



# COMMUNITY BUILDER

## Annual Community Calendars - A Strong Start to a New Year!

Does your Board have a few new members currently getting up-to-speed? Or perhaps the Board is somewhat tenured but struggling to keep up with the demands of the community? Or maybe the Board is made up of individuals with plenty of talent but difficulty keeping everything organized? If any of these apply to your association, an annual community calendar (and the process of creating one) may be just what is needed to get the Board on the same page, organized, and effectively address the community's pressing needs in an orderly fashion.

In any situation, if the Board is struggling to set clear objectives for the year or if the many tasks and goals seem to be missed, forgotten, or behind schedule – then an annual community calendar can help alleviate some of the uncertainty.

Perhaps one of the best tools used by Boards and managers alike – the annual community calendar is an effective solution to help ensure an organized and productive year.

We recently spoke with the Division Manager of the Sentry Des Moines Office, Hannah Heckman. Hannah has been working with Boards to develop annual community calendars for several years. Here is what Hannah had to say about the value of this exercise: "A community calendar is a tool that is developed at the beginning of each year to set forth the business, objectives, and goals of the association for that year. It's a simple concept: associations that plan out, organize and schedule their business objectives ensure progress and success. Add to that, Boards who stick to the plans tend to work better as a team because everyone understands the tasks at hand."

Okay, it's decided – an annual community calendar is a necessary tool that makes the job of the Board and manager a little easier. The next question is likely 'How do we get started?' Here are the steps of the process for creating the annual community calendar:

### **Step 1: Create a list of yearly tasks in the categories of administrative, building & grounds, and social.**

This step will likely take the most time, and we encourage the Board Members to work on this



as a team. Consider splitting up the categories amongst team members to divide and conquer. At the end of this article, we've included a list of the most common tasks in the three categories, which should provide your team with a great head start.

As the task lists are created, the Board will need to consider the steps of each task. For instance, the budget process. While the budget may be just one task on a long list, there are likely multiple steps to this specific task. As an example, the calendar may list budget events like this:

#### Task – Annual Budget

- August: Budget prep
- September: Budget review/approval
- October: To Sentry for distribution
- November: Notification to homeowners

We can see that each step of the process is essential to include as the year progresses. Another example would be vendor contracts. The calendar should include contract expiration dates, but if the Board will shop the service, there may also need to be an RFP date 60 to 90 days before the expiration to allow time to evaluate a replacement provider.

#### **Step 2: Create the Calendar Format.**

Now it's time to create the calendar and place all events from the lists onto it. Hannah, our contributor from the Des Moines office, offered this advice: "Creating the calendar could be as simple as a word document with a section for each month, or some boards like to take a creative approach by adding events into an actual calendar in the day of the month as applicable. Another option is to utilize the calendar feature within Sentry's CommunityPro™ portal. The portal offers multiple calendar options, so there could be one for admin tasks, one for grounds & buildings, and one for social. The great thing is that a master calendar populates automatically so the Board and homeowners can view all tasks in one place."

Whichever format is chosen, consider making it available for homeowners to review. This effort will provide an extra level of transparency and help homeowners understand just how much the Board and management are responsible for executing throughout the year. Hannah added this, "Homeowners who understand the goings-on generally have a better perception of their HOA and the role of the Board Members."

#### **Step 3: Review the calendar proactively.**

At this point, the Board has gone through the work of creating lists and formatting the calendar. So, how does the Board ensure that the plans are followed, and objectives met? Perhaps the most straightforward method for keeping up with the calendar is to review upcoming tasks proactively. We recommend adding this as an agenda item at each meeting. Depending upon the regular meeting schedule, the Board would monitor all upcoming tasks in the next 60 to 90 days and any tasks that may have been missed or delayed. This method of review keeps the whole team accountable.

Now that we've covered the steps to building and using an annual community calendar, it may appear to some to be too arduous a task. Some may deem that time is better spent actually doing the work instead of just planning it. However, we encourage Board Members to invest the time in creating an annual community calendar as it will save time in the long run. And think, each year, the calendar only needs minor updating. The initial commitment to creating

this valuable tool will reap many rewards in the near and distant future.

### **Most Common Tasks to Include on an Annual Community Calendar**

#### **Administrative:**

- Fiscal year begin and end
- Board meeting schedule
- Annual meeting schedule
- Property visits
- Contract expirations
- Annual budget process
- Newsletter mailings
- eBlast communications
- RFP dates

#### **Building & Grounds**

- Equipment inspections
- Preventative maintenance
- Irrigation startup/shutdown
- Snow marker installs
- Gutter cleaning
- Dryer vent cleaning
- Shrub/Tree pruning
- Fountain maintenance
- Pool opening/closing
- Pressure cleaning

#### **Social**

- Community events
- Food truck schedule
- Community contests
- Community charity events
- Garage sale dates
- Advertising dates

*The information contained in this article is provided for informational purposes only and should not be construed as legal advice. No recipient of this content should act or refrain from acting without seeking the appropriate legal or other professional advice.*



**Hannah Heckman**  
Division Manager, Des Moines, IA  
Sentry Management, Inc.

Hannah Heckman is the Division Manager of the Sentry Management office in Des Moines, Iowa. She has worked with community associations in the Heartland for many years and is a Certified Manager of Community Associations (CMCA®) and an Association Management Specialist (AMS®.) Hannah has a passion for serving our client communities and bringing out the best in her team in Des Moines.



The Community Builder is a newsletter prepared exclusively for Board Members of associations managed by Sentry Management. If someone on your Board is not receiving this newsletter, they can be added by entering or updating their address in the CommunityPro® PORTAL or forwarding them a copy.