

Developing the Annual Calendar

One of the most important roles of the Board of Directors for a community association is to establish the direction of the association and allocate the necessary resources. Most of this work is done through the approval of your annual budget, which many of you just completed for 2013. The resources you have available to allocate in this process include both dollars and human resources. Dollars take the form of the assessments you collect for operations and reserves, and human resources are the time required of your community management team, the board and other volunteers. One way to assure that you use these resources wisely is to create an annual plan also referred to as an Annual Calendar.

Used effectively, Annual Calendars become the road map for management to control operations and for volunteers to manage deadlines for community functions. It becomes the single-source of all of the critical events, activities, compliance and renewal dates for the year.

Following is a sample listing of items found in an Annual Calendar:

- Meeting Dates (Board Meetings, Committee Meetings and the Annual Members meeting)
- Routine Preventative Maintenance (gutter cleaning, equipment service, carpet cleaning)
- Reserve Projects (replacement of common area components)
- Facilities Open and Closing Dates (swimming pools)
- Election milestones (call for candidates, mailing of election materials, meeting plan)
- Budget Preparation Cycle
- Insurance Policy Renewal Dates & Milestones
- Common Area Inspection Schedule
- Social Events
- Newsletter Publication Dates

The intent is to note key dates and events, however the details will generally be found in other documents.

In addition to the operational benefits of having all of the community priorities noted in one location it can also serve as an effective communication tool. Think about the time you spend at board meetings explaining to members the current priorities or defending a scheduled expense. If you publish the calendar, and have it available on the association's website, everyone in the community will know what they can expect during the year and they'll know that the funds for all the activities published in the calendar have been included in the approved budget.

So, with the approval of the budget fresh in your mind, and the beginning of a new year less than a month away, now is the time to get that annual calendar completed. Not only will it help you track your accomplishments, but it will improve communication between the board and the members of the association.