**Condominium**

**Owners Association**

**

**Annual Planning & Events**

**Calendar**

**Prepared by:**

**{Management Company Name}**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20XX**

**

# **January**

* The Board adopts an annual Meeting Calendar including dates, times and locations of Board and Membership Meetings.
* {*Company Name*} notifies owners of scheduled meeting dates.
* Staff salary adjustments, if any, are implemented for the payroll that begins January 6th, {*Company Name*} will implement as budgeted unless the Board directs otherwise.
* If there is a dues increase, it will be implemented by {*Company Name*} effective January 1st.
* The Board should schedule time to review the Reserve Study Repair & Improvement Schedule. The Board should give direction to {*Company Name*} } on what projects are to be undertaken and what projects are to go out to bid.
* Maintenance Staff will present goals and measurable objectives to the new Board for the upcoming year.
* {*Company Name*} reviews vendor & payment histories, prepares and mails the 1099’s as required.
* {*Company Name*} reviews Owner /rental unit histories, prepares and mails the 1099’s as required.
* The Maintenance staff should schedule a thorough inspection of interior hallways and interior staircases. Minor repairs and painting to be completed. Costly & unscheduled repairs to be brought to the Board’s attention.
* Maintenance Staff to inspect interior elevator cabs for repairs, maintenance and cleanliness.
* Holiday decorations to be removed, if installed.
* Quarterly Fire Alarm System due
* Maintenance staff completes a monthly night light check.

**

## **February**

* Board should review Insurance Policies and advise {*Company Name*} of changes and/or if the policies are to go out to bid. The Master, Directors & Officers and Umbrella Policy renew in April.
* Maintenance & housekeeping staff prepare updated Tool, Equipment and Supply inventories. Inventories to be provided to the Board.
* Maintenance Staff causes an inspection of the electrical panels, meter box, breakers and equipment for damage.
* Community Committee should present to the Board goals and objectives for the upcoming year for review and approval.
* Landscape Committee should present to the Board goals and objectives for the upcoming year for review and approval.
* Maintenance staff inspects interior building door hinges on garage doors, utility closets, shops, lubricate, and repair as necessary.
* Inspection of Association’s vehicle for cleanliness, scheduled maintenance and repair, verify insurance & registration are in vehicle.
* Maintenance staff should survey garage structures for vehicle damage. Damages that can be attributed to an owner should be reported to the Property Manager and repairs scheduled.
* Key Security and Control procedures to be reviewed. Records updated to reflect persons with keys to property. Key Control status to be provided to the Board.
* Maintenance staff completes a monthly night light check.

**

## **March**

##

* If the Board had requested that {*Company Name*} obtain, the Board should review bids for the Master, Directors & Officers, Liability and Earthquake Insurance policies.
* The Board should approve the Tax Returns.
* Once approved and signed by the Board, {Company Name} will mail the State and Federal tax returns. Mailing must be completed by March 15th
* The Board should review and approval of the Audit/Review.
* {*Company Name*} should enter the year-end journal entries as provided by the Auditor.
* The Maintenance Staff should complete a survey of the exterior building surfaces. A report should be generated by the staff to report their findings to the Board.
* Maintenance Staff should direct the Landscapers to schedule an inspection of the irrigation valve boxes to make sure they are not covered with soil or plants.
* Maintenance Staff should direct the Landscapers to schedule an inspection of the waterways to make sure they ready for Spring start up.
* Maintenance Staff should direct the Landscapers to schedule Spring Start Up of the irrigation system and provide the Association with a list of any deficiencies.
* The Maintenance staff to survey all property signage for needed repairs. A report is to be prepared by the maintenance staff for the Board.
* Maintenance staff completes a site-perimeter inspection, cleaning debris from the hillsides and other remote areas. Inspecting for repairs and safety hazards.
* Exterior plant pots to be inspected, damaged pots discarded, purchase new pots as needed if budgeted otherwise request Board approval.
* Maintenance staff completes a monthly night light check.



## **April**

##

* {*Company Name*} will coordinate the mailing of the Audit/Review to the owners.
* Master, Directors and Officers, Umbrella Renew. {Company Name} to notify the owners of insurance changes, if changes occurred.
* The Board should review the Reserve Study before to the April Board Meeting date. The Board should determine what changes are required. If changes are required, the changes will be given to the reserve prepared by {*Company Name*}. If a new study is required, and the Board requests bids, EBMC shall obtain bids.
* Proposals for outside contractors for Fire Break work, if requested by the Board, are to be presented at the April Board Meeting. Annual Fire Break work should then begin.
* April 15th the estimated quarterly state & federal tax payments are due, if required {Company Name} shall prepare.
* Send reminder to the Homeowners reminding them of their obligation to clean dryer vents and chimney flues.
* Onsite Staff and/Property Manager (if directed) will perform Annual site walk-through with the Architectural Committee to identify homes that require notice of Architectural Violations.
* Maintenance Staff to inspect interior elevator cabs for repairs, maintenance and cleanliness.
* Quarterly Fire Alarm System due.
* Maintenance staff completes a monthly night light check.



### **May**

* If the Board had requested, {*Company Name*} } should present to the Board for review & approval a proposal for preparation of the new Reserve Study. Or if no proposals were obtained, the Board should be in a position to review and approve the updated reserve study submitted by their reserve preparer.
* If summer help will be needed, hire additional staff as approved by the Board and Budget.
* Maintenance staff to inspect hard surfaces (asphalt, sidewalks and curbs) and schedule necessary minor repairs, all other unscheduled costly repairs to be brought to the Board’s attention for approval.
* Review computer software licenses for current registrations, pirated software applications installed is to be removed.
* Maintenance staff completes a monthly night light check.



### **June**

* The Maintenance staff should sanitize and inspect trash shoots and refuse containers and enclosures.
* Maintenance staff to notify landscapers that high-weed mowing along perimeters of property to be occur.
* Maintenance staff should inspect Garbage room enclosures and mailboxes for damages and make necessary repairs.
* June 15th the estimated quarterly state and federal tax payments are due, if required {*Company Name*} shall prepare.
* Maintenance Staff to inspect interior elevator cabs for repairs, maintenance and cleanliness.
* Maintenance staff completes a monthly night light check.



# **July**

* Annual Painting of Red Curbs begins.
* The Maintenance staff should schedule a survey roof conditions, gutters and down-spouts. A report is to be prepared by the maintenance staff for the Board’s review.
* {*Company Name*} reviews the Vendor Insurance Certificate Log.
* {*Company Name*} } reviews vendor payment histories, prepares and mails Employment Development (EDD) forms to vendors as required.
* Verify elevator permits properly posted.
* Verify employee postings are current and posted.
* {*Company Name*} Management Contract renews August 1, 20XX, {*Company Name*} to provide proposal to the Board.
* Hold Employee Safety Meeting
* Quarterly Fire Alarm System due
* Maintenance staff completes a monthly night light check.



#### **August**

* Nominating Committee solicits candidates for the Board.
* The Board should confirm the Annual Meeting date.
* Annual Meeting Location confirmed by {*Company Name*}.
* The Board should schedule a Budget Meeting for October.
* If owners have not been informed, notify owners of Budget Meeting Date, time and location.
* Maintenance staff to review winter supplies and equipment needs. Ordering necessary supplies, winter weather gear and reporting to the Property Manager specific equipment and supply needs.
* The Maintenance Staff schedules recharging Fire Extinguishers.
* The Maintenance Staff shall review of Material Safety Data Sheet Binder, updating with MSDS forms as required.
* The Maintenance Staff will coordinate an inspection of the electrical panels, meter box, breakers and equipment for damage and wear-and-tear.
* Red Curb Painting is completed.
* Maintenance staff completes a monthly night light check.



#### **September**

* Nominating Committee provides the Board with the list of candidates and Nominee Profiles.
* {*Company Name*} sends the Annual Meeting Material to owners.
* {*Company Name*} should present the first draft of budget to the Board.
* Employee Evaluations are performed.
* Necessary roof, gutters & downspouts repairs should be complete.
* Community Committee (or Secretary) plans refreshments for the Annual Meeting.
* If directed by the Board, obtain proposals for the year-end Tax and Year End Financial Report or solicit proposal from existing vendor.
* {*Company Name*} to survey the Backflow valves to assure they are all protected against freezing.
* September 15th the estimated quarterly state and federal tax payments are due, if required {*Company Name*} shall prepare.
* Scheduling of Fall Tree work. It is suggested that the Landscape Committee perform a walk through with onsite staff. Maintenance staff will then obtain proposals for work to be performed.
* Maintenance Staff to inspect interior elevator cabs for repairs, maintenance and cleanliness.
* Maintenance staff confirms that the Landscapers have scheduled the shut down of the irrigation system for the winter.
* Exterior flower pots to be removed and placed in storage for the winter.
* Maintenance staff completes a monthly night light check.



#### **October**

* Budget Meeting held.
* Upon approval of the Budget, {*Company Name*} to forward copy to homeowners.
* Annual Meeting is held.
* At conclusion of the Annual Meeting, the Board should decide if a Board Training or Planning Meeting should be scheduled.
* {*Company Name*} to prepare Annual Report due to the Secretary of State’s office no later than October 31st, notifies the state of Board Members.
* {*Company Name*} to prepare for the Board’s signature new bank signature cards, if new Board Members were elected.
* Community Committee (or Secretary) reports to Board on Social Event Calendar for the upcoming year.
* The Maintenance Staff should survey all storm drain grates to be sure they are clear.
* Winter tree trimming/removal work should approved by the Board and contracts signed.
* Irrigation system should be shut down for the winter.
* Quarterly Fire Alarm System due
* Maintenance staff completes a monthly night light check.



### **November**

* The Board elects its Officers
	+ The Board appoints Committee Members.
* The Association’s Treasurer should review the FDIC limits and make recommendations for placement of funds in interest bearing accounts.
* The Board should discuss whether Employee bonuses are to be awarded.
* Holiday decorations – to be installed as approved by Board.
* Trash shoots and refuse areas to be inspected for repairs and sanitized.
* {*Company Name*} is to present Landscape bids to the board, if requested.
* {*Company Name*} orders coupon books.
* Winter Tree work to be completed.
* Annual Backflow Inspections are required for the Maintenance Staff to coordinate the inspection with an approved plumber.
* Irrigation systems should be off, review of water bills for irrigation leaks.
* Maintenance staff will perform an inspection of all power tools, ladders, and extension cords as preventive maintenance. A report by the staff will be provided to the Board.
* Maintenance staff completes a monthly night light check.



### **December**

* By 12/31 bank accounts should be below the FDIC limits and investments made as determined by the Board.
* Coupon books are distributed to owners by {*Company Name*}.
* Board should solicit Committee members, Architectural, Community, Landscape, operations, financial or other committees.
* The Maintenance Staff should notify owners about the disposal of Christmas Trees.
* December 15th the estimated quarterly state and federal tax payments are due, if required {*Company Name*} shall prepare.
* Maintenance staff completes a monthly night light check.

**Legendary Service Provided by Exceptional People**

**Thank you for a job well done!**

**DISCLAIMER:** These sample forms and agreements are not endorsed by BRP Education™. They are presented for informational purposes only and should not be relied upon for accuracy, completeness or consistency with applicable law. The user is advised to check all applicable state and federal law before using these forms, agreements, or parts thereof. Because certain forms have legal implications (e.g., management agreements, rental applications), it is recommended that downloaded versions of such forms should be reviewed with legal counsel prior to their use and that any modifications made by the user should also be reviewed by legal counsel.