

How casual can our HOA meeting be?

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A friend was recently elected president of his homeowner's association (HOA). The annual meeting has been run loosely, more like a social event than a business meeting. At choir rehearsal he asked me whether he should tighten things up a bit.

The next minute another singer said to me, "The biggest problem at my condominium meetings is that people don't want to be reminded of the rules. When I bring them up, they look at me crosswise and ask why I'm being so legalistic."

So how casual can your HOA or condominium meeting be? Well, there is a certain structure and standard of formality that you must have, lest "casual" should turn into "casualty." Here are our suggestions.

- 1) **State law governs** what you can and can't do, so be sure that your declaration (CCRs) and bylaws scrupulously follow the homeowner's association law in effect for your organization. A good attorney, and your management company, should be able to reassure you on this point.
- 2) **Consult with your board and with the management company** in preparing, so the responsibility is shared.
- 3) **Read your declaration (CCRs) and the bylaws** carefully beforehand. Follow their requirements in organizing the meeting. If your bylaws give Robert's Rules of Order as your parliamentary authority, review Robert's coverage of voting, teller's reports, etc. (*Robert's Rules of Order Newly Revised*, 11th edition, pp. 400-429).
- 4) **Give adequate notice.** Sending a written message to the members advising when and where the meeting will be held, enough in advance, is essential to ensure compliance with the law and make your meeting valid. It may be allowable to send notices by email, or perhaps a paper notice is required. Don't guess about this.



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- 5) **Make sure that a quorum is present.** A quorum is the minimum number of voting members who must be present for business to be done. Read our article [What is a quorum and why does it matter](#) to learn more. Many associations have a desk to sign in so that each member can sign the roster when they arrive at the meeting. This provides a record that a quorum was present and shows how many votes each member is entitled to.
 - 6) **Prepare an agenda.** This can be a simple list of what business will be considered in what order. Having a written plan makes things go much more smoothly. Here's our article on [agendas](#).
 - 7) If there are action items, such as an election, approving a budget, a change in assessment, amendments to the bylaws, or a new policy, think them through thoroughly and **provide written information**.
 - 8) If there are guests or non-members present, make sure that **only members who are entitled to vote do so**. Read your documents for any rules about proxy voting and be sure to follow them.
 - 9) Voice votes can be difficult because each member who is present may have a different number of votes, whether because of proxies or because each lot or unit has a different fractional vote. It may be easier to have a large colored index card to hold up when voting, with the number of votes printed in large numbers so it is legible from the back of the room. (The person running the sign-in desk is perfectly placed to provide the card with the correct number.)
 - 10) **Use ballots correctly.** Sarah Merkle, who publishes [The Law of Order blog](#), has great information on this.
 - 11) **Be scrupulous in announcing the results** of any votes. Take your time if necessary, take a re-vote if necessary, but be sure you're accurate. If your group is very informal, and doesn't really like to use motions and vote, the president needs to poll the voting members in some fashion to be able to state that consent for the action has been demonstrated. At the end of the discussion, the secretary should be able to write in the minutes what the action is, and that the group approved that action.
 - 12) Members want to feel that the board and leadership are listening to them. In addition to the action items, **include a member forum** when people can share their thoughts. Read Sarah's blog post, [The Secret Tip That Will Transform Your Property Owners Association Annual Meeting](#), to learn how to do this.
 - 13) While running the meeting, you want to be fair to all, and to appear to be fair. The best way to do this is to follow the rule that **no one may speak a second time until everyone who wishes to do so has spoken once**. Don't let people get into a back-and-forth conversation. You have to control the meeting to do this, and even to interrupt people if necessary.
 - 14) **Insist on courtesy and respect.** If someone starts to insult another person, or uses foul language, interrupt the individual and remind them firmly to be polite. [The Civility Pledge](#), published by the [Community Associations Institute](#), is a fine resource here.
 - 15) **Keep a written record (meeting minutes)** recording the decisions taken, and once approved, file it in your official record book. Read our article [What to include in meeting minutes?](#)

The emotional aspect of meetings is important. It's vital to be welcoming and inclusive, and to show that you care personally about the members. Their attitude and commitment towards the association will be colored by their feelings about the leadership, especially the president. A warm and friendly annual meeting helps people swallow the minimum procedure you need to protect your association.

At the same time, getting too casual and neglecting the steps listed above can lead to trouble down the line. These days people are ready to file lawsuits for just about anything, and you don't want to give them cause to do so. Read your authority documents, consult your attorney, and prepare ahead of time in order to have an effective annual meeting.

Here are more resources:

[Follow four fundamental guidelines for successful meetings](#)

[Essential guidelines for HOA and condominium boards](#)

As always, nothing in this article constitutes legal advice. For that, you want a qualified attorney. Two brilliant attorneys who are also professional parliamentarians are [Sarah Merkle](#), of Bradley Boulton Cummings, based in Alabama, and [Jim Slaughter](#), of Black Slaughter Black in North Carolina, who has published [Coronavirus: What Should Homeowner and Condominium Associations Do?](#) and [“Let's Have Our Meeting or Convention Online!”](#)

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