



Your Timeline for Planning a Successful Annual Meeting

MICHELLE BOECK ([HTTPS://HUB.ASSOCIAONLINE.COM/AUTHORS/MICHELLE-BOECK](https://hub.associaonline.com/authors/michelle-boeck))



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According to a recent poll from **Cities Management** (<https://www.associaonline.com/locations/cities-management>)'s Facebook page, 71 percent of voters prefer to hold an **annual meeting** (<https://hub.associaonline.com/board-member/how-to-solve-the-biggest-problem-with-annual-meetings>) at the beginning of the year. This makes sense because the year-end financial statements from the previous year will be shared, and most often homeowners want to see these in the first quarter. Regardless of when the annual meeting occurs, there should be ample time set aside to adequately prepare and plan for this community event. Planning will help ensure the annual meeting is a successful one!

Whether you're about to plan for your meeting or you just hosted it, below is a guide that will explain what your board should do, and at what time, so that you'll be as prepared as possible every year.

60 Days Out: Read through the governing documents for the annual meeting requirements. These may include specific instructions about the time, date and location of the meeting. The documents should also reference the way homeowners should be notified of the meeting. Typically, associations are required to mail the annual meeting notice to all homeowners 21 to 30 days in advance of the meeting. Another component to review is the annual election process. Specifically, the documents should outline the terms of office, the manner of voting and the procedure for nominations. Finally, the mandatory quorum should be reviewed. Quorum represents the minimum number of members required to be present (via attendance or proxy) to conduct a valid meeting.

45 Days Out: Talk about the upcoming meeting! Board members should work closely with their community manager to discuss and prepare the annual meeting notice and meeting materials. Think about the homeowners in your community and develop an agenda that addresses hot topics like upcoming projects, dues and social events. Invite special guests like the lawn and/or snow vendor, insurance agent or contractor.

30 Days Out: Reserve the meeting location. The location should be reasonably close to the community and easily accessible. If **annual meeting attendance** (<https://hub.associaonline.com/ebooks/7-clever-ideas-for-annual-meeting-participation>) has been an issue, consider offering a door prize or refreshments to homeowners. The finalized meeting packet should be distributed to homeowners.

5 Days Out: Send out an email reminder to the community and prompt them to submit a proxy if they cannot attend. Confirm details with special guests and meeting room reservations.

Meeting Day: Community managers should print out and bring a sign-in sheet, extra copies of the agenda, ballots and extra pens. Board members should encourage homeowners to attend. Make introductions and welcome new homeowners to the community. Be focused and follow the agenda. If there is a lot to discuss within the homeowner forum, set a time frame so that all agenda items can be covered.

As a board member, pat yourself on the back for all the hard work and effort you've put into serving the community; you deserve it! Then, take a deep breath and enjoy the annual meeting.

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About the Author

Michelle Boeck, CMCA®, AMS®, PCAM®, began as a community manager at [Cities Management](https://www.associaonline.com/locations/cities-management) in 2008. In her current role as the human resource and training manager, she oversees the HR department, manager training program and board training events at Cities Management as well as serving as the wellness ambassador. Michelle has a Bachelor's of Science Degree in Hospitality and Tourism with a minor in Property Management from the University of Wisconsin Stout.



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