

Tick-Tock: Exploring Your HOA Meeting Minutes

July 9, 2019



Over the past 40 years, Associa community managers have attended countless board meetings and reviewed many homeowner's association (HOA) meeting minutes. In this blog, we explore what HOA meeting minutes are, their purpose, and best practices for taking and keeping good HOA minutes.

What are HOA meeting minutes?

HOA meeting minutes are an official record of the actions taken by board members at a board meeting. Meeting minutes should be brief, objective, and reflect the actions taken at a meeting—not a complete transcript of what was said and opinions that were expressed.

What should be included in the HOA meeting minutes?

If the board secretary isn't taking minutes, he or she must appoint a recorder or assistant secretary to do so. The following are required to be recorded in HOA meeting minutes:

- Association name and meeting type (monthly, annual, special, etc.)
- Meeting location and date
- Time the meeting was called to order and adjourned
- Present and absent board members and their office positions
- Approval of prior minutes
- Officer and committee member reports
- New business that was discussed and open discussions
- All motions (whether or not they were approved) and actions that were taken
- Names of those who voted for a motion, dissented and abstained
- All financial transactions (reserve expenses, opening or closing of a bank account, etc.)

Make sure to check your local and state laws, as different states may have additional rules regarding taking and keeping HOA meeting minutes.

Do meeting minutes have to be approved?

Yes. In fact, approving board meeting minutes is one of the most important actions taken at a meeting. During each board meeting where quorum is met, all board members must approve the minutes from the previous meeting. After approved, the secretary must sign the minutes to make them official.

Who can access and view HOA meeting minutes?

Board members and residents aren't the only people who read or have access to meeting minutes. Recently, new residents, realtors, bankers, and mortgage companies have been requesting access to minutes to reference for sales transactions. Keep in mind that minutes are the legal record of the association and play a key role in financial business, so it's important to make sure they're accurate and acceptable for others to view.

How can I take good HOA minutes?

The first step to taking good minutes is to hold a good meeting. If there's an agenda and all board members have a solid understanding of how to run a successful meeting, it'll be easier for the secretary, recorder, or assistant secretary to stay focused and take good minutes. The following are some additional tips for taking good minutes:

- Take attendance
- Be brief and concise
- Limit minutes to about two pages
- Be objective
- Ask for clarification if needed
- **Use a template (<http://go.associaonline.com/protocols>)**
- Prepare minutes as soon as possible after the meeting .

Why is it important to take good HOA meeting minutes?

It's essential to take good minutes because they're a legal document of the association and can be used in a court of law. When taking minutes, ask yourself if you'd be comfortable reading them in court and ensure they accurately explain why an action was taken.

Should minutes be taken at all HOA board meetings?

Yes, minutes are required by law to be taken at all official board meetings. However, if a meeting doesn't meet quorum, it isn't official, and no minutes should be taken. Be sure to note all missed or canceled meetings in the minute book for future records.

How long should HOA meeting minutes be kept?

Because HOA meeting minutes are the official record of the association, they should be retained indefinitely. However, official laws for keeping HOA meeting minutes (both in print and digitally) do vary by association and state.

Want more tips for running successful HOA meetings? Check out our post, "**Done by Dinner: How to Conduct a (Meaningful) Board Meeting in Under an Hour** (<https://hub.associaonline.com/blog/done-by-dinner-how-to-conduct-a-meaningful-board-meeting-in-under-an-hour-with-downloadable-templates>)" and download your very own **meeting minutes template** (<http://go.associaonline.com/protocols>).

Download ebook!
(http://hub.associaonline.com/board-member-s-guide-to-running-better-meetings)

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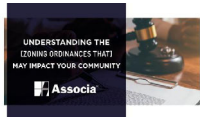
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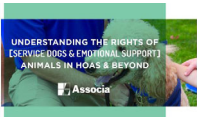
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