



Board Member Updates Policy

OPERATIONS

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VERSION

1.0

EFFECTIVE

2025

REVIEWED

2025

POLICY

Barkan is committed to maintaining accurate, up-to-date records and secure access for all client association Board Members. Timely processing of Board Member changes ensures operational continuity, legal compliance, and appropriate access to association tools and resources. This policy outlines the procedures to be followed when there are changes to a community association's Board of Directors, including system updates, access changes, required documentation, and orientation support.

Required Actions Upon Board Member Change

1. Documentation Collection: Obtain the official Certificate of Election or meeting minutes indicating the new Board composition.
2. Confirm effective date of changes with the Board or association's legal counsel if necessary.
3. Update municipal entity (Registry of Deeds, DPOR, etc.) upon confirmation of change of Board.
4. System Updates: Update the association's board roster in all internal systems (e.g., management software, contact lists).
5. Ensure mailing addresses, phone numbers, and emails for each member are current.
6. Access Management: Revoke access for outgoing Board Members to all association platforms, including financial systems, email groups, and document portals.
 - a. Grant access for new Board Members with appropriate roles and permissions.
7. Banking and Financial Access: Coordinate with the bank to update signature cards reflecting current authorized signers.
8. Confirm removal of outgoing signers and addition of new authorized signers.



Board Training and Onboarding

1. Recommend a Board Orientation Session for new members within 30 days or provide CAI published documentation.
2. Offer direct training on accessing financial reports, board portals, community documents, and service request systems. User guides will be available with log in credentials however, Support does not provide live Board training.
3. Share contact information for key Barkan personnel and an overview of manager responsibilities.