



Secretary's Checklist

Understanding the Role

- Familiarize yourself with the HOA's bylaws related to the Secretary's role.
- Understand the importance of documentation and effective communication in community well-being.
- Consider attending workshops, training, and other educational opportunities for ongoing improvement.

Documentation and Record-Keeping for Historical Preservation

- Manage all incoming and outgoing correspondence within the board and with community members, vendors, or other stakeholders.
- Ensure current copies of the HOA's governing documents are available to members.
- Properly record any amendments to the governing documents.
- Maintain essential records, including meeting minutes, governing documents, correspondence, and other official HOA documents.

Meeting Coordination

- Send out notices for board and community meetings according to legal requirements and governing documents.
- Assist with or prepare the agenda for board and community meetings.
- Take detailed and accurate minutes of all board meetings.
- Ensure minutes are approved and signed.

Communication Facilitation

- Act as a liaison between board members, committees, and community members.
- Respond to community members' requests for information or documents in a timely manner.
- Sign official documents on behalf of the association as required.

Compliance Management

- File Statement of Information or Annual Statements with the Secretary of State.
- Oversee voting and election processes, ensuring compliance with governing documents.
- Ensure the association is in compliance with all statutory requirements related to secretarial functions.

Collaboration & Communication

- Co-sign checks with the President or Treasurer as needed.
- Assist other board members in fulfilling their responsibilities.
- Actively participate in the board's decision-making process, sharing insights and ideas.

Efficiency Tips & Best Practices

- Automate repetitive administrative tasks, like sending out meeting notices.
- Establish a secure digital filing system for easy retrieval of documents.
- Engage qualified professionals for specialized tasks such as legal advice.
- Utilize communication tools for more effective board and community interactions.
- Promote transparency in all official documents and communications.

Revision History

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