



New Director Onboarding Checklist

Give every director the same starting point. Use this checklist to build a clear onboarding file for each newly elected or appointed director of a Florida condominium association.

Director: _____ Elected/appointed: _____ 90-day date: _____

01 Governing documents

- ☐ Declaration of condominium and all amendments
- ☐ Articles of incorporation and bylaws
- ☐ Rules, regulations, current policies, and resolutions

03 Contracts and projects

- ☐ Management agreement and major service contracts
- ☐ Milestone inspection and SIRS status
- ☐ Open projects, permits, repair deadlines, and claims

05 Education and certification

- ☐ Director certification and education records
- ☐ Required filing completed within 90 days of election
- ☐ Annual continuing education tracked and filed

02 Money and insurance

- ☐ Current adopted budget and latest financial report
- ☐ Reserve plan, SIRS, balances, and funding plan
- ☐ Insurance summary, deductibles, and renewal dates

04 How the board works

- ☐ Meeting notice, agenda, and voting procedures
- ☐ Board, officer, and manager authority limits
- ☐ Spending, signing, and emergency authority

06 People and access

- ☐ Community association manager and association attorney
- ☐ Engineer, reserve provider, insurance agent, and CPA
- ☐ Records portal, key vendors, and emergency contacts

Confirm current requirements with Florida DBPR and qualified association professionals.

DAY 1	DAY 30	DAY 60	DAY 90
Welcome file and records portal login	Building walk-through with the manager	Questions, follow-up, and assignments	Education and certification records filed

NOTES AND OPEN QUESTIONS