



# SUCCESSION PLANNING for Community Associations

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The success of a community association depends on the Board of Directors maintaining the financial health, governance, and overall well-being of the community. These dedicated volunteers often spend countless hours collaborating with the management team and subject matter experts to meet the community's needs. But what happens when a board member steps down due to health, family obligations, relocation, or simply choosing not to run again? Without a plan, there is a potential for gaps in leadership which will disrupt operations and potentially set back progress made.

Just as large corporations rely on succession planning to ensure continuity, community associations should adopt similar strategies. A well-designed succession plan minimizes delays, preserves institutional knowledge, and fosters trust within the community.

How to Build an Effective Succession Plan:  
The ABCs

## **A – Acknowledge the Need for Volunteers**

Boards should actively encourage homeowner involvement through committees. Committees provide an entry

point for owners to learn about governance and decision-making processes. This type of exposure builds interest and prepares future leaders for board service. It's important however not just to create and fill the committees. They should be given meaningful roles, and the Board should invest the time to ensure the ideas and suggestions the committees develop are given attention by the Board. Otherwise, the members agreeing to volunteer will quickly become disengaged and/or jaded.

## **B – Board Leadership Development Training and Education**

Education is essential for effective governance. The Community Associations Institute New Jersey Chapter (CAI NJ) offers a Board Leadership Development Training Course designed for current and prospective board members. This program covers essential topics such as governing documents, board obligations and organization, communications, financial management, professional and vendor relations, rules and regulations, due process and alternative dispute resolution (ADR), elections, and risk management. It also emphasizes legal and ethical responsibilities under

federal and state laws. Both new and experienced board members, as well as committee members, are strongly encouraged to complete this course. Learn more on the chapter's website: <https://cainj.org/bld/>. Best of all, the course is free for all CAHNJ Homeowner Leader Members!

### **C – Create and Communicate a Succession Plan**

Before completing the written succession plan, the board should evaluate how to communicate effectively and efficiently with residents. Requests for volunteers should be ongoing and aligned with the number of committees within the association. Personal outreach, such as one-on-one conversations between board/committee members and neighbors, can have a

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positive influence for joining a committee or attending a board meeting. The plan should also specify how information will be shared, such as through the association's website, newsletters, or board meetings. Establishing a clear, adaptable succession plan is



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essential to ensure smooth leadership transitions and maintain stability.

Succession planning is not just a best practice; it's a necessity for community associations. By acknowledging the need for volunteers, investing in leadership development, and creating a transparent plan, boards can prepare their communities and set the stage for success.

If you are interested in volunteering at your community, there is no time like the present to reach out to the board and see where you can assist. ■