

Annual HOA Board Calendar

A year-at-a-glance planning framework for recurring board, financial, insurance, maintenance, and governance work.

Your association may have different fiscal dates, climate needs, contracts, and legal deadlines. Use this as a planning framework and customize it to the property.

JANUARY

- ☐ Confirm new-year assessment schedule and budget
- ☐ Review owner balances after year-end
- ☐ Issue annual calendar / board meeting dates
- ☐ Confirm snow/ice response and winter emergency contacts

FEBRUARY

- ☐ Review prior-year financial close progress
- ☐ Check insurance and contract renewal calendar
- ☐ Review spring project/bid needs before vendor schedules fill

MARCH

- ☐ Plan spring roof, masonry, drainage, landscaping, and exterior inspections
- ☐ Update preventive-maintenance list
- ☐ Review major summer projects and funding

APRIL

- ☐ Confirm landscaping/startup work
- ☐ Inspect drainage, gutters, roofs, common exteriors
- ☐ Prepare annual meeting/election work if applicable

MAY

- ☐ Review year-to-date budget versus actual
- ☐ Confirm summer project schedules and owner notices
- ☐ Review vendor performance

JUNE

- ☐ Mid-year open-project review
- ☐ Check reserve/capital plan against actual building needs
- ☐ Review collections and delinquency trends

JULY

- ☐ Begin preliminary next-year budget assumptions

- ☐ Review insurance renewal timing and underwriting needs
- ☐ Plan fall/winter maintenance bids

AUGUST

- ☐ Budget planning and vendor pricing
- ☐ Confirm reserve contribution needs
- ☐ Review upcoming contract renewals/termination dates

SEPTEMBER

- ☐ Draft next-year budget
- ☐ Review insurance proposals/renewal if calendar requires
- ☐ Schedule fall inspections, gutters, heating, winter prep

OCTOBER

- ☐ Finalize budget and assessment decisions on required timeline
- ☐ Confirm snow/ice contracts and winter vendors
- ☐ Review emergency procedures and shutoff information

NOVEMBER

- ☐ Communicate next-year assessments/budget
- ☐ Review open projects before year-end
- ☐ Confirm holiday/office/payment schedules

DECEMBER

- ☐ Year-end invoice and records cleanup
- ☐ Confirm required filings/tax/accounting handoff
- ☐ Archive approved minutes, contracts, insurance, and project closeouts
- ☐ Carry unfinished action items into next year with owners and deadlines

PROPERTY-SPECIFIC DATES TO ADD

Have one issue your board wants to sort out? Bring it to PRG in a free 30-minute Board Problem-Solving Session.

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