

MOTION CARRIED

The professional back office behind independent HOA boards.

BOARD OPERATIONS & COMMUNITY COMMUNICATIONS

We organize the work, document the decisions, keep residents informed, and carry unfinished business forward.

We carry it from there.

wearemotioncarried.com



Portfolio samples use Desert Loom, a fictional association.

A professional operating layer for self-managed boards.

The Board stays in control. Motion Carried creates the structure around the work.

POSITIONING

Professional board operations + community communications support for independently managed HOAs.
For boards that want the structure of professional management without giving up control of their community.

Arizona launch

75–500 homes

ORGANIZE

Agendas, calendars, trackers, project structure

DOCUMENT

Packets, minutes, decisions, institutional memory

COMMUNICATE

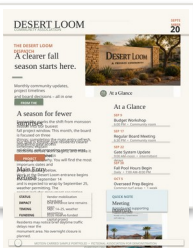
Newsletters, notices, FAQs, difficult messages

FOLLOW THROUGH

Owners, deadlines, carry-forward, next steps

Six ways the work shows up.

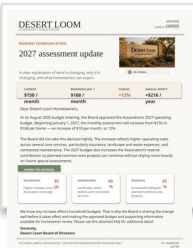
Each sample solves a different piece of the board’s administrative and communications burden.



01

Community Newsletter

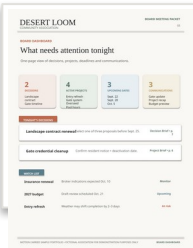
Resident-first updates that make projects and decisions easier to understand.



02

Difficult Communication

One sensitive decision translated consistently across every channel.



03

Board Meeting Packet

A complete administrative backbone around the monthly meeting cycle.



04

Action + Project Tracker

A live command center so open work does not disappear between meetings.



05

Vendor Decision Brief

Messy proposals normalized into one board-ready comparison.



06

Annual Planning Calendar

The year planned before contracts, budgets and communications become urgent.

Visual styles shown are fictional-client sample styles—not locked Motion Carried brand standards.

Community Newsletter

Clear, useful communication that treats residents like adults—not like an audience to placate.

DESERT LOOM
COMMUNITY ASSOCIATION

SEPT
MBER
20

THE DESERT LOOM
DISPATCH

A clearer fall
season starts here.

Monthly community updates,
project timelines
and board decisions – all in one

FROM THE

A season for fewer
sunburns

Summer marks the shift from monsoon
season into our busiest
fall project window. This month, the board
is focused on three
things: completing the main entry refresh,
improving gate access
timelines, explain
reliability before work begins, and more it
reliability before work begins, and more it

PROJECT
Timeline

Why. You will find the most
important dates and
Main Entry
Refresh

Work at the Desert Loom entrance begins
on September 14
and is expected to wrap by September 25,
weather permitting. The
project includes monument resurfacing,
chained

STATUS	Vendor mobilization
IMPACT	Chained
TIMING	OPEN 14–25, weather
FUNDING	2026 reserve-funded

Residents may notice brief daytime traffic
delays near the
monument area. No overnight closure is
planned.

At a Glance

SEP 9
Budget Workshop
6:00 PM • Community room

SEP 17
Regular Board Meeting
6:30 PM • Community room

SEP 22
Gate System Update
9:00 AM–noon • intermittent
delays
SEP 28

Fall Pool Hours Begin
Daily • 7:00 AM–8:00 PM

OCT 5
Overseed Prep Begins
Common turf areas • 1 week

QUICK NOTE

Meeting
materials

QUICK ANSWERS

Ask the Board

QUICK ANSWERS

Ask the Board

DESERT LOOM
COMMUNITY ASSOCIATION

SEPT
MBER
20

LANDSCAPE +
WATER

Fall overseed
begins

October 5

Turf will be scalped and
prepared for winter rye
during the week of October 5.
Residents should expect
temporary closures of visible streets
during prep and
increased temperatures
if temperatures shift slightly
during the week.

Desert landscape high native
planting beds are
not part of the overseed work.

One last seasonal
check

The landscape contractor is
completing a final common-area
monsoon cleanup this month,
including branch removal and
tree maintenance.

COMING
NEXT
Fall planning
timeline

R

update • entry refresh •
budget workshop

OCTOBER

Overseed • fall landscape work •
draft budget review

NOVEMBER

2027 budget communication •
holiday schedule

DECEMBER

Year-end project recap • annual
calendar preview

COMMUNITY
COURTESY

Help keep project
days smoother

During scheduled vendor work, please avoid
beside posted work zones and keep pets
clear of active
equipment. Temporary

QUICK
ANSWERS

Ask the Board

Where can I find project

Major updates are posted in the resident portal

How do I send a question to

Email board@desertloom.example. Include your

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WHAT IT SHOWS

Information
hierarchy

Important dates, decisions and project
impacts are easy to scan.

Resident tone

Warm and clear without becoming
corporate, defensive or patronizing.

Visual
storytelling

Community photography makes the
communication feel lived-in and local.

Useful repetition

Key information appears where residents
are most likely to look for it.

Communications Desk

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Asset 01 • Community Newsletter

A 12% assessment increase explained once—then adapted consistently across every resident channel.

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FICTIONAL SAMPLE ASSOCIATION • CREATED FOR DEMONSTRATION PURPOSES ONLY

05 • BOARD TALKING

- **Resident letter / email**
- Resident FAQ
- Portal / email short version
- SMS / text versions
- Board talking points

Sensitive comms

Board Meeting Packet

The monthly meeting becomes an operating system instead of a pile of attachments.



DESERT LOOM
COMMUNITY ASSOCIATION

Regular Board Meeting Packet

SEPTEMBER 17, 2026 • 6:30 PM
Community Room • Desert Loom

THIS PACKET INCLUDES

- Agenda • Board dashboard • Action tracker
- Financial snapshot • Project brief • Decision brief
- Communications • Follow-through

Prepared as a Motion Carried sample • Fictional association • For demonstration purposes only

DESERT LOOM
COMMUNITY ASSOCIATION

BOARD MEETING PACKET 03

BOARD DASHBOARD

What needs attention tonight

One-page view of decisions, projects, deadlines and communications.

2 DECISIONS
Landscape contract
Gate timeline

4 ACTIVE PROJECTS
Entry refresh
Gate system
Overseas
Pool hours

3 UPCOMING DATES
Sept. 22
Sept. 28
Oct. 5

3 COMMUNICATIONS
Gate update
Project recap
Budget preview

TONIGHT'S DECISIONS

Landscape contract renewalSelect one of three proposals before Sept. 25. Decision Brief • p. 7

Gate credential cleanup Confirm resident notice • deactivation date. Project Brief • p. 6

WATCH LIST

Insurance renewal	Broker indications expected Oct. 10	Monitor
2027 budget	Draft review scheduled Oct. 21	Upcoming
Entry refresh	Weather may shift completion by 2-3 days	At risk

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BOARD DASHBOARD

DESERT LOOM
COMMUNITY ASSOCIATION

BOARD MEETING PACKET 04

ACTION TRACKER

Nothing disappears between meetings

Open work is assigned, dated and carried forward until it is complete.

ACTION	OWNER	DUE	STATUS	NEXT STEP
Finalize entry monument paint schedule	R. Patel	Sept. 19	IN PROGRESS	Confirm vendor
Send gate update to residents	L. Chen	Sept. 20	OPEN	Board approval
Deactivate inactive gate credentials	Vendor	Sept. 22	SCHEDULED	Run report
Compare landscape proposals	Board	Sept. 17	DECISION	Vote tonight
Publish fall pool-hours notice	M. Ortiz	Sept. 25	OPEN	Draft message
Confirm overseas signage plan	Landscape	Sept. 30	OPEN	Site map
Prepare 2027 budget workshop packet	Treasurer	Oct. 15	UPCOMING	Gather inputs
Review insurance renewal indications	President	Oct. 10	UPCOMING	Broker call

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ACTION TRACKER

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COMMUNITY ASSOCIATION

BOARD MEETING PACKET 05

PROJECT BRIEF

Gate system credential cleanup

A single page that separates project status, resident impact and the decision the Board actually needs to make.

STATUS

Testing complete • Implementation scheduled

WHY
Remove inactive credentials and restore vendor-supported

WHE
System update: Sept. 22 • 9:00 AM-noon.

INPA
Brief entry delays possible; no hardware replacement.

COST
\$4,850 approved operating expense.



DECISION REQUIRED

Confirm whether credentials inactive for 18+ months will be deactivated on Sept. 22, with a 30-day reactivation window for affected owners.

RESIDENT

Sept. 18	Advance notice	What is changing • who may be affected
Sept. 22	Day of update	Short reminder • possible entry delays
Sept. 23	Completion notice	Testing complete • help contact

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PROJECT BRIEF

PACKET FLOW

Agenda

↓

Dashboard

↓

Actions

↓

Financials

↓

Project brief

↓

Decision brief

↓

Follow-through

This is the clearest visual proof of the Fractional Board Office: prepare the meeting, support the decision, assign the work, communicate the result, carry the rest forward.

Board Action + Project Tracker

A working command center—not a static deliverable.

	A	B	C	D	E	F	G	H
1	DESERT LOOM BOARD COMMAND CENTER							
2	Motion Carried sample portfolio • Action + Project Tracker • Fictional association							
3	Snapshot Date		September 4, 2026					
4	OPEN ACTIONS		OVERDUE		DUE NEXT 14 DAYS		DECISIONS PENDING	
5	11		0		4		2	
6								
7								
8								
9	ACTIVE PROJECTS							
10	Project	Status	Target	Budget	Forecast	Variance	Comm	Next Milestone
11	Main Entry Refresh	On Track	09/25/2026	\$24,500	\$23,800	-\$700	Sent	Vendor mobilization
12	Gate System Cleanup	On Track	09/23/2026	\$4,850	\$4,850	\$0	Draft	Resident advance notice
13	Fall Overseed	Planning	10/12/2026	\$12,600	\$12,600	\$0	Scheduled	Confirm signage plan
14	Fall Pool Hours	On Track	04/30/2027	\$0	\$0	\$0	Draft	Publish new hours
15	Insurance Renewal	At Risk	11/01/2026	\$92,000	\$101,500	\$9,500	Awaiting Approval	Receive renewal indications
16	2027 Budget	Planning	11/15/2026	\$0	\$0	\$0	Draft	Budget workshop packet
17	Landscape Contract Renewal	Planning	10/31/2026	\$85,000	\$85,440	\$440	Draft	Select vendor
18								
19	NEXT BOARD ATTENTION				COMMUNICATIONS QUEUE			
20	Item	Due	Status	Next Step	Communication	Send Date	Status	Approval
21	Deactivate inactive gate credentials	09/22/2026	Scheduled	Run final inactive-credential report	Gate credential cleanup — advance notice	09/18/2026	Draft	Awaiting Approval
22	Finalize entry monument paint schedule	09/19/2026	In Progress	Confirm vendor mobilization	Fall pool hours notice	09/25/2026	Draft	Draft
23	Confirm Q4 newsletter calendar	09/12/2026	Open	Confirm Oct-Dec themes	Entry refresh progress update	09/21/2026	Scheduled	Approved
24	Request updated tree-work proposal	09/10/2026	Waiting	Follow up with vendor	Overseed preparation notice	10/01/2026	Scheduled	Draft
25								
26								
27	This tracker demonstrates Motion Carried's operating philosophy: decisions are documented, actions are assigned, projects stay visible, and resident communications are tied to the work that created them.							

WORKBOOK STRUCTURE

Dashboard	Board command center
Action Tracker	Owner + due date + next step
Project Tracker	Milestones, budgets, risk
Decision Log	Institutional memory
Communications Queue	What residents need to hear

Nothing disappears between meetings.

Vendor Decision Brief

Motion Carried organizes the choice. The Board retains the decision.

DESERT LOOM
COMMUNITY ASSOCIATION

VENDOR DECISION BRIEF

01

EXECUTIVE DECISION SUMMARY

2027 Landscape Maintenance Contract

Three proposals normalized into one decision framework. Motion Carried organizes the facts; the Board makes the choice.

DECISION

Select a 12-month landscape maintenance provider for Jan. 1-Dec. 31, 2027 before the current contract expires October 31.

BUDGET RANGE

\$78K-\$86K / yr

TERM

12 months

DECISION BY

Sept. 25

CURRENT VENDOR

Contract expires Oct. 31

PROPOSAL SNAPSHOT

PROPOSAL A

\$82,200/yr

Strong service depth

Weekly irrigation checks

\$8K tree allowance

4-hour emergency response

PROPOSAL B

\$77,700/yr

Lowest annual cost

Biweekly irrigation checks

\$5K tree allowance

Non-day emergency response

PROPOSAL C

\$85,440/yr

Highest service level

3 visits per week

\$10K tree allowance

4-hour emergency response

BOARD FEEDS

SERVICE RELIABILITY

Weekly irrigation checks and emergency response matter because irrigation balances have driven recent resident complaints.

COST CONTROL

Proposal B saves \$4,500-\$7,740 annually, but excludes some services included elsewhere.

SCOPE CLARITY

The Board should compare inclusions/exclusions before treating monthly price as an apples-to-apples number.

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EXECUTIVE SUMMARY

DESERT LOOM
COMMUNITY ASSOCIATION

VENDOR DECISION BRIEF

02

NORMALIZED COMPARISON

Cost + scope side by side

Monthly price alone can hide exclusions. This page normalizes the proposals into comparable categories.

CRITERIA	PROPOSAL A	PROPOSAL B	PROPOSAL C
Monthly base fee	\$6,850	\$6,475	\$7,120
Annual base	\$82,200	\$77,700	\$85,440
Weekly service visits	2	2	3
Irrigation checks	Weekly	Biweekly	Weekly
Tree allowance	\$8,000	\$5,000	\$10,000
Overseed prep	Included	+\$3,200	Included
Emergency response	4 hours	Next day	4 hours
Palm trimming	Included	+\$2,400	Included
Seasonal color	2 changes	1 change	2 changes
References	3 HOA	2 HOA	4 HOA

ADJUSTED ANNUAL

Proposal A

\$82,200

Proposal B*

\$83,300

Proposal C

\$85,440

*Proposal B adjusted to include optional overseed prep and palm trimming for a more comparable annual estimate.

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COST + SCOPE

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VENDOR DECISION BRIEF

03

RISK REVIEW

What the Board should clarify before voting

A decision brief should make uncertainty visible—not bury it in proposal attachments.

RISK

AREA	PROPOSAL A	PROPOSAL B	PROPOSAL C
Scope completeness	LOW	MEDIUM	LOW
Emergency response	LOW	HIGH	LOW
Irrigation monitoring	LOW	MEDIUM	LOW
Budget predictability	LOW	MEDIUM	LOW
Reference depth	LOW	MEDIUM	LOW

OPEN

Proposal A

Does the unused tree allowance roll forward, or is it forfeited each year?

Proposal B

Confirm after-hours emergency response terms and whether palm trimming can be fixed-price.

Proposal C

Clarify termination language and whether the third weekly visit is year-round.

Open questions should be resolved before the vote whenever the answer could materially affect price, scope, or service reliability.

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RISK + QUESTIONS

DESERT LOOM
COMMUNITY ASSOCIATION

VENDOR DECISION BRIEF

04

EVALUATION FRAMEWORK

A transparent way to compare priorities

The Board can change the weights. Motion Carried makes the criteria explicit so the vote is easier to explain.

CRITERIA	WEIGHT	A	B	C
Cost	25%	4/5	5/5	3/5
Scope completeness	25%	5/5	3/5	5/5
Service reliability	20%	4/5	3/5	5/5
Emergency response	10%	5/5	2/5	5/5
Irrigation oversight	10%	5/5	3/5	5/5
Reference strength	10%	4/5	3/5	5/5

ILLUSTRATIVE WEIGHTED

PROPOSAL A

4.45 / 5

PROPOSAL B

3.40 / 5

PROPOSAL C

4.50 / 5

IMPORTANT

This scoring is an organizing tool—not a recommendation. The Board may use different priorities, ask for revised proposals, or select any option it determines is in the Association's best interest.

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EVALUATION FRAMEWORK

DECISION SUPPORT

Normalize

price + scope

Surface

exclusions + risk

Clarify

open questions

Weight

Board priorities

Record

motion + next steps

This is especially valuable for volunteer boards because it separates price from actual scope—and makes uncertainty visible before the vote.

MOTION CARRIED • PORTFOLIO

Asset 05 • Vendor Decision Brief

Annual Board Operations + Communications Calendar

The proactive layer: what should the Board be thinking about before it becomes urgent?



DESERT LOOM COMMUNITY ASSOCIATION

2027 Annual Board Operations + Communications Calendar

A proactive annual roadmap for governance, budgeting, contracts, projects, seasonal operations and resident communications.

Governance

Finance

Projects

Contracts

Communications

JAN	FEB	MAR	APR	MAY	JUN
Annual reset Board goals	Contracts Records	Spring projects Community update	Reserve review Summer prep	Pool + safety Project planning	Midyear review Monsoon prep
JUL	AUG	SEP	OCT	NOV	DEC
Budget inputs Insurance	Draft budget Vendor review	Budget workshop Fall projects	Budget finalize Renewals	Owner budget recap Hobby plan	Year-end recap 2028 CAWPSA

Illustrative planning framework only. Legal/statutory deadlines are confirmed by the Association or its qualified professional.

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YEAR AT A GLANCE

DESERT LOOM
COMMUNITY ASSOCIATION

ANNUAL OPERATIONS + COMMUNICATIONS

03

Q2 • APRIL-JUNE

Three months of board operations and communications planned before they become emergencies.

APRIL
PLAN EARLY

Finance

Projects

Contracts

Communications

Reserve funding + capital plan check

Summer project sequencing

Review pool / amenity vendor performance

Summer readiness notice

MAY
PLAN EARLY

Projects

Governance

Finance

Communications

Pool / amenity opening readiness

Midyear board calendar review

Prepare upcoming budget assumptions

Safety + amenity expectations

JUNE
PLAN EARLY

Projects

Finance

Contracts

Communications

Monsoon preparedness / drainage review

Midyear financial snapshot

Insurance/broker data collection

Monsoon preparation + emergency channels

QUARTER WATCH

Monsoon vendor readiness

Insurance data needs

Summer meeting attendance

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Q2

DESERT LOOM
COMMUNITY ASSOCIATION

ANNUAL OPERATIONS + COMMUNICATIONS

05

OCTOBER
PLAN EARLY

Finance

Contracts

Governance

Communications

Finalize proposed budget

Complete key renewal decisions

Confirm annual-meeting / election prep as applicable

Explain budget decisions before owner notice

NOVEMBER
PLAN EARLY

Finance

Projects

Contracts

Communications

Distribute approved budget information

Close out major annual projects

Confirm January vendor transitions

Assessment / budget FAQ + holiday schedule

DECEMBER
PLAN EARLY

Governance

Finance

Projects

Communications

Year-end action-item closeout

Confirm January billing/payment readiness

Create next-year capital/project roadmap

Year-end recap + next-year preview

QUARTER WATCH

Owner notice timing

New-year payment changes

Carry-forward action items

DESERT LOOM
COMMUNITY ASSOCIATION

ANNUAL OPERATIONS + COMMUNICATIONS

06

1 PREPARE

2 DECIDE

3 FOLLOW THROUGH

4 COMMUNICATE

DAY 1-5

DAY 6-10

MEETING WEEK

+1-3 DAYS

+1-5 DAYS

MONTH END

Board liaison check-in

Packet development

Board meeting

Follow-through

Resident communications

Proactive review

BOUNDARY

YEAR AT A GLANCE

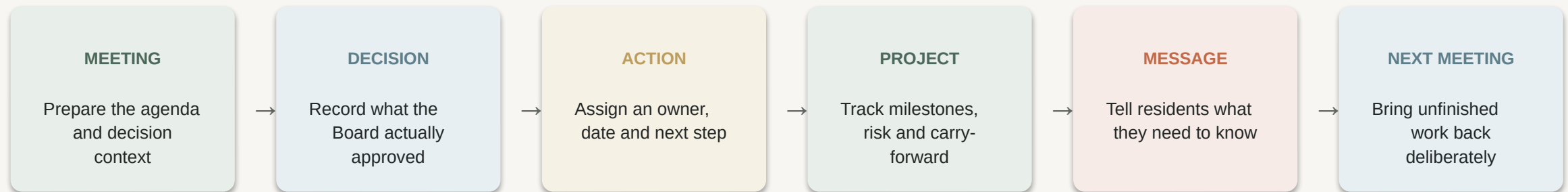
QUARTER PLANNING

YEAR-END CARRYOVER

MONTHLY RHYTHM

From motion to message—and decision to done.

The six samples are not separate products. They are different views of the same operating loop.

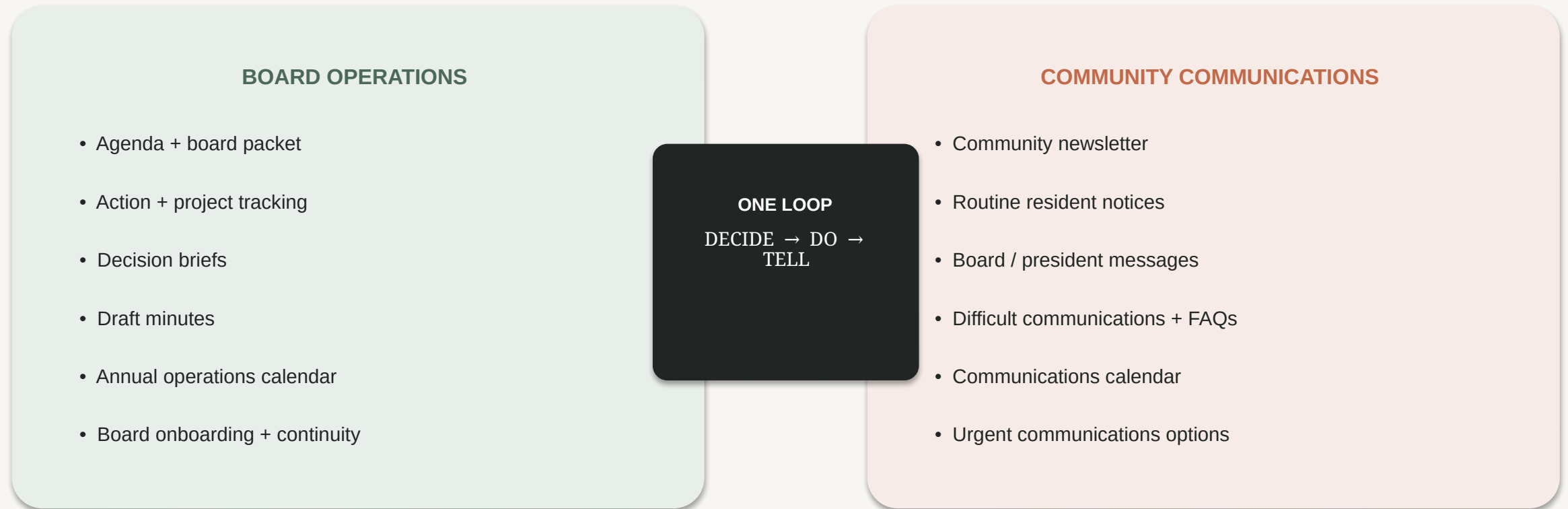


THE DIFFERENCE

Traditional board administration often stops at the meeting. Motion Carried connects what happened in the room to what must happen next.

The Fractional Board Office

One recurring back office that connects board operations and community communications.



Your board keeps control. We keep everything organized, documented, communicated and moving forward.

Professional support without full-service management.

The scope is intentionally designed around the parts of HOA work Motion Carried does best.

WE ORGANIZE, DOCUMENT, COMMUNICATE + FOLLOW THROUGH

- ✓ **Board meeting preparation**
- ✓ Action / project tracking
- ✓ Decision support
- ✓ Resident communications
- ✓ Document organization
- ✓ Calendar + continuity

WE DO NOT BECOME THE ASSOCIATION'S MANAGER

- Violation enforcement
- Collections / banking
- Property inspections
- Vendor supervision
- Legal / accounting advice
- 24/7 emergency response

The Board decides. The professionals advise. The vendors execute. Motion Carried organizes, documents, communicates, and follows through.

MOTION CARRIED

Your board made the decision. We carry it from there.

Board operations and community communications for independently managed HOAs.

THE PROFESSIONAL BACK OFFICE BEHIND THE BOARD.

wearemotioncarried.com



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