

END/BEGINNING-OF-YEAR CHECKLISTS

END OF YEAR (If Annual Meeting happens at the beginning of year, complete the below after the meeting is over. Some items can be done beforehand)

APPFOLIO – BOARD & GOVERNANCE

- Update Board Members, Titles, AND TERMS. See Board Member Management in AppFolio or manual

Confirm all approved:

- Board Meeting Minutes in Shared Documents
- Member Meeting Minutes in Shared Documents
- Meeting packets in Shared Documents
- Required governance documents are uploaded under Shared Documents
- Financials Folder is current. Short & Long Financials are in the correct locations. Owners vs. BOD.

Ensure below and more are uploaded and visible where required:

- Policies
- Procedures
- Governing documents
- Charters are uploaded and visible where required

Meetings & Calendar

- Update Office Closures for the year (holiday schedule)
- Ensure upcoming Board & Member Meetings are entered into the AppFolio calendar with Google Links. When packets are created, upload as well here. Your meeting schedule would have been presented at the BOD ORG meeting.

Annual Budget & Notices

- Notice of Approval: Send notice of approved budget when the budget is approved. *Time Sensitive*. Go to How To for more information.
- Set Up Reminders closer to year of the approval
- Create your Projects list in AppFolio to ensure budgeted funds are untouched. Go over How To for more information

DBPR (Post Election Set Up)

- Send BOD Certification & Education Requirement emails. Use How To for guide etc
- Collect and save all certificates:
 - Proper format
 - Upload to Correct Drive & AppFolio

Send in one email the following:

- Send updated DBPR FAQs to Tizi
- Send Board Roster to Tizi:
 - Name & Position, Email & Phone Number
- Send Date of last Reserve and/or SIRS with attachment and when it was shared to membership.
- Any SPA's past year or upcoming, amounts and for what.

GOOGLE (EMAIL, DRIVE, CALENDARS)

- Update BOD Email Groups
- Update Core Committee Email Groups
- Confirm meetings:
 - Are on your calendar
 - Are added to Patty's calendar
 - Include Kyle as a guest
- Update Community FAQs:
 - Dues
 - Deadlines
 - Community + DBPR FAQs

BEGINNING OF YEAR- BY JANUARY 31

SUNBIZ

- Confirm accuracy immediately after elections including Terms. Ensure your minutes note motions, terms and positions
- Update Board Members & Officer Positions and other relevant information such as mailing address and registered agent. Go to How to for more information

GOOGLE (EMAIL, DRIVE, CALENDARS)

- Update Contracts Spreadsheet:
 - Verify services, frequency, expiration dates
 - Spreadsheet must live in Manager's Folder
 - This review is critical for budget season (June/July)
- Update Action List:
 - Annual goals from reserve study
 - BOD internal goals
 - Projects for the year
 - Action list must live in Manager's Folder
- Set your calendar for notifications for your communities annual meetings. Not just a date. Ex:
 - Set up reminders 90 days, 60 days and 30 days in advance. This also includes early prep for the Annual Budget season which starts in July. Go to How to for more info
 - DO Not wait until the last minute.
 - DO Not mail items at the deadline
 - Ensure your regular meetings are set up. Part of the end of year but no later than 01/31.

NOTICES & REMINDERS

- Send Reminders of dues and approved budget
- Send Reminder of any rules changes or processes that are continuing or set in place for the new year

OTHER / COMMUNITY WEBSITES

- Update community website with and if applicable:
 - Current Board Members
 - Committees
 - Meeting schedule for the year
 - Any information owners expect to see