

# Community Association Legal Tips

## Three Steps for Effective Annual Meetings: *Planning, Meeting, and Post-Meeting*

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### 1. PLANNING

- A** As far in advance as possible (preferably immediately after last annual meeting)
- Set date (must comply with Bylaws)
  - Reserve meeting space (and tables, chairs, audio-visual equipment, podium and microphone)
  - Give date to Association attorney
  - Put notice of date in ALL newsletters
- B** Six Months Ahead
- Have Board of Directors start considering “Ground Rules” to be mailed out with notices
  - Begin preparation of Notice Package (Notice, Proxy, Agenda, candidate information and “Ground Rules”)
  - Form nominating committee to interview and propose slate of candidates
- C** Three Months Ahead
- Finalize Notice Package and send to attorney for review
  - Finalize proposed slate of candidates for director
  - Finalize “Ground Rules”
  - Begin preparation of Membership Lists
  - Send out Notice Packages per Bylaws
  - Draft reminder notice for Newsletter
  - Arrange caterer / refreshments
  - Arrange for off-duty policeman / security
- D** Month of Meeting
- Update Membership lists and delinquencies
  - Prepare “check in” package
  - Line up volunteers to assist with “check in”
  - Finalize President’s script and meet with President
  - Confirm everything

### 2. MEETING

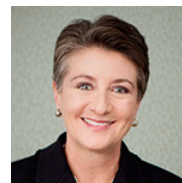
- Check-in tables with volunteers and Membership lists with check-in sheets
- Greeter(s)
- Trouble-shooter(s)
- Room/Chair arrangements
- Refreshments
- Test audio-visual equipment and microphones
- Security
- Voting: ballot collectors and counters (calculators and tally sheets for vote counters)
- Copies of Agendas and “Ground Rules”
- Minutes

### 3. POST MEETING

- Prepare Minutes
- New Board Meeting / Orientation
- New Signature Cards
- Elect Officers
- Start planning for next year

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*Liz is Sands Anderson's Community Associations Team Leader and a recognized national leader in community association law.*

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