

EBOOK

The Complete
HOA Annual Meeting
Guide



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THE IMPACT OF ANNUAL MEETINGS

In a homeowners' association (HOA), regular board and membership meetings are essential to the community's operations. However, once a year, these meetings take on greater importance in the form of an annual meeting. Open to all residents and with a larger agenda of high-priority items, annual meetings are the time to give updates, address significant issues, and help set the community up for success in the year ahead.

Since 1991, CAMS - Community Association Management Services - has helped thousands of communities and board members plan and execute annual meetings. Read on to learn more about annual meetings, how to plan them, common pitfalls, and tips for hosting and increasing attendance.



ABOUT ANNUAL MEETINGS

Usually mandated by a community's governing documents, an annual meeting is a general meeting for HOA membership. These gatherings happen once a year and bring board members, management representatives, and residents together to discuss legal and functional matters.

Overall, annual meetings are a chance to:

- › Elect new board members
- › Vote on assessment issues
- › Approve budgets
- › Showcase the association's value
- › Update the membership on capital projects



HOW TO PLAN AN ANNUAL MEETING

Annual meetings are crucial events throughout the life of an association, and making the most of them takes careful planning. Most communities must meet certain requirements related to planning, timing, and size of the annual meeting. While you should check your governing documents for your association's guidelines, communities can typically pencil in a date for their annual meeting a year in advance and follow the below planning schedule leading up to it:

- **6-8 months out:** Review your governing documents for details about the time, date, and location. The documents should also specify how homeowners should be notified of the meeting, the election process, and quorum requirements.
- **60 days out:** Collaborate with your community manager to prepare the annual meeting notice and meeting materials. Develop an agenda that addresses hot topics, like upcoming projects, dues, and social events, and invite special guests, including vendors and contractors, to attend.
- **45 days out:** Distribute your annual meeting notice and agenda to attendees. Guarantee that the timing, delivery method, and format comply with local and state laws and governing documents.
- **5 days out:** Send an email reminder to all involved parties and prompt them to submit a proxy if they cannot attend. A proxy allows someone else to attend and vote on their behalf. Also, confirm details with special guests and meeting room reservations.
- **Meeting day:** Bring a sign-in sheet, extra copies of the agenda, ballots, and pens with you. Make introductions and welcome new homeowners to the community. Be focused and follow the agenda. If there's a lot to discuss, set a time frame so that all agenda items can be covered.



8 TIPS FOR HOSTING A SUCCESSFUL ANNUAL MEETING

Making the most out of your annual meeting is key to the association's success. Follow these eight tips to help your annual meeting live up to its full potential.

1. Be proactive about non-attendance.

The annual meeting cannot take place if quorum isn't met. To prevent this scenario, invite all residents to submit a written proxy. Proxies can be rescinded if the member ends up attending the meeting, but if not, their submission can take the place of attendance and allow a quorum to be established.

2. Make the meeting exciting.

Make your annual meeting something attendees can look forward to. Invite a special guest to speak, hold the meeting at a unique location, or provide food, drinks, and prizes, if your budget permits. These extras will create interest—and encourage participation and attendance.

3. Keep the meeting on task.

Keep each topic of discussion as brief as possible, and don't let the conversation stray from the agenda. These actions show that the board takes its role seriously and ensures homeowners stay engaged.

4. Present information clearly.

When presenting items, state the purpose of what you're explaining, the community's goals related to that item, and the desired or current results. Attendees won't always understand HOA-related language, so avoid overusing jargon and try to present in a simple and clear manner.



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8 TIPS FOR HOSTING A SUCCESSFUL ANNUAL MEETING

5. Involve homeowners.

Make homeowners feel valued. The decisions made at the annual meeting will affect them directly, so their input should be respected. Acknowledge this from the moment they walk in by greeting and mingling with residents before the meeting begins. As you move through the agenda, give adequate time for input and questions.

6. Record and distribute meeting minutes.

Minutes are typically required at every HOA meeting—and they're even more critical during the annual meeting. As a legally binding record of meeting activities, make sure your annual meeting minutes accurately record all decisions. Then, check your governing documents for information about how to distribute them.

7. Highlight accomplishments.

Maintain a sense of positivity at your annual meeting and give attendees confidence in the future of the HOA. Do this by emphasizing your community's accomplishments over the past year, thanking volunteers, and teasing exciting projects and events.


8. Keep track of topics for future meetings.

It's unlikely you'll be able to address every question and concern that comes up during the annual meeting. To avoid losing track of topics, consider having a suggestion box for attendees to submit talking points that can be tackled in future meetings or communications.

VIRTUAL ANNUAL MEETINGS

As you've likely realized, virtual meetings are here to stay. And, though you may have mastered platforms like Zoom over the past few years, laws and best practices surrounding virtual meetings (especially annual meetings) for community associations continue to be updated. Here, we'll dive into the expectations surrounding virtual meetings, voting, and electronic ballots.

- › **Check Governing Documents:** Before you decide to conduct a virtual meeting, you should check your governing documents and applicable state statutes to be sure virtual meetings are allowed in your associations.
- › **Verify Identity of Everyone Attending Virtually:** You must also account for proxies and provide members with a reasonable opportunity to participate. What constitutes a "reasonable opportunity"? A general practice is to not go wild with the mute button or solely rely on the chat function. Zoom has a "raise your hand" function that will allow members to be called on when they have comments.
- › **Electronic Notice:** To receive electronic notice, members must have designated email addresses to conduct association-related business. You may also ask members to opt-in to electronic notices. Remember, if you use an opt-in option, you must also provide an opt-out option. Some associations use a hybrid method - those who want electronic notice can have it, and those who prefer mailed notices can be provided with those.
- › **When to Vote:** It is a best practice to conduct voting before or after a virtual meeting. If you don't have many candidates, voting after the meeting is the best option, as you can use the meeting itself to introduce candidates. If you choose to conduct the vote beforehand, send ballots along with the meeting notice and provide a deadline by which they must be returned. When voting before the meeting, it is a good idea to start the nomination process as early as possible so that results can be announced at the meeting.



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