VIVO CONTROL

HOA & GATED · 14 PAGES

The HOA Board Guide to Modernizing Community Access Control

Written for board members — not property managers. Covers the approval process, budget framing, vendor selection, and resident communication plan for a successful platform transition.

14 pages · 12 min read · PDF

INTRODUCTION

Why This Guide Is for You, Not Your Property Manager

Most access control resources are written for property managers — the people who evaluate hardware, compare vendors, and manage the day-to-day operation of the system once it's installed. That's not your job as a board member, and this guide isn't going to ask you to become an expert in QR codes or video intercom specifications.

Your job is different: you're the one who has to approve the budget, answer to homeowners at the annual meeting, and make sure the decision was made properly — with due diligence, a fair process, and documentation that protects the board if anyone questions it later. That's a governance problem, not a technical one, and it deserves its own guide.

> **WHAT THIS GUIDE COVERS**
>
> Your role and fiduciary responsibilities in this decision, how to run a proper approval process, how to frame the cost for owners, what the board specifically should ask vendors (versus what your property manager should handle), a resident communication plan with sample language, and a checklist to bring to your next meeting.

If you also want the technical side — what to actually specify, how to compare vendors, or how to run an RFP — our Property Manager's Guide and RFP Template cover that in depth. This guide is the board-level companion to those.

GOVERNANCE BASICS

Understanding the Board's Role and Fiduciary Duty

Board members generally owe the association a fiduciary duty — a legal obligation to act in the community's best interest, exercise reasonable care, and avoid conflicts of interest. For a decision like access control, that duty shows up in a few concrete ways.

- **Due diligence.** The board should be able to show it considered more than one option and had a reasonable basis for its recommendation — not that it took the first vendor a board member happened to know.
- **Avoiding conflicts of interest.** If any board member has a personal or financial relationship with a vendor being considered, that relationship should be disclosed and that member should typically recuse themselves from the vote.
- **Following your governing documents.** Many CC&Rs and bylaws specify approval thresholds, competitive bidding requirements, or reserve fund rules for capital expenditures above a certain dollar amount — confirm these before you start, not after a vendor is already selected.
- **Documentation.** Meeting minutes should reflect that the board reviewed options, discussed cost, and voted properly. This record is what protects individual board members if a homeowner later challenges the decision.

This guide provides a general framework, not legal advice. Have your community's legal counsel confirm the specific approval requirements in your governing documents before proceeding.

STEP 1

Define the Problem and Document It

Before any vendor conversation happens, the board should have a written record of why this decision is even on the table. This protects the board's due diligence position and gives owners a clear, non-technical reason for the change when it's communicated later.

- **Document specific incidents or complaints** — unauthorized entry, lost key/fob events, guard cost increases, or resident complaints about visitor access, with approximate dates.
- **Note any relevant insurance or legal exposure** — has your insurance broker or legal counsel flagged access control as a liability concern? Get this in writing if so.
- **Identify who is raising the issue** — the property manager, a specific board member, or homeowner complaints — and record it in meeting minutes.
- **State the goal in plain language** — for example, "reduce unauthorized entry incidents and provide a reliable log of who accessed the property," not a technical specification.

> **WHY THIS STEP MATTERS MORE THAN IT SEEMS**
>
> A board that can point to a documented problem, not just a vendor's sales pitch, has a much stronger position if a homeowner later asks "why did we spend this money?" This single page of documentation is often the most valuable thing the board produces in the entire process.

STEP 2

The Approval Process — From Committee to Vote

Most communities follow some version of this path, though your governing documents may specify a different order or additional requirements — confirm before you begin.

1. **Assign or form a committee.** Many boards delegate initial research to a committee (sometimes including the property manager and one or two board members) to avoid consuming full board meeting time on vendor comparisons.
2. **Confirm your approval threshold.** Check your governing documents for any dollar amount above which a special assessment, membership vote, or reserve fund allocation requires more than a simple board vote.
3. **Request competitive proposals.** Even if not legally required, obtaining at least two to three vendor quotes strengthens the board's due diligence position significantly. Our RFP Template is built specifically for this step.
4. **Present findings to the full board.** The committee or property manager presents a summary — not a full technical proposal — focused on cost, recommendation, and rationale.
5. **Hold the vote and document it.** Record the vote count and the rationale in the minutes, not just the outcome.
6. **Notify homeowners per your governing documents,** if required, before finalizing a contract above a certain threshold.

STEP 3

Budget Framing — Presenting Cost to Owners

How the board frames the cost matters as much as the cost itself. The same dollar figure can sound reasonable or alarming depending on how it's presented.

- [x] **Break the cost into a per-unit or per-household number,** not just a total. "$45 per unit, one time" lands very differently than "$38,000" as a headline figure.
- [x] **Identify the funding source clearly** — reserve funds, a special assessment, or financing — and explain what that means for owners in practical terms.
- [x] **Compare the cost against what the community already spends** on guard labor, locksmith calls, or hardware maintenance. Our Total Cost of Your Current System worksheet is built specifically to produce this comparison number.
- [x] **Present the ongoing cost, not just the upfront cost.** Owners should understand there's typically a monthly or annual software cost in addition to any one-time hardware and installation expense.
- [x] **Anchor the decision to the documented problem from Step 1,** not to a vendor's feature list — owners respond better to "this addresses the incidents we had" than to a list of software features.

STEP 4

Vendor Selection — The Board's Role vs. the Property Manager's Role

One of the most common sources of friction in this process is an unclear division of labor. Here's a reasonable default split — adjust based on your community's specific structure.

Task	Typically the Property Manager	Typically the Board
Technical requirements and RFP drafting	Yes	Reviews and approves scope
Requesting and comparing vendor quotes	Yes	Reviews finalist recommendations
Technical demos and site walkthroughs	Yes	Optional attendance
Contract terms and legal review	Drafts / negotiates	Approves and signs
Budget approval and funding source	Recommends	Approves
Homeowner communication	Drafts materials	Approves messaging, board signs official notices

The board's core job is oversight and approval, not technical evaluation — trying to do the property manager's job usually slows the process down without improving the outcome.

STEP 4, CONTINUED

Governance-Level Questions the Board Should Ask

These are different from the technical questions in our RFP Template — they're specifically the questions a board should confirm before signing, regardless of which vendor is chosen.

1. Does the vendor carry liability insurance, and can they provide a certificate naming the association as an additional insured?
2. What is the contract term, and what happens if the association wants to exit early?
3. Is there a warranty on hardware and installation, and for how long?
4. Who is liable if the system fails and a security incident occurs — is this addressed in the contract?
5. Does the contract require board approval for any future price increases, or are they automatic?
6. Is there a clause addressing what happens to community data (access logs, video) if the association terminates the contract?

RECOMMENDATION

Have these six questions answered in writing, as part of the contract or an attached exhibit, before the board votes to sign — not as a verbal assurance during a sales call.

STEP 5

The Resident Communication Plan — Timeline

Even a well-chosen system can generate unnecessary owner pushback if the communication is rushed or unclear. A staged communication plan reduces surprise and complaints.

Timing	Communication
After board approval, before installation is scheduled	Initial announcement — what's changing, why, and the high-level timeline
2–3 weeks before installation begins	Detailed notice — installation dates, expected disruption, and what residents need to do (if anything)
1 week before installation begins	Reminder notice, plus contact information for questions
Day installation begins	On-site signage and/or a same-day reminder notice
After installation, before old system is deactivated	Instructions for activating new credentials, with a support contact
2–4 weeks after full rollout	Follow-up notice confirming the transition is complete, with feedback channel

STEP 5, CONTINUED

Sample Announcement Letter and FAQ

SAMPLE ANNOUNCEMENT LETTER OPENING

"The Board of Directors has approved an upgrade to our community's access control system, effective [DATE]. This decision follows a review of our current system's cost and reliability, and a competitive evaluation of available vendors. The new system will [BRIEF, PLAIN-LANGUAGE BENEFIT — e.g., 'allow residents to manage guest access from their phone and provide a reliable record of who enters the property']."

Sample FAQ Questions to Include

- [x] Why is the community making this change?
- [x] What will change for me as a resident, day to day?
- [x] Will I need a new device, app, or credential? How do I get it?
- [x] What happens to my current key/fob — when does it stop working?
- [x] How much did this cost, and how is it being funded?
- [x] Who do I contact with questions or issues during the transition?

MANAGING PUSHBACK

Common Owner Objections, and How to Respond

1. **"Why are we spending money on this?"**
   Point back to the documented problem from Step 1 and the cost comparison from Step 3 — this is the moment that documentation pays off.

2. **"I don't want to use a smartphone app for this."**
   Confirm with your vendor whether a physical credential option remains available for residents who prefer it — many modern platforms support both.

3. **"How do we know this vendor is legitimate?"**
   Reference the competitive evaluation process and the reference customers checked — this is exactly what Step 2's documentation protects the board on.

4. **"Why wasn't I consulted before this decision?"**
   Clarify the board's legal authority to approve operational and capital decisions within its governing documents, while acknowledging the communication timeline going forward.

BEFORE YOU SIGN

Legal and Fiduciary Considerations

- **Have community legal counsel review the vendor contract** before signing, particularly the liability, insurance, and termination clauses.
- **Confirm competitive bidding requirements** in your governing documents — some communities require a minimum number of quotes above a certain dollar threshold.
- **Check your reserve study** if funding this from reserves, to confirm the expenditure is appropriately categorized and doesn't create a funding shortfall elsewhere.
- **Document board member recusals** if any member has a personal or financial connection to a vendor under consideration.
- **Confirm notice requirements** — many governing documents require advance written notice to owners before certain capital expenditures or special assessments.
- **Keep the full paper trail** — RFP responses, meeting minutes, vote records, and the signed contract — in the association's permanent records, not just a board member's personal files.

This is general guidance, not legal advice specific to your association or jurisdiction. Confirm all of the above with your community's legal counsel.

BRING THIS TO YOUR NEXT MEETING

Board Meeting Checklist

- [x] Documented problem statement and supporting incidents (Step 1)
- [x] Confirmed approval threshold and process per governing documents (Step 2)
- [x] At least two to three competitive vendor quotes on file (Step 2)
- [x] Per-unit cost breakdown and funding source identified (Step 3)
- [x] The six governance-level contract questions answered in writing (Step 4)
- [x] Resident communication plan drafted, with sample letter and FAQ ready (Step 5)
- [x] Legal counsel review of the contract completed (before signing)
- [x] Meeting minutes prepared to document the vote and rationale

TYPICAL OVERALL TIMELINE

From initial committee formation to signed contract, most communities complete this process in 6 to 12 weeks — longer if governing documents require a membership vote or extended notice periods. Building in that time upfront avoids rushed decisions later.

VIVO CONTROL

Ready to Bring This to Your Board?

Vivo Control's team regularly presents directly to HOA boards — technical Q&A, cost breakdowns, and reference customers included. We can support your committee's evaluation process from the first meeting through installation.

Book a Free Demo →

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