THRIVE
COMMUNITY MANAGEMENT

ARIZONA BOARD LEADERSHIP SERIES

IS YOUR HOA MANAGEMENT COMPANY ACTUALLY PERFORMING?

The Arizona HOA Board’s Management Accountability & Performance Scorecard

A practical framework for evaluating financial oversight, communication, vendor performance, governance support, and long-term community stewardship.

BOARD WORKBOOK / PRINT-FRIENDLY EDITION

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INTRODUCTION

A Better Question Than “Are We Satisfied?”

Effective HOA management should be measurable—not simply familiar.

A management company may respond promptly to routine requests while leaving larger questions unanswered: Are financial risks identified early? Are vendor results documented? Does the Board receive useful recommendations, or only reports? And is the association better positioned for the years ahead?

This scorecard helps Arizona HOA Boards assess management performance across six areas. It is designed for a structured Board discussion, not as a substitute for reviewing the management agreement, governing documents, or professional advice.

How to use this scorecard

Rate each statement from 1 (rarely demonstrated) to 5 (consistently demonstrated). Use documented examples whenever possible. If an item is outside the management company’s contracted scope, mark it N/A and exclude it from the average.

WHAT STRONG PERFORMANCE LOOKS LIKE

Reliable service matters. So do financial visibility, sound escalation procedures, documented follow-through, and proactive guidance that helps the Board make informed decisions.

ASSOCIATION / REVIEW DETAILS

Association: _____

Review period: _____ Review date: _____

Management company: _____

DIMENSION 01

Financial Oversight & Transparency

Does the Board receive information it can actually use to govern?

Monthly reporting is only the starting point. Effective financial management helps directors understand variances, cash position, delinquencies, reserve contributions, and upcoming obligations—not merely whether statements were delivered.

BOARD EVALUATION

	1	2	3	4	5
Financial reports are accurate, timely, and understandable.	○	○	○	○	○
Material budget variances are explained with context and proposed actions.	○	○	○	○	○
Delinquencies, cash flow, and reserve transfers are tracked consistently.	○	○	○	○	○
The Board is alerted to emerging financial concerns before they become urgent.	○	○	○	○	○
Management supports informed annual budgeting and financial planning.	○	○	○	○	○

ARIZONA BOARD PERSPECTIVE

Ask whether financial reporting reflects the actual operating costs of an Arizona community, including irrigation, landscaping, pool operations, and climate-related asset maintenance.

BOARD NOTES / EVIDENCE

DIMENSION 02

Communication & Follow-Through

Responsiveness is valuable. Resolution and accountability matter more.

A high-performing management team makes it clear who owns an issue, what happens next, and when the Board can expect an update. Communication should reduce confusion for both directors and homeowners.

BOARD EVALUATION

	1	2	3	4	5
Board inquiries receive timely, substantive responses.	○	○	○	○	○
Action items have clear owners, deadlines, and status updates.	○	○	○	○	○
Homeowner concerns are documented and routed appropriately.	○	○	○	○	○
Sensitive issues are communicated professionally and consistently.	○	○	○	○	○
Meeting materials and follow-up summaries support timely decisions.	○	○	○	○	○

QUESTIONS WORTH ASKING

How many open issues have remained unresolved for more than 30 days? Are delays explained? Can the Board easily distinguish a pending response from a completed resolution?

BOARD NOTES / EVIDENCE

DIMENSION 03

Vendor & Maintenance Accountability

Are service providers being managed—or merely paid?

Vendor oversight requires more than invoice processing. Boards should expect documented scopes of work, appropriate competitive review, performance follow-up, and early identification of recurring maintenance concerns.

BOARD EVALUATION

	1	2	3	4	5
Vendor scopes, pricing, and service expectations are clearly documented.	○	○	○	○	○
Work quality and unresolved deficiencies are actively followed up.	○	○	○	○	○
Bids and recommendations provide a useful basis for Board decisions.	○	○	○	○	○
Preventive maintenance is scheduled and tracked where applicable.	○	○	○	○	○
The Board is informed of recurring failures and replacement risks.	○	○	○	○	○

ARIZONA BOARD PERSPECTIVE

Heat, monsoon weather, irrigation demands, and landscape conditions can accelerate maintenance needs. Ask how management distinguishes routine service issues from emerging capital risks.

BOARD NOTES / EVIDENCE

DIMENSION 04

Governance & Compliance Support

Does management help the Board operate with consistency and clarity?

Management supports governance by maintaining reliable records, helping coordinate meetings, tracking Board decisions, and identifying matters that may require counsel. Legal interpretation remains the role of qualified attorneys.

BOARD EVALUATION

	1	2	3	4	5
Meeting preparation and recordkeeping are organized and reliable.	○	○	○	○	○
Board decisions and assigned responsibilities are documented.	○	○	○	○	○
Policies and enforcement processes are applied consistently.	○	○	○	○	○
Management flags issues that may require legal or specialist review.	○	○	○	○	○
Directors receive clear orientation to processes and responsibilities.	○	○	○	○	○

ARIZONA LEGAL CONTEXT

Arizona planned communities and condominium associations are governed by different statutes, including A.R.S. Titles 33, Chapters 16 and 9. Evaluation should account for the association type, governing documents, and management agreement.

BOARD NOTES / EVIDENCE

DIMENSION 05

Reserve & Capital Planning Support

Is the association preparing for costs it can already anticipate?

A reserve study is useful only when its assumptions inform actual decisions. Management should help the Board coordinate relevant information, track scheduled projects, and recognize when updated technical or financial analysis is needed.

BOARD EVALUATION

	1	2	3	4	5
Reserve study recommendations are reviewed during budget planning.	○	○	○	○	○
Major component replacement timelines are visible to the Board.	○	○	○	○	○
Emerging infrastructure issues are escalated with supporting evidence.	○	○	○	○	○
Capital project planning includes scope, timing, and funding considerations.	○	○	○	○	○
Management helps coordinate updates with qualified reserve professionals.	○	○	○	○	○

ARIZONA BOARD PERSPECTIVE

Pay particular attention to pavement, roofing, pools, irrigation, perimeter walls, and other components exposed to desert conditions. The appropriate priorities depend on the association’s actual assets.

BOARD NOTES / EVIDENCE

DIMENSION 06

Strategic Partnership & Board Confidence

Is management helping the community make better decisions?

The strongest management relationships combine dependable operations with informed recommendations. Boards should receive context, alternatives, and clearly explained tradeoffs—while retaining responsibility for decisions within their authority.

BOARD EVALUATION

	1	2	3	4	5
Recommendations explain options, tradeoffs, and potential consequences.	○	○	○	○	○
Management identifies recurring problems and proposes improvements.	○	○	○	○	○
The Board has clear visibility into priorities for the next 6–12 months.	○	○	○	○	○
Management provides continuity when directors or vendors change.	○	○	○	○	○
The relationship builds Board capability rather than dependence.	○	○	○	○	○

A USEFUL TEST

If the management company changed tomorrow, would the Board have a complete record of open issues, vendor obligations, financial priorities, and upcoming decisions?

BOARD NOTES / EVIDENCE

SCORING WORKSHEET

Turn Observations Into a Board Discussion

Score performance by dimension, then identify the issues that deserve action.

PERFORMANCE AREA	SCORE / 25
Financial oversight & transparency	____ / 25
Communication & follow-through	____ / 25
Vendor & maintenance accountability	____ / 25
Governance & compliance support	____ / 25
Reserve & capital planning support	____ / 25
Strategic partnership & Board confidence	____ / 25
TOTAL SCORE	**____ / 150**

Interpretation: Rather than relying on a universal pass/fail threshold, look for consistently low-scoring dimensions, gaps between directors' ratings, and areas where documented evidence is missing. The score reflects Board observations—not an independent audit.

THREE PRIORITIES FOR IMPROVEMENT

ACTION PLAN

From Performance Review to Measurable Progress

A scorecard is most valuable when it leads to clearer expectations and follow-through.

Within 30 days

Share the findings with management, confirm which concerns fall within the existing contract, and request a written response to the highest-priority issues.

Within 60 days

Agree on specific deliverables, responsible parties, reporting cadence, and reasonable completion dates. Separate service gaps from matters requiring additional Board approval or funding.

Within 90 days

Review documented progress. Determine whether performance is improving, whether expectations or the scope of services need adjustment, and what the Board should evaluate next.

THRIVE BOARD INSIGHT

The purpose of a performance review is not to create conflict. It is to replace vague dissatisfaction with evidence, shared expectations, and a measurable path forward.

BOARD DECISION / NEXT REVIEW DATE

CLOSING PERSPECTIVE

A Stronger Community Starts With Clearer Accountability

HOA management should do more than keep daily operations moving. It should provide the financial visibility, operational discipline, and informed guidance that help Boards protect the association’s resources and plan responsibly for the future.

Whether your Arizona association is evaluating an existing management relationship or considering a transition, a structured review can clarify what is working, what needs attention, and what the community should expect next.

EXPLORE A MORE PROACTIVE MANAGEMENT PARTNERSHIP

Thrive Community Management supports Arizona HOA Boards through financial oversight, vendor coordination, Board support, community transitions, and long-term operational planning.

THRIVE COMMUNITY MANAGEMENT

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Educational notice: This resource is intended for Board discussion and general educational use. It is not a legal, financial, or professional performance audit. Review the management agreement, applicable Arizona law, and governing documents; consult qualified advisers when necessary.