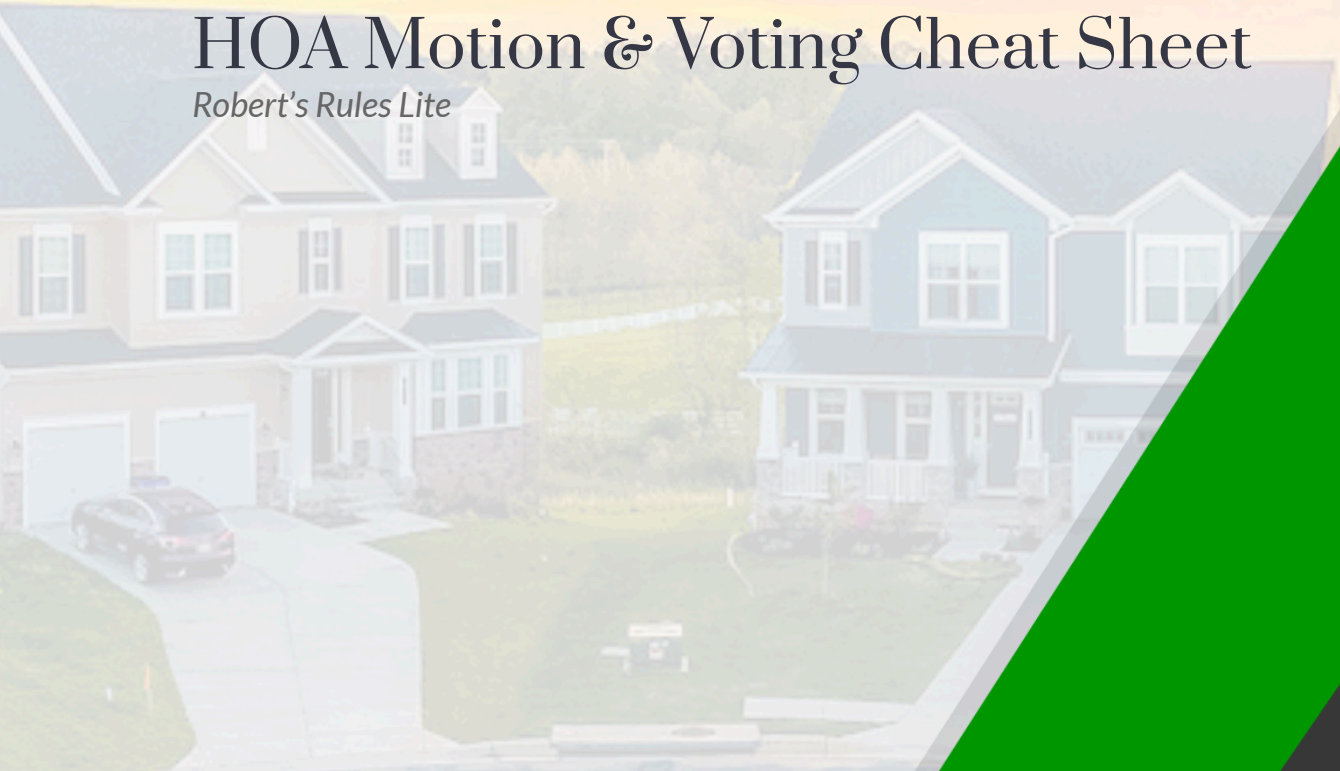
NEIGHBORHOOD .ONLINE™

HOA Motion & Voting Cheat Sheet

Robert's Rules Lite



https://neighborhood.online

How to Use This Sheet

This guide explains how HOA boards make decisions fairly, consistently, and in a way that protects the association. It simplifies Robert's Rules into a process boards can actually follow.

Keep this handy during meetings. It is designed to be used in real time.

When a Motion Is Required

A motion is required when the board is making a decision that affects the association, including:

- Spending or approving funds
- Approving contracts or vendors
- Adopting or changing policies
- Making decisions required by governing documents
- Taking formal action as a board

General discussion, brainstorming, and updates do not require a motion.

The 5-Step Motion Process

Every formal decision follows the same basic steps.

1. Motion
    a. A board member clearly states what they are proposing.
    b. Example:
    "I move that the board approve the landscaping contract with ABC Landscaping for the 2025 season."
2. Second
    a. Another board member confirms the motion should be considered.
    b. Example:
    "I second the motion."
3. Discussion
    a. Board members discuss the motion. Questions, concerns, and clarifications happen here.
    b. Discussion should stay focused on the motion at hand.
4. Vote
    a. The board votes to approve or deny the motion.
    b. Votes are typically:
        - Yes
        - No
        - Abstain (if appropriate)
5. Document
    a. The motion, vote outcome, and any follow-up actions are recorded in the meeting minutes.
    b. If it is not documented, it did not officially happen.

What Requires a Vote vs What Doesn't

Typically requires a vote:

- Financial decisions
- Contracts and vendor approvals
- Policy changes
- Rule enforcement actions
- Major operational decisions

Typically does not require a vote:

- Informational updates
- Committee reports
- Open discussion without action
- Planning conversations

When in doubt, make a motion.

Common Mistakes Boards Make

- Skipping the motion and voting anyway
- Voting without clearly stating what is being voted on
- Letting discussion drift off topic
- Failing to record the decision in the minutes
- Allowing one person to decide without board approval

Following the process prevents confusion and conflict later.

What Goes in the Meeting Minutes

Good minutes include:

- The exact wording of the motion
- The name of the person who made the motion
- The name of the person who seconded the motion
- The vote result
- Any assigned follow-up actions

Minutes should capture decisions and outcomes, not verbatim discussion.

Important Reminder

The motion process exists to ensure fairness, transparency, and accountability. It protects board members by creating a clear record of how decisions were made.

You do not need to memorize Robert's Rules.

You only need a consistent process.