



WORKSHEETS

THE BLUEPRINT for BOARD MEMBER SUCCESS



Associa®



DEVELOP A PROACTIVE PLAN TO LEAD YOUR COMMUNITY

Every community association is unique. However, the path for becoming the best possible volunteer board member is always the same.

Use this workbook as a companion piece to our in-depth whitepaper, *The 6 Most Important Elements for Running Your Board Like a Pro*, to proactively improve the operation of your community association.

Inside, you'll find three important resources you need to develop a forward-looking plan for your community:

1. A Values Worksheet to guide your board in determining the core values and vision of your association;
2. A Master List Worksheet to help you prioritize your association's duties; and
3. A sample Annual Calendar to illustrate how to set a clear plan for the coming year

Are you ready to lead your community with less friction and better results?

Use these worksheets to get started!

Table of contents

Values Worksheet	5
Master List Worksheet	6
Sample Annual Calendar and Tips	8

TAKE ACTION!

Determine Your Community's Unique Characteristics and Create The Master List

These action sheets are designed to help you gather information your board will need in order to complete the strategic planning process.

The first sheet, "Determine Your Community's Unique Characteristics," is designed to be filled in during a one to two hour discussion with your board about the purpose of your association and your core values. Every association is different and your values will be determined by your region, demographics, and size. Choosing these defining characteristics will help you keep the identity of the community in mind while you're creating the master list and prioritizing action items.

The second sheet, "Create The Master List," will help you keep track of all the ideas, priorities and projects that your board wants to accomplish in the short-term, mid-term and long-term. This sheet will be useful to you or your facilitator for organizing ideas so that they can be referenced for a detailed discussion about the community's most pressing needs and important goals in the next few months, year, or several years.

Print out these sheets and bring them to your strategic planning session to maximize the productivity of discussions and map out your community's vision.

Action Sheet

Determine Your Community's Unique Characteristics

WHAT MAKES YOUR COMMUNITY UNIQUE?

1. _____
2. _____
3. _____

WHAT CHARACTERISTICS ABOUT YOUR COMMUNITY DO YOU WANT TO PRESERVE?

1. _____
2. _____
3. _____

WHAT ARE THE MOST IMPORTANT TO YOUR MEMBERS?

1. _____
2. _____
3. _____

WHAT ARE YOUR BIGGEST PRIORITIES?

1. _____
2. _____
3. _____

Action Sheet

Create The Master List

PHYSICAL PROPERTY

1. _____
2. _____
3. _____

COMMUNITY AND SOCIAL

1. _____
2. _____
3. _____

FINANCIAL

1. _____
2. _____
3. _____

GOVERNANCE

1. _____
2. _____
3. _____

COMMUNICATION

1. _____
2. _____
3. _____

OTHER

1. _____
2. _____
3. _____

Planning and Directing

ANNUAL CALENDAR

One of the most important roles of the Board is establishing the direction of the association and allocating resources. The resources you have to allocate are dollars and human resources. Dollars take the form of the assessments you collect for operations & reserves and human resources are the time of your community management team, the Board and other volunteers. One way to use these resources wisely is to create an annual plan. Creating an annual plan may occur as part of the budget process while you determine the projects you want to complete for the coming year.

Used effectively, annual calendars become the road map for management and the Board of Directors to. It becomes the single-source of all of the critical events, activities, compliance and renewal dates for the year.

Common items found in an Annual Calendar:

- Meeting Dates
- Routine preventative maintenance items
- Reserve projects
- Facilities Open and Closing dates
- Election milestones
- Budget Preparation Cycle
- Certificate of Deposit renewal dates
- Insurance renewal dates
- Contractor Walk through dates

See sample Annual Calendar on the next page.

SAMPLE ANNUAL CALENDAR

JANUARY	FEBRUARY	MARCH
- Obtain Annual Landscape Calendar - Prepare Annual Calendar - Update Rules & Regulations booklet for Feb. Mailing - Tree Maintenance Plan MEETING, January 26 @ 7:00 PM - Second Gutter Cleaning - Year End review to homeowners	- Finalize any major capital pool projects prior to season opening - Distribute Rules & Regulations booklet to homeowners MEETING, February 23 @ 3:00 PM - Capital Projects in '11:	- Review Roof Maintenance program. inspections to be done in '11 MEETING, March 23, 7:00 PM - Begin power wash program
April	May	June
- Landscape improvements underway by way of Landscape Committee - Final preparations for opening day of swim season, notify Pool Contractor of opening date - Check & clean storm drains for blockage - Lubricate mail box locks - Clean filters on A/C at clubhouse Meeting, April 27, 3:00 PM	- Property Walk to inspect for Common Area improvements - Open Pool - Notify Owners & Renters of pool opening - Schedule BOD & Finance Committee meeting re: Budget Meeting, May 25, 7:00 PM - Obtain Reserve Study update from consultant.	- Schedule paint / trim repair Preliminary budget and Reserve Study to Board For June 23rd 3:00 PM - Grind Sidewalk Trip Hazards - Approve final budget Meeting June 22, @3:00
July	August	September
- Begin Common Area improvements - Request gutter cleaning bids Board Meeting July 27, 7pm- - Check on Red Curb Painting - Obtain bids and contractual changes for the upcoming Operating Budget	- Obtain contract renewals for upcoming year - Produce DRAFT budget at Board Meeting on the 27th Send Owners Budget packet no earlier than the 1ST & no later than the 15TH. Board Meeting August 24, 3:00 pm - Appoint Nominating Committee for upcoming election - Mail Call For Candidates - Obtain Insurance Bids	- Notify Pool Contractor of Pool Closing date - Obtain insurance bids for Board review - Schedule fall landscape walk-through with landscaper Board Meeting Sept. 28, 7:00 pm - Deadline for receiving Candidate Nominations - Review Candidates, determine if ballots go out. 2 seats are up for election
October	November	December
- Close Pools – store pool furniture - Meet Your Candidates Night, Meeting, Oct. 26, 3:00 - Insurance Renewals	- Check/clean storm drains for blockage - Clean filters on A/C Heating in Clubhouse Annual Meeting, Nov. 9, 7:00 PM - Nov. 15th, Notify Residents of Results of Election - First gutter cleaning by November 21, 2011	- No Board Meeting - Happy Holidays!

COMMUNITY. INSIGHT. ASSOCIA.

**Developed by industry professionals.
Designed for association board members.**

For nearly 40 years, Associa has been the partner of choice for some of the most complex, innovative and amenity-rich properties in the world. Our best-in-class technology, products and services are designed to add value to your community. And, you'll find that nobody has the expertise we have when it comes to helping you achieve your community's goals. Because of our commitment to community, we've become an industry leader, uniquely positioned to provide actionable insights that deliver results for our client communities.

WHAT REALLY DIFFERENTIATES US, THOUGH, IS OUR PEOPLE. With an A+ BBB rating and nearly 300 employees holding their PCAM® – the highest professional recognition available to community association managers – you can trust that your Associa team has the knowledge and resources to help your community plan, manage, maintain and grow. From our community managers and service partners to our financial professionals, executives and many more, we are committed to helping you achieve your community's vision.

[CLICK HERE TO REQUEST A PROPOSAL!](#)

