

EBOOK

# HOA Board Elections

How to Get it Right

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## INTRODUCTION

Good leadership is key in any organization, including homeowners' associations (HOAs). Comprised of volunteer residents elected by fellow neighbors, an HOA board leads the community, carrying out rules and bylaws, among many other roles. Because of this, board elections are vital to the success of an association.

CAMS has years of experience helping boards hold elections. Read this ebook to learn more about the HOA election process, why it matters, tips for conducting a smooth election, and more.

## ABOUT HOA ELECTIONS

HOA elections occur when it's time to elect the board of directors. An association's governing documents, the set of documents that explain how the association is run, should detail when that happens.

Typically, elections are held once a year at an annual meeting, and members of the community vote for who they think the new board of directors should be, including the president, vice president, secretary, and treasurer.



## WHY HOA ELECTIONS MATTER

Elections are an essential event because they designate who will lead the HOA and set it up for a strong future. An elected board of directors has the legal obligation to fulfill a fiduciary duty, which means they should always act in the best interest of the entire community.

All community association members should carefully consider each vote and place their support behind individuals they think will best serve the association in this capacity.



## HOA ELECTION PROCESS

The HOA election process varies by community. They are usually set up as non-profit corporations, and local and state laws will outline the rules of operation for the association's specific voting procedures.

Likewise, further details of this process can be found in the governing documents. However, most elections will follow a process where:

- › Announcements and other notifications of an upcoming election are given.
- › The election is organized according to the HOA's rules.
- › The election is carried out, votes are tallied, and winners are determined. This usually happens at the annual meeting; however, it could also be done through the mail or electronically and take several weeks.
- › The election is closed, and new directors and officers take on their roles.





## BOARD TIPS FOR A SUCCESSFUL HOA ELECTION

- › **Follow your governing documents and laws.** Your HOA's governing documents and local and state laws will provide information and guidelines about hosting a board election. Read documents thoroughly and research applicable election laws and restrictions and confirm compliance. As always, consult the association's attorney for clarification if needed.
- › **Ask all homeowners to complete written proxies.** Because not every resident will be able to attend an election, those who can't should complete and return a proxy form. A proxy is an authorization that allows one person to appoint another (the proxy holder) to vote on their behalf. Proxies can be rescinded if the member attends the meeting, but their proxy can be used to meet a quorum if they don't make it.
- › **Maintain transparency.** Board members should maintain regular contact with residents regarding upcoming elections, procedures, candidates, and open positions. When community members are made aware of key dates, guided through the next steps, and informed about opportunities, they're more likely to participate or even run for a position.
- › **Establish an election committee.** Often a mandatory committee, an election or nominating committee plays an integral part in guaranteeing qualified and willing candidates are available for election to vacant positions, can help establish a plan to meet quorum, and educate residents about the importance of voting.
- › **Have a board transition plan.** A transition plan is necessary so new leaders can find everything they need to maintain operations, continue projects, and stay on track with goals. The transition plan should summarize the previous board's work and current state and have agenda logs, financial statements, budgets, calendars, manager reports, and more.



## HOMEOWNER BONUS CHECKLIST

### 6 To-Dos Before Running for an HOA Board Position

Becoming a board member is an exciting and rewarding opportunity. While you may be eager to add your name to your community's next election ballot, here are a few things you should do first:

- › **Learn about community issues.** Residents elect you to make decisions on their behalf, so it's crucial to be informed about what matters most to them. Familiarize yourself with the issues the board is dealing with by attending meetings and reaching out to your manager, board, or management company.
- › **Read your governing documents.** Within them, you'll find details about hosting a board election, election procedures, and candidate eligibility requirements.
- › **Know what the role entails.** Every HOA board member plays a different part in keeping the association running smoothly. Understand what you'd be expected to do and confirm you can deliver on these duties.
- › **Get to know people.** Because residents elect board members, they need to know who you are. Develop personal relationships and let people know you're running for the board. Demonstrate how you'd be an ideal community representative.
- › **Follow nomination procedures.** Grasp nomination procedures and follow them closely. Standard nomination methods include a traditional nomination, self-nomination, floor nomination, or write-in candidate.
- › **Encourage the community to vote.** Spread the word about your elections in the weeks leading up to it. Make sure residents know when and how to vote and work to generate excitement.



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