ProActive
PROPERTY MANAGEMENT

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Presented by
ProActive Property Management

PRACTICAL GUIDANCE FOR FLORIDA COMMUNITY ASSOCIATION BOARD MEMBERS



WELCOME TO THE BOARD BRIEF

Community association board members are volunteers asked to make increasingly complex decisions involving finances, buildings, insurance, contracts, legislation and, of course, people.

We created The Board Brief to make that job a little easier.

Each month, we'll share practical information that Florida board members can actually use—without overwhelming you with industry jargon.

Future editions will cover topics including:

- Insurance
- Reserves
- Florida Legislation
- Hurricane Preparedness
- Vendor Management
- Financial Controls
- Board Governance
- Capital Projects
- Annual Meetings

We hope you'll keep the issues that are useful, share them with your fellow board members and let us know when there's a topic you'd like us to address.

A NOTE FROM EDMUND

Hello,

Annual meetings are one of those times when the quality of an association's management can become particularly visible.

When the process is organized, owners may barely notice everything happening behind the scenes. When it isn't, even a small issue can quickly become the focus of the meeting.

That's why good preparation matters. If your board is preparing for its annual meeting and has questions about the process, I'd be happy to be a resource or simply provide a second perspective.
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ABOUT PROACTIVE

Professional management. ProActive approach.

ProActive Property Management provides professional community association management services to condominium, homeowners' and cooperative associations throughout the Tampa Bay area.

Have a management question?
Scan the QR code to connect with Edmund or learn more about ProActive.

Click below to request a proposal.

ANNUAL MEETING SEASON IS COMING

A little preparation now can prevent a lot of problems later.

For many Florida community associations, the beginning of the year means annual meetings, board elections and new directors taking office.

Annual meetings can appear straightforward: send the notice, hold the meeting, count the votes and announce the new board. In reality, a successful annual meeting starts **weeks—or even months—before anyone enters the meeting room.**

Notice deadlines, candidate requirements, voting procedures, proxies, owner records and governing documents all need to be considered.

Here are five things boards should be thinking about now.

1 START WITH YOUR GOVERNING DOCUMENTS

Before establishing the annual meeting timeline, review the association's bylaws and other governing documents.
Confirm:

- **When the annual meeting must occur**
- **How many board seats are up for election**
- **Length of director terms**
- **Quorum requirements**
- **Voting and proxy provisions**
- **Any association-specific election procedures**

Florida law provides the framework, but your association's governing documents remain an important part of planning the meeting.

2 BUILD THE TIMELINE BACKWARD

Don't begin with the first notice.
Begin with the **annual meeting** date and work backward to identify every deadline.
For Florida residential condominiums, the election process includes several important statutory milestones:

60 DAYS
First notice of election must be provided at least 60 days before the scheduled election.

40 DAYS
Candidate notices of intent are due at least 40 days before the election.

35 DAYS
Candidate information sheets must be furnished by candidates at least 35 days before the election if they want them included.

14–34 DAYS
The second election notice and ballot are provided during this window before the election.

3 CONFIRM YOUR OWNER RECORDS EARLY

Annual meeting preparation is a good time to review:

- **Owner names and mailing addresses**
- **Electronic-notice authorizations**
- **Voting certificates, if applicable**
- **Ownership changes**
- **Eligible voting interests**
- **Association roster**

Finding a problem three days before the meeting is considerably harder than finding it 60 days beforehand.

4 UNDERSTAND HOW THE ELECTION WILL WORK

The board and management should know well in advance:

- **Who is eligible to vote?**
- **How will ballots be received?**
- **Who verifies outer envelopes?**
- **Who counts the ballots?**
- **When does voting close?**
- **How will results be announced?**
- **What happens if there are fewer candidates than open seats?**

These shouldn't be questions answered for the first time on annual-meeting night.

5 PREPARE FOR THE MEETING— NOT JUST THE ELECTION

The election is only one component of the annual meeting.

Prepare the agenda, sign-in process, proxies when applicable, reports, ballots, meeting materials, room setup and responsibilities of everyone assisting with the meeting.

A well-organized meeting builds owner confidence.

THE TAKEAWAY

The best annual meetings often look simple to the owners attending them. That's usually because considerable preparation happened behind the scenes.

BOARDROOM CHECKLIST

Annual Meeting & Election Preparation

60+ DAYS OUT

- [ ] Confirm annual meeting date, time and location
- [ ] Review bylaws and governing documents
- [ ] Determine which board seats are expiring
- [ ] Confirm director term lengths
- [ ] Establish complete meeting and election timeline
- [ ] Review owner roster and mailing addresses
- [ ] Review electronic-notice authorizations
- [ ] Confirm voting certificates, if applicable
- [ ] Determine quorum requirement
- [ ] Review proxy requirements
- [ ] Confirm election procedures applicable to your association
- [ ] For applicable condominium elections, prepare and timely provide the first election notice

40–60 DAYS OUT

- [ ] Track candidate notices
- [ ] Verify candidate eligibility
- [ ] Track candidate information sheets when applicable
- [ ] Begin preparing annual meeting agenda
- [ ] Identify any membership votes requiring additional materials
- [ ] Confirm meeting venue and technology
- [ ] Establish responsibilities for management, board members and other meeting personnel

14–34 DAYS OUT

- [ ] Prepare required second notice/election materials, when applicable
- [ ] Verify candidate names and materials
- [ ] Prepare ballots and envelopes
- [ ] Prepare proxies when applicable
- [ ] Verify mailing list one final time
- [ ] Complete required mailing/delivery
- [ ] Complete required property posting
- [ ] Complete applicable website/portal posting
- [ ] Maintain evidence of required notices

BEFORE MEETING DAY

- [ ] Prepare sign-in sheets
- [ ] Prepare eligible voter list
- [ ] Organize received ballots securely
- [ ] Review proxies when applicable
- [ ] Establish ballot-counting procedures
- [ ] Prepare meeting agenda and scripts
- [ ] Confirm quorum calculation
- [ ] Prepare board/management reports
- [ ] Confirm room layout, microphones and virtual-meeting technology
- [ ] Establish owner-comment procedures
- [ ] Prepare materials for organizational meeting, if applicable

AFTER THE MEETING

- [ ] Announce and document election results
- [ ] Prepare meeting minutes
- [ ] Update board/officer information
- [ ] Complete new-director requirements
- [ ] Update bank and financial authorizations as necessary
- [ ] Update association vendors and professionals
- [ ] Maintain election materials and meeting records as required



ONE FINAL QUESTION

Could someone unfamiliar with your association pick up your annual-meeting file today and understand every remaining deadline between now and meeting day?

If not, your association probably needs a better annual-meeting timeline.

SAVE THIS PAGE
Keep this checklist with your association's annual-meeting materials.

CONDO OR HOA? Know the Difference

Florida condominium and homeowners' association elections do not follow identical procedures. Understanding which requirements apply to your association is an important first step.

FLORIDA CONDOMINIUMS

For residential condominiums, Florida law establishes a detailed board-election process, including the notice and candidate deadlines outlined on page 2.

Proxies generally cannot be used to elect condominium directors.

There is no quorum requirement for the condominium election itself; however, at least **20% of eligible voters must cast a ballot** for the election to be valid.

FLORIDA HOAS

HOA elections work differently.
Florida law provides that HOA director elections are conducted according to the association's governing documents.

An election generally isn't required unless more candidates are nominated than there are vacancies.

Unless otherwise provided by law or the governing documents, HOA members may generally vote in person or by proxy. The governing documents can also significantly affect nomination and election procedures.

For membership meetings, Florida's HOA statute generally requires at least 14 days' actual notice when the bylaws do not establish another procedure.

WHY THIS MATTERS

A process that's correct for a condominium may not be correct for an HOA—and vice versa.

Don't reuse last year's packet simply because it worked last year.

Quorum, election participation and the vote needed to approve a membership action can be different requirements—determine each one separately.

Before beginning annual-meeting preparation, review the current statutes, governing documents and association-specific circumstances.



FROM THE MANAGER'S DESK

Work Backward From Meeting Day

Put the meeting date on a calendar and work backward.

Identify every statutory and document-based deadline. Then establish an internal deadline several days ahead of each one.

That buffer provides time to address an ownership change, incorrect address, candidate question or mailing issue without jeopardizing the overall timeline. Annual meetings become stressful when everything is treated as a deadline.

They become much easier when they're treated as a process.
ProActive Property Management

NEXT MONTH

YEAR-END BOARD CHECKLIST

November's Board Brief will look at the items boards should have in order before heading into 2027—from financial and administrative housekeeping to contracts, projects and board priorities.

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