

HOA Meeting Checklist -- Idaho

Annual Meetings · Board Meetings · Quorum · Minutes

Use this checklist for every HOA meeting in Idaho. This reflects Idaho Homeowner's Association Act, Idaho Code Title 55, Chapter 32, particularly §55-3204. where it applies -- always verify against your governing documents, which may set a stricter rule. This is a governance aid, not legal advice.

PHASE 1 - BEFORE THE MEETING

DETERMINE MEETING TYPE

- | | |
|--|--|
| ☐ Annual / membership meeting | ☐ Regular board meeting |
| ☐ Special membership meeting | ☐ Special board meeting |

REVIEW GOVERNING DOCUMENTS

- | | |
|---|--|
| ☐ Declaration / CC&Rs | ☐ Confirm notice deadline & method
<i>Notice: 10-60 days before the meeting; 30 days if mailed by a method other than first-class...</i> |
| ☐ Bylaws | ☐ Confirm quorum requirement
<i>Quorum: 10% of votes entitled to be cast, unless the Act, articles, or bylaws provide a h...</i> |
| ☐ Adopted meeting/election rules | ☐ Confirm agenda notice requirements
<i>Agenda: Notice of an annual or regular meeting must describe matters requiring member a...</i> |

PREPARE & SEND NOTICE

- | | |
|---|--|
| ☐ Notice sent by required method
<i>Mail / hand delivery / electronic as bylaws permit</i> | ☐ Notice includes: election information (if applicable) |
| ☐ Notice sent within required window | ☐ Notice includes: proxy instructions (if applicable) |
| ☐ Notice includes: date, time, location | ☐ Affidavit / proof of notice prepared |
| ☐ Notice includes: agenda items
<i>Notice of an annual or regular meeting must describe matters requiring member approval; s...</i> | |

Watch out: Do not copy last year's notice without checking whether the meeting involves an election, amendment, budget change, or director removal - those may require different notice language or a longer window.

BUILD THE QUORUM WORKSHEET

TOTAL VOTING INTERESTS

VOTES NEEDED FOR QUORUM

NOTICE SENT DATE

MINUTES RECORDER

QUORUM REQUIREMENT

10% of votes entitled to be cast, unles...

MEETING DATE / TIME

NOTICE METHOD

ELECTION REQUIRED?

Yes / No

VERIFY PROXIES (MEMBERSHIP MEETINGS)

- | | |
|---|---|
| ☐ Each proxy is signed | ☐ No conflicting / duplicate proxies |
| ☐ Each proxy is dated | ☐ Proxies logged in a proxy register |

☐ Each proxy identifies the meeting

☐ Proxy validity / expiration checked

General nonprofit proxy: valid 11 months unless a different period is stated, never more ...

☐ Proxy is from an eligible voting interest

ELECTION PREPARATION (IF APPLICABLE)

☐ Candidate eligibility confirmed

☐ Who counts ballots - identified in advance

☐ Nomination procedure followed

☐ Tie procedure established

☐ Voting method determined (secret / open ballot)

☐ Ballot / proxy forms prepared

PHASE 2 - AT THE MEETING

OPENING

☐ Call meeting to order - record exact time

☐ Identify presiding officer

☐ Confirm proof of notice

☐ Identify minutes recorder

ESTABLISH QUORUM -- BEFORE ANY VOTE

OWNERS PRESENT

VALID PROXIES

TOTAL REPRESENTED

REQUIRED FOR QUORUM

QUORUM ACHIEVED?

10% of votes entitled to be cast, unless...

Yes / No

If quorum is not met: do NOT conduct member business. Call the meeting to order, announce the quorum calculation, and follow the applicable adjournment procedure. In Idaho: Idaho Code Sec. 30-30-511 establishes quorum rules and provides that, unless one-third of the voting power is represented, the only matters that may be voted on at an annual or regular meeting are those described in the meeting notice. It does not establish a reduced-quorum or reconvened-meeting procedure.

CONDUCT THE MEETING

☐ Follow the prepared agenda

☐ Do not vote on matters outside the agenda

Especially amendments, assessments, director removal

☐ State each motion clearly before voting

☐ Do not conduct member business at a board meeting

☐ Record who made and seconded each motion

☐ Member speaking rights observed

Open meetings: Yes — board meetings must be open to HOA members and designated re

☐ Record the exact vote count and result

EXECUTIVE / CLOSED SESSION (BOARD MEETINGS)

☐ Valid statutory basis identified before closing

☐ Entry time recorded in minutes

☐ Exit time recorded in minutes

☐ Formal vote (if any) taken in open session after reconvening

☐ Post-session summary entered in minutes where required

Executive session is not a general privacy button. "We'd rather discuss this privately" is not a statutory basis. In Idaho, permitted categories: Five categories: (1) personnel, hiring, bid review, or contract negotiation; (2) records not subject to disclosure under Idaho nonprofit-corporation records law; (3) consultation with an attorney for legal advice; (4) ongoing/potential litigation, mediation, arbitration, or administrative proceedings; (5) sensitive matters concerning an individual member's property or assessments, including violations or delinquent assessments. Requires a majority board vote to enter.

IF NO QUORUM -- ADJOURNMENT

- | | |
|---|--|
| ☐ Quorum calculation announced and recorded | ☐ All proxies and attendance records preserved |
| ☐ Motion to adjourn made and passed | ☐ Adjournment procedure followed |
| ☐ New date / time / place announced or noted for re-notice | <i>Idaho Code Sec. 30-30-511 establishes quorum rules and provides that, unless one-third of the members are present, the meeting shall be adjourned to a later date, time, and place.</i> |

ADJOURNMENT

- | | |
|--|--|
| ☐ Motion to adjourn made | ☐ Ballots / proxies retained |
| ☐ Adjournment time recorded | <i>Do not discard - needed if results are challenged</i> |

PHASE 3 - AFTER THE MEETING

DRAFT MINUTES -- PROMPTLY

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|---|--|
| ☐ Association name, meeting type, date, time, location | ☐ Maker and seconder of each motion |
| ☐ Presiding officer and minutes recorder identified | ☐ Vote count and result for each motion |
| ☐ Proof of notice recorded | ☐ Election results recorded |
| ☐ Quorum calculation recorded | ☐ Executive session entry / exit times and any required summary |
| <i>Owners present + valid proxies = total represented vs. required</i> | |
| ☐ Each motion stated precisely | ☐ Adjournment time recorded |

Minutes are an official record, not a transcript. Record what was decided, not every word spoken. Avoid personal commentary. Good example: "Motion by Smith, seconded by Jones, to approve the landscaping contract for \$12,000. Passed 4-1." Bad example: "There was a long discussion and people seemed pretty divided."

RECORDS & FOLLOW-UP

- | | |
|---|--|
| ☐ Minutes approved at next appropriate meeting | ☐ Any required post-meeting notices sent |
| ☐ Ballots and proxies retained | <i>e.g. election results broadcast, assessment notices</i> |
| <i>Minutes retention: Minimum 10 years — HOAs must take minutes of all HOA meetings, includi...</i> | ☐ Action items assigned with owner and deadline |
| ☐ Records available for member inspection as required | ☐ Next meeting date confirmed and calendared |

IDAHO QUICK REFERENCE

Governing statute	Idaho Homeowner's Association Act, Idaho Code Title 55, Chapter 32, particularly §55-3204.
Member meeting notice	10-60 days before the meeting; 30 days if mailed by a method other than first-class or registered mail. The HOA Act (§55-3204(3)(b)) incorporates the general nonprofit corporation notice rules at Idaho Code §§30-30-501 and 30-30-505.
Agenda in notice	Notice of an annual or regular meeting must describe matters requiring member approval; special-meeting notice must describe the matter(s) for which the meeting is called. Idaho Code §30-30-505(3)(b)-(c).
Member quorum default	10% of votes entitled to be cast, unless the Act, articles, or bylaws provide a higher or lower quorum. If less than one-third of voting power is represented, only matters described in the meeting notice may be voted on. Idaho Code §30-30-511(1).
Proxy rules	General nonprofit proxy: valid 11 months unless a different period is stated, never more than 3 years from execution, revocable (§30-30-513). HOA-specific: no single owner may hold proxies representing more than 50% of total HOA votes, except for HOAs with fewer than 20 residences or during declarant control (§55-3204B(2)-(3), added 2025).
If quorum fails	Idaho Code Sec. 30-30-511 establishes quorum rules and provides that, unless one-third of the voting power is represented, the only matters that may be voted on at an annual or regular meeting are those described in the meeting notice. It does not establish a reduced-quorum or reconvened-meeting procedure.
Board meetings open	Yes — board meetings must be open to HOA members and designated representatives. Idaho Code §55-3204(1).
Board meeting notice	For an incorporated nonprofit HOA: regular board meetings require no notice unless articles/bylaws provide otherwise; special board meetings require at least 2 days' notice unless articles/bylaws provide otherwise (Idaho Code §30-30-614). The HOA Act's cross-reference in §55-3204(3)(b) is to the member-meeting notice statutes, not the board-meeting statute — the 10-day figure in some sources incorrectly carries the member-meeting rule over to board meetings.
Board quorum default	Majority of directors in office; articles/bylaws cannot authorize fewer than the greater of one-third of directors or two directors. Idaho Code §30-30-616(1).
Executive session	Five categories: (1) personnel, hiring, bid review, or contract negotiation; (2) records not subject to disclosure under Idaho nonprofit-corporation records law; (3) consultation with an attorney for legal advice; (4) ongoing/potential litigation, mediation, arbitration, or administrative proceedings; (5) sensitive matters concerning an individual member's property or assessments, including violations or delinquent assessments. Requires a majority board vote to enter.
Minutes retention	Minimum 10 years — HOAs must take minutes of all HOA meetings, including membership and board meetings, and preserve them for at least 10 years. Idaho Code §55-3204(3)(c).
Citation	Idaho Code §§55-3201-55-3213, particularly §§55-3204, 55-3204B; Idaho Code §§30-30-505, 30-30-511, 30-30-513, 30-30-614, 30-30-616. The 2025 proxy cap was added by HB 361 (2025 Idaho Session Laws, ch. 204), effective July 1, 2025.

These reflect statutory defaults for Idaho and apply only when your governing documents do not specify otherwise -- your declaration and bylaws generally control. This checklist is a governance aid, not legal advice. For contested elections, amendments, director removal, or disputed voting rights, have the association's attorney review the procedure before the meeting.