



**RealManage**

# Tips for Effective Board Elections

INCLUDES A SAMPLE ANNUAL MEETING AGENDA TEMPLATE





# Board Members and Officials Hold Important Roles in the Decision Making Process in HOA's.

FOLLOWING THE RULES AND BEST PRACTICES  
IS KEY TO ESTABLISHING STRONG LEADERS





# Follow the Rules

The most important thing to do in these elections is to follow the set provisions of your HOA's governing documents; which includes rules on how to setup meetings and the details of running these elections properly. These rules can vary from state to state, so it is important to remain updated on any changes that may have been made. In addition, following the stated rules is key in understanding how the election process works and the number of votes a member must win by in order to be elected.







# Send Out Proxy Forms

Send out proxy forms before the meeting with information on the election and the candidates running for the election. Also include the guidelines that members must follow in the election voting process. Sending out these forms before the meeting is a good way to ensure that members are involved in the election and that the meeting meets quorum.





# Check for a Quorum

Be sure to check the HOA's governing documents in order to know how many people must attend the annual meeting in order for the election to be able to proceed.



# Determine Qualifications

For full resident controlled boards, the HOA's governing documents should outline specific qualifications that a candidate must meet in order to be qualified to run for an officer or board position. Those guidelines typically included that the candidate must be cleared as a homeowner and member in good standing; which usually requires assessments to have been paid in a timely manner.





## Voting

After votes have been cast, they will be counted in an open meeting. Opening votes in an open official meeting assure members that the election process has been run honestly. Check your respective state guidelines and association covenants for specific information regarding the voting process for your community.

## Promptly Report Results

After the election ballots are counted, the results should be immediately reported to the board and attendees of the meeting. Check your respective state requirements for the timeline of when the overall results of the election should be published to the membership.

# Sample Annual Meeting Agenda

Annual Meeting of \_\_\_\_\_ Association

Date

Location of Meeting

## **I. Registration**

## **II. Call to Order**

## **III. Vote to Approve Prior Year's Meeting Minutes**

## **IV: Approve Tax Resolutions**

## **V. Reports**

- **Manager's Report**
- **Treasurer's Report** - Year End Financial Condition
- **President's Report** - Will cover what happened over the year, completion of projects, and the outlook for the upcoming year.

## **VI. Nominations**

## **VII. Close of Voting**

## **VIII. Homeowner/Open Forum**

During this forum homeowners are allowed a set duration of time in which to ask questions or make statements.

## **VIII Election Results**

## **X: Adjournment**

# Thank You

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