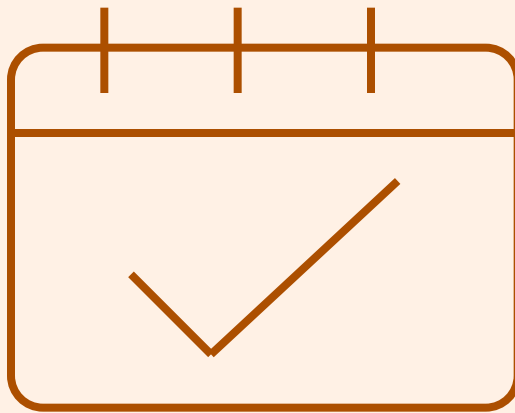


Board meetings and elections: a preparation workbook

Prepare the decision, not just the calendar invitation. Organize agendas, notice research, packets, participation, vote records, minutes, and follow-through around your association's applicable rules.



A PRACTICAL GUIDE + WORKSHEET

HOA, POA, and condo boards planning meetings and votes

Identify the kind of meeting and decision

An ordinary board meeting, a membership meeting, an election, and a committee discussion may have different rules. Write down what the association wants to decide and who has authority to decide it. If owners must vote, a board motion may not be enough. If the board can act, owners may still have attendance or participation rights.

Locate the current statutes, declaration, bylaws, election rules, and any adopted meeting policy. The Texas State Law Library shows how one state addresses board openness, executive sessions, minutes, and particular actions. Use it as an example of questions to investigate, not as a deadline schedule for another state or a different association type.

Build a decision-ready packet

For each proposed decision, state the question, available options, cost or operational impact, supporting documents, and who will present it. Separate information-only updates from motions or approvals. Members should be able to understand why an item is on the agenda without searching weeks of email.

Keep private legal, personnel, and owner information in the appropriate restricted process. A confidential label does not itself create legal authority to close a meeting. Confirm executive-session grounds and record requirements with the applicable source. Arrange accessible participation and an appropriate accommodation process rather than assuming one technical format suits every person.

Design the election process before nominations open

Research eligibility, nominations, ballot method, notice, quorum, proxies, counting, challenges, and retention. Record the source of each requirement and which person owns the step. Distinguish a survey of preferences from a legally effective election. An online tool's capabilities do not determine what the association is permitted to do.

Prepare a neutral explanation of how members participate and where questions go. Protect ballot and voter information as required, and avoid changing rules midway through a contested process without professional advice. Use a calendar built from verified requirements, not a generic national checklist with invented universal dates.

Close the loop after the meeting

Minutes and an action list serve different purposes. Minutes document the meeting and actions in the form required by the association's rules; an action list assigns follow-up work. Keep the record accurate and follow the appropriate review, approval, availability, and retention process. Avoid recording unnecessary personal detail.

Before leaving, repeat each approved action, responsible person, and next check-in. Send a concise resident summary where appropriate, while preserving the official record. If a decision cannot be made because information or authority is missing, record the next research step rather than imply that discussion amounted to approval.

A repeatable working process

- 01 Write the decision question and verify which body has authority.
- 02 Research notice, participation, voting, and record rules for that specific proceeding.
- 03 Prepare a packet with options, impacts, supporting evidence, and restricted material separated.
- 04 Run the meeting or election under the confirmed process and preserve the appropriate records.
- 05 Assign approved actions and review progress at the next scheduled check-in.

A worked example

Illustrative agenda item: "Choose a contractor for the approved fence repair." The packet includes a common scope, comparable proposals, funding information, and conflict disclosures. If a bid changes during discussion, the board identifies the change and whether it has enough information to decide. The secretary records the actual authorized action; the maintenance lead separately tracks the next steps.

Adapt the example to your documents, approved authority, service scope, and local requirements.

Make the plan your own

Use this writing space with your team. Keep private owner information and account secrets in an appropriately restricted system.

Decision / authorized body / governing source

Notice or election step / requirement / verified source

Agenda item / evidence / presenter

Motion or outcome / record location / follow-up

Action owner / next step / check-in date

Before you call it complete

- ☐ Meeting type and authority confirmed
- ☐ Notice requirements sourced
- ☐ Decision packet complete
- ☐ Private material handled appropriately
- ☐ Participation and accommodations planned
- ☐ Election rules verified before use
- ☐ Official record preserved
- ☐ Follow-up owners and dates assigned

Keep the evidence with the plan

Original EasyHOA editorial guide, edition 1.0. Published and sources consulted October 29, 2026. The workflows, fictional examples, and worksheets are our own; the sources below provide background and jurisdiction-specific reference material.

Texas State Law Library: meetings and voting

Texas-specific meeting and voting research. Other states and association types differ.

<https://guides.sll.texas.gov/property-owners-associations/meetings-voting>

Minnesota Department of Commerce: rights and responsibilities

A state-specific example of board and owner roles; Minnesota rules do not automatically apply elsewhere.

<https://mn.gov/commerce/consumer/realestate/cic/rights-responsibilities.jsp>

Illinois Department of Human Rights: association accommodation issues

Discusses disability-related accommodation issues for condominium and cooperative associations.

<https://dhr.illinois.gov/compliance/real-estate-and-housing/real-estate/reasonable-accommodations-and-modifications-guide/section-8-issues-unique-to-certain-housing-providers.html>

Use the right professional for the question

This is general educational planning material, not legal, accounting, tax, engineering, or safety advice. State law, recorded documents, contracts, and association type can change the right process. Confirm legal and technical requirements with qualified advisers. Worksheets are not legal forms.

Choose one process to improve

Name an owner, agree on a next step, and review the result at your next working session. Preserve the sources and decisions so the next board can continue the work.

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