

# Periodic Calendar



When we discover something that will require our attention on a periodic basis, we record it here so we won't forget it.

Monthly, the President should review this calendar and transfer upcoming items onto the agenda and/or Activities Tracking Report to ensure they are given attention.

## *February*

Quarterly maintenance check walk-through by Grounds and Maintenance Committee.

## *March*

Complete thorough inspection of common area irrigation systems in preparation for warmer weather. Note and schedule components requiring repairs and adjustment.

Review Architectural Review Committee membership and participation level. Appoint new members as necessary to maintain to the number prescribed by the Declaration.

## *April*

Turn on swimming pool heaters.

## *May*

Request Social Committee to organize a July 4th barbecue & potluck picnic. Request Newsletter Committee to help publicize it.

Quarterly maintenance check walk-through by Grounds and Maintenance Committee.

## *June*

Inspect all asphalt surfaces for resealing/resurfacing requirements and schedule maintenance if needed.

Appoint a Nomination Committee to nominate as many qualified Board candidates as there will be openings. (See the Nomination Committee charter.)

Notify members that anyone wishing to run for the Board should so inform the Board or Nomination Committee and provide a brief (suggested 200-word limit) personal and/or campaign statement for publishing with the Annual Meeting and ballot announcement.

Review and update escrow file disclosure letter—the letter approved by our attorney for meeting any of our disclosure requirements for purchasers of our condominiums.

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## *July*

Social Committee holds July 4th barbecue & potluck picnic.

Appoint either one or three Elections Inspectors to receive and count the ballots at the elections.

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## *August*

Quarterly maintenance check walk-through by Grounds and Maintenance Committee. Nomination Committee completes nominations and forwards nominee statements to our secretary for preparing mailer. Note, our mailer must comply with our Bylaws requirements..

Mail our Annual Meeting and ballot announcement at least 30-days prior to the meeting. Plan our Annual Meeting. (See Annual Meeting and Elections in the Directors' Topics section of this binder.) This meeting may be the only type of association meeting that some of our members will ever attend and it is very important that it be successful.

The budget cycle is about to begin in preparation of next year's budget. If there is no active or standing budget committee, the president should appoint one to be in place when the budget cycle begins.

Alert committee chairpersons to submit budget requests for the next fiscal year.

## *September*

Turn off swimming pool heaters.

Make final preparations for September Annual Meeting. (See the topic in this Directors' binder entitled The Annual Meeting for details.)

Ensure nominees have been contacted about making a brief statement of introduction at the Annual Meeting. (Limit to one minute.)

Ensure the awards committee has identified recipients and that awards will be ready. (See Awards Committee charter.)

Ensure the Social Committee is planning the after-meeting social. (See Social Committee charter.)

Ensure each committee chairperson has been contacted to see if he or she wishes to present a committee report at the Annual Meeting.

At the Annual Meeting, pass a resolution to allocate any excess assessments received this year toward next year's budget or to refund such excess assessments to homeowners.

This must be approved by homeowners before the end of the fiscal year to help us avoid being taxed on such amounts under the Internal Revenue Ruling 72-102 when excess assessments exist over and above the amounts used for the operation of the Association. (This should be confirmed with our accountant.)

Identify expenses requiring special study in preparation for budgeting process.

Request that Budget Committee schedule meetings to develop the budget.

## *October*

Request Social Committee to plan and organize a holiday social. Request Newsletter Committee to help publicize it.

Board may appoint a new Board Advisory Committee. (See charter in Committees' Handbook.)

Prepare and distribute to Board and management the new roster of Board members and officers, including addresses and phone numbers.

Appoint new committee members as necessary. Re-appoint committee-Board liaisons.  
Prepare and distribute a new committee roster to Board members and management.  
Develop the budget for the coming fiscal year. It is due next month.

### *November*

Quarterly maintenance check walk-through by Grounds and Maintenance Committee.  
The President and Secretary prepare and distribute to all residents a new “Residents’ Handbook Supplement Page(s).” This contains information subject to change, such as an updated list of Board and committee contacts, phone numbers, and any addendum and errata to our Residents’ Handbook.  
Pro Forma Budget must be finalized, approved and sent to all members by no earlier than the 1st and no later than the 15th.

### *December*

Social Committee conducts a Holiday party or social.  
Review and update escrow file disclosure letter—the letter approved by our attorney for meeting any disclosure requirements for prospective purchasers of our condominiums.

### *Monthly Ongoing Activities*

**Activities Tracking Report:** This is a very important control document used to ensure that tasks assigned to volunteers and management are accomplished and objectives and projects are followed-up on (and not forgotten!). Mark-off items on the list as completed. Prepare updated report monthly, sorted by priority, and bring copies to Board meeting for review.

**Newsletter preparation:** Newsletter committee should prepare camera-ready copy and deliver to management or have ready for pickup by the 24th of the month. There needn’t be a newsletter *every* month but try to have at least one per quarter.

As you think of other needed monthly activities, please write them here.

### *Yearly Ongoing Activities*

**Tree management:** Every 4-5 years have a long term tree-care plan prepared.

**Reserves Study:** Every 3 years.

As you think of other needed yearly activities, please write them here.



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