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COMMUNITY LIVING

Annual calendar can keep an association on track

By Pamela Dittmer McKuen
Special to the Tribune
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Does your board ever sit down to a meeting and someone asks, "What are we doing tonight?" Hopefully not. If the association's leaders keep an annual calendar, everyone will know which tasks need to be completed tonight and next month and six months from now.

Annual calendars help association operations flow smoothly through the seasons and assist the board in its planning, said association consultant Angela Falzone of Association Advocates in Park Ridge and Chicago.

"You don't want to end up doing crisis management or have necessary items fall through the cracks," she said.

An effective calendar details all the board's administrative, legal, financial and maintenance responsibilities and deadlines for the coming year and maybe beyond. It can be a computerized spreadsheet with a column for each month's to-do items, or it can be a handwritten list in a spiral notebook. But it should be easy to follow so board members and managers can quickly see that election notices need to be sent to the owners next week or that it's time to get the windows washed.

Tasks to list under monthly headings depend partly on the association and its amenities. Some activities take place monthly, while others occur quarterly or annually. Board meetings, for example, might be held the third Tuesday of every month except August. The elevators might undergo twice-yearly inspections and your reserve-study update should be done in 2008.

Bill DeMille, president of Chicagoland Management & Realty in Chicago, organizes annual calendars by first listing activities with specific dates, perhaps when the landscaping committee meets, and then listing activities to be completed any time during that month such as inspecting the common-area trees.

Falzone suggests getting started by looking at your governing documents for requirements such as when the annual meeting is held and when the fiscal year begins.

Next, get out your contracts and note the expiration dates. Three months before the expirations, review both the contracts and vendor performances. Give yourself plenty of time to make good buying decisions, said Falzone.

"If you're not happy with the services you've been getting, you don't want to wait until the moment before the contract ends to start the process to negotiate a better deal or find somebody else," she said.

Seasonal contractors should be booked even further in advance, she said.

"You want to hire your landscaper in January and you want to hire your snow plower in August," she said.

When scheduling maintenance and housekeeping activities, consider the logical sequencing to

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prevent costly do-overs, she said.

"Do the carpet cleaning after the painting is done," she said. "Otherwise, if you paint the wall and lay the carpeting and scratch the wall, you have to repaint the wall. Window washing should be done after the tuckpointing."

Other activities you might include are an annual review of association rules, deadlines for tax filings, maturity dates for certificates of deposit and when municipal permits, applications and inspections are due.

"Check your reserve study to see what kinds of projects are coming up this year," said DeMille.

Good times to launch an annual calendar are at the beginning of the association's fiscal year or after an annual meeting when new members join the board, he said.

"The important thing is to do it," he said. "It's a lot of work, but once you're there, all you have to do is follow the list."

"You don't have to reinvent the wheel every year," said Falzone. "All you do is tweak it. And when you leave the board, future members take the annual calendar and the process is in place for them."

Meeting

Condo Lifestyles magazine is sponsoring its annual State of the Industry, a review and forecast of trends for community associations, from 1 to 6 p.m. Dec. 15 at the Chicago History Museum, 1601 N. Clark St. The event includes sessions on the growing senior population in associations, life safety issues and a legal update. The cost is \$105 for industry professionals and \$25 for association volunteers. For information and registration, call 630-932-5551.

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