HOA Meeting Checklist -- Massachusetts

Annual Meetings · Board Meetings · Quorum · Minutes

Use this checklist for every HOA meeting in Massachusetts. This reflects Massachusetts has no comprehensive HOA/planned-community meeting statute. Ordinary HOAs organized as nonprofits are governed by M.G.L. c.180, particularly §6A. 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
- [ ] Special membership meeting
- [ ] Regular board meeting
- [ ] Special board meeting

REVIEW GOVERNING DOCUMENTS

- [ ] Declaration / CC&Rs
- [ ] Bylaws
- [ ] Adopted meeting/election rules
- [ ] Confirm notice deadline & method
  Notice: No numerical statutory default — bylaws determine the manner of calling meetings
- [ ] Confirm quorum requirement
  Quorum: Bylaws determine the number constituting a quorum — c.180 does not supply a l
- [ ] Confirm agenda notice requirements
  Agenda: Governed by bylaws and the statutory provisions applicable to the particular acti…

PREPARE & SEND NOTICE

- [ ] Notice sent by required method
  Mail / hand delivery / electronic as bylaws permit
- [ ] Notice sent within required window
- [ ] Notice includes: date, time, location
- [ ] Notice includes: agenda items
  Governed by bylaws and the statutory provisions applicable to the particular action being…
- [ ] Notice includes: election information (if applicable)
- [ ] Notice includes: proxy instructions (if applicable)
- [ ] Affidavit / proof of notice prepared

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
Bylaws determine the number constitutin…

MEETING DATE / TIME
_____

NOTICE METHOD
_____

ELECTION REQUIRED?
Yes / No

VERIFY PROXIES (MEMBERSHIP MEETINGS)

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

- [ ] Each proxy identifies the meeting
- [ ] Proxy validity / expiration checked
  Permitted unless articles/bylaws provide otherwise; a proxy dated more than 6 months bef
- [ ] 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	Bylaws determine the number constitutin…
QUORUM ACHIEVED?	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 Massachusetts: No general statutory reduced-quorum procedure — follow governing documents.

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: No HOA-specific open-board-meeting statute — governed by bylaws.
- [ ] 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 Massachusetts, permitted categories: No HOA-specific statutory executive-session categories — governed by bylaws.

IF NO QUORUM -- ADJOURNMENT

- [ ] Quorum calculation announced and recorded
- [ ] All proxies and attendance records preserved

- [ ] Motion to adjourn made and passed
- [ ] Adjournment procedure followed
  No general statutory reduced-quorum procedure — follow governing documents.
- [ ] New date / time / place announced or noted for re-notice

ADJOURNMENT

- [ ] Motion to adjourn made
- [ ] Ballots / proxies retained
  Do not discard - needed if results are challenged
- [ ] Adjournment time recorded

PHASE 3 - AFTER THE MEETING

DRAFT MINUTES -- PROMPTLY

- [ ] 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
  Owners present + valid proxies = total represented vs. required
- [ ] Executive session entry / exit times and any required summary
- [ ] 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
  e.g. election results broadcast, assessment notices
- [ ] Ballots and proxies retained
  Minutes retention: No specific HOA minutes-retention period — follow bylaws / general cor…
- [ ] Action items assigned with owner and deadline
- [ ] Records available for member inspection as required
- [ ] Next meeting date confirmed and calendared

MASSACHUSETTS QUICK REFERENCE

Governing statute	Massachusetts has no comprehensive HOA/planned-community meeting statute. Ordinary HOAs organized as nonprofits are governed by M.G.L. c.180, particularly §6A.
Member meeting notice	No numerical statutory default — bylaws determine the manner of calling meetings. M.G.L. c.180 §6A.
Agenda in notice	Governed by bylaws and the statutory provisions applicable to the particular action being taken.
Member quorum default	Bylaws determine the number constituting a quorum — c.180 does not supply a Model-Act-style numeric default. M.G.L. c.180 §6A.
Proxy rules	Permitted unless articles/bylaws provide otherwise; a proxy dated more than 6 months before the meeting is invalid, and it expires after final adjournment. M.G.L. c.180 §6A.
If quorum fails	No general statutory reduced-quorum procedure — follow governing documents.
Board meetings open	No HOA-specific open-board-meeting statute — governed by bylaws.
Board meeting notice	Governed by bylaws/corporate documents — no numerical HOA-specific notice period.
Board quorum default	Governed by applicable articles/bylaws/corporate provisions — no HOA-specific numeric default.

Executive session	No HOA-specific statutory executive-session categories — governed by bylaws.
Minutes retention	No specific HOA minutes-retention period — follow bylaws / general corporate records retention practice.
Citation	M.G.L. c.180 §6A. Note: c.183A is Massachusetts's condominium statute and does not apply to non-condominium planned-community HOAs.

These reflect statutory defaults for Massachusetts 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.