

_____ANNUAL CALENDAR” (Jan. - Dec.)

January:

- Order loss history from insurance agent
- Review reserve study - calendar projects for the year

February:

- Obtain bids for insurance renewal

March:

- Submit insurance quotes to board for review
- Taxes due by the 15th of March

April:

- Pest control contract expires

May:

- Insurance expires on the 22nd of May
- Board review Rules & Regulations and Violations Policy

June:

- Obtain bids for reserve study
- Landscape contract expires

July:

- Submit reserve study bids to board
- Send out the call for candidates for board of directors

August:

- Start budget preparation - contact service providers and utility companies regarding rate increases for following year
- Send out annual meeting notice
- Board review reserve study

September:

- Board review collection policy
- Annual meeting
- Submit draft budget to board for review
- Board review and approve reserve study

October:

- Board approves budget for following year, including any monthly assessment increases
- Obtain bids for taxes

November:

- Mail budget package to members by the 30th of November (no less than 30 nor more than 90 days prior to the beginning of fiscal year)
- Mail required annual disclosures to members by the 30th of November

December:

- Verify assessment rate with accounting before January 1st
- Adjust reserve contributions per the reserve study and the new budget