As the name suggests, an annual HOA (homeowners association) or COA (condominium owners association) meeting happens once a year and is open to all community members. Annual meetings allow boards to discuss major topics like completed projects, budgets, and new capital improvements. It is also the meeting where new board members are elected and, if your board oversees committees, where these committees present their reports.

During the annual meeting, the board has the attention of all the owners, so it is an opportunity to highlight and celebrate what the board, committees and staff have accomplished in the past year.

To ensure a successful meeting, board members must prepare communication pieces and agendas; however, some associations might not have the resources, expertise, or the time to execute that.

That is why partnering with the right property management company is essential to thriving communities.

FirstService Residential offers boards annual meeting assistance with knowledgeable property managers who can assist with:

» Meeting preparation and protocols
» Meeting coordination
» Pre- and post-meeting communication

We give boards like yours the resources, education, and support you need to host successful and engaging annual meetings.

Reference this checklist before your next annual meeting and use these best practices to improve your meeting prep and elevate your annual meetings from good to great.
ANNUAL MEETING
PREP

- Refer to your Governing Documents and State Statutes
  It is essential to understand the procedures and rules for conducting the annual meeting as stated in your community’s governing documents and state statutes. For example, some communities must hold their annual meeting by a specific date, so ensure that you have picked a suitable time frame for your meeting. The governing documents and state statutes may also stipulate resident communication deadlines and frequency, so it is crucial to refer to them and plan the annual meeting accordingly.

- Assess and Plan
  To host a successful meeting, board members should familiarize themselves with issues important to residents and be prepared to answer questions. That may mean gathering feedback through resident surveys, researching topics, speaking to experts and having these experts available at the meeting to provide further information to your homeowners.

- Work with Management
  An experienced professional property manager can help your board with the annual meeting prep, resident communication and follow-up, and meeting coordination. FirstService Residential offers solutions and support that can help your board host a successful annual meeting, whether it is an in-person or virtual event.

- Create an Agenda
  An agenda will help set a pace and lay out a road map for the meeting so board members can speak to specific projects, letting everyone be involved while keeping the meeting organized and on topic. It also lets residents know what to expect, especially if there are elections or discussion proposals. Agendas usually include:

1. Welcome/introduction of guests
2. Old Business/new business
3. Presentations
4. Announcements
5. Election/membership vote
   Many associations have seen an uptick in electronic voting, which allows the membership the flexibility of attending virtually if they must or prefer, making it easier for the association to meet quorum requirements and minimize the need for proxy voting.
6. Reports (including annual budget)
7. Open forum discussion/resident feedback
Choose a Convenient Location
Choosing a convenient venue for homeowners will lead to better attendance rates. Keep in mind, in some states, like Florida, associations are required by law to conduct their annual meeting in close proximity to the property. The timing of the meeting is equally important. You want to make sure that your annual meeting is scheduled for a time when the majority of your membership can attend. Online meetings may be a good option for associations as they are easily accessible. If your board wants to host a virtual annual meeting, make sure that you have all the equipment, the right platform, and all your tech for managing the discussion and voting squared away. Remember: always test your technology prior to starting the meeting.

Communicate Early and Frequently
Generating interest and getting a good turnout requires planning and an effective communication strategy. Notices should list the date, time, location, and the meeting agenda. Make sure to refer to your governing documents and state statute, and consult your association attorney to make sure you adhere to notice requirements for both in-person and virtual annual meetings. Getting the word out early about the annual meeting gives residents more opportunities to attend and participate in the community’s decision-making.

Communicate Using Effective Channels
There are many ways for board members to communicate with residents, so choosing the most effective communication channels is critical. The more diverse the communication plan, the more likely your board will engage more of the membership. Some channels to consider are direct mail, email, newsletters, signs, bulletin boards, etc. Again, refer to your governing documents and state statutes as they may dictate where meeting notices must be posted, such as the community website.

Meet Quorum Requirements
Being knowledgeable about quorum requirements for your meetings is critical. If the minimum number of board members or association membership cannot be present, the board is unable to conduct business (in fact, if a quorum of the board is not attained, association business cannot be conducted and there cannot be a meeting). Ultimately, the members in attendance will not be able to elect new members or approve an annual budget.

Voting by Proxy
Ensure that your residents know how to use proxy ballots to vote and approve new business if they can’t be present. The association should have a plan for collecting, tracking and recording proxy votes. Many associations assign this task to association counsel or designated election monitors. The key is that it be an impartial party. It’s important to note, in the state of Florida, condo associations cannot vote by proxy for board member elections. To preserve the integrity of the election, your association should also consult with association counsel and follow state statutes and administrative regulations as these relate to proxy votes.
☐ **Provide Additional Information**  
Using residents to ask questions directly to vendors and city officials helps with transparency and building trust. It also allows residents to get answers from key sources.

☐ **Engage Residents**  
Small gestures go a long way in improving participation and engagement. Most associations have trouble meeting quorum requirements around member attendance. Meetings during dinnertime can be made less tedious with snacks and considerations like children’s activities so that residents can attend and be present. Another way to increase participation is to pair the annual meeting with a community event like parking or amenity pass renewal.

As North America’s property management leader, FirstService Residential can help your board host successful and effective annual meetings. Our team provides guidance on best practices and delivering exceptional service, with the experience and expertise to help drive your association’s success.

For more information about all the ways FirstService Residential provides your board with the resources and solutions it needs, contact us today.