharing.
- Uphold the highest standards of integrity and accountability.
- Promote transparency in all leadership actions and decisions.

**Revision History**

Version ID	Date of Change	Revision / Change Description
20230925.01	9/25/2023	Initial draft