

JANUARY (Updated 1/3/2024)

Finish Final Report and have available at Annual Meeting Date _____
Finish Scanning 4th Quarter documents from previous year for final report (See Final Report Checklist) Date _____
ANNUAL MEETING (First Tuesday in January) and SPECIAL MEETING Date _____ <input type="checkbox"/> Secretary prepares Minutes/Board reviews/Email to Owners (hard copy for non email residents) Date _____ <input type="checkbox"/> Secretary summarizes Minutes for Summary of Historical HOA document Date _____ <input type="checkbox"/> Change Entrance Sign to NEW YEAR/DUES after meeting Date _____
SPECIAL MEETING: <input type="checkbox"/> Informal Meet with Board after Annual Meeting or Elections in January to decide on board positions <input type="checkbox"/> Board members read Governing Documents, Annual Rotating Documents, Day-to-Day Duties, Task List, Job Descriptions and sign Oaths (save electronically) <input type="checkbox"/> Create NEW Job Description <input type="checkbox"/> Plan Meeting dates for all Quarterly Meetings, Budget Meeting (October)--April-July-October-December <input type="checkbox"/> Plan Newsletter dates for all quarters--April-July-October-December <input type="checkbox"/> Plan and attend meetings with Committees <input type="checkbox"/> New Treasurer to review Article 6.03, 6.04 <input type="checkbox"/> ACC members review Article 8, also 3 and 7 <input type="checkbox"/> Welcome Packet updated (if needed, last update 2023) <input type="checkbox"/> Directory committee formed (if needed, last done 2021)
Update Info on <input type="checkbox"/> Website, <input type="checkbox"/> Forwarding Emails, <input type="checkbox"/> Newsletter Template <input type="checkbox"/> Organizational Chart (New Board members, Treasurer, Secretary, ACC Members, Welcome Committee, Other)
Change Signature Card at Bank With Treasurer (if new President) <input type="checkbox"/> Coordinate with Treasurer, Incoming President and Outgoing President. <input type="checkbox"/> Bring Annual Meeting Minutes that discuss the results of the Election and the announcement of the new president. <input type="checkbox"/> Each person needs to show Driver's License.
President passes PO Box key to incoming president (Box 66018 at Richard Pino Station)--Treasurer also holds a key.
President passes Admin Binders, blueprints, flashdrives, Plat To NEW PRESIDENT
Collects dues from 100 homeowners. --Treasurer collects and deposits -- Due February 1
Change Entrance Sign to INVOICES WERE SENT--DUES ARE DUE Mid January Date _____
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.

FEBRUARY

Due are Due February 1 -- 10 Day grace period February 3 - First Warning [Informing that they are in the grace period] February 12 Second Warning - \$20 Charged [Additional Assessment (Dues Collected)] March 1 Third Warning - Notification that Interest is now being charged beginning February 2. April 1 , and subsequent months with interest continuing <input type="checkbox"/> Change Entrance Sign to WINTER after Dues are collected Date _____
Treasurer prepares Income Statement and Balance Sheet from previous year for Federal and State taxes Filed by Treasurer with President signatures. IRS form 1120-H, NM CIT-1 --- H&R Block
Treasurer pays State Farm Insurance Bill <input type="checkbox"/> Request an electronic file of the policy Date _____
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Address any Comments or Complaints from homeowners as needed.

Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
MARCH
Send Notice of 1st Quarter Meeting (In April) <input type="checkbox"/> Prepare Agenda Date _____ <input type="checkbox"/> Circulate to Board Members for input before meeting for input. <input type="checkbox"/> Email agenda and Zoom link or location of Meeting (hard copy for non email residents) Date _____ <input type="checkbox"/> Post BOARD MEETING Message in Entrance Sign Date _____ <input type="checkbox"/> Discussion for CD Renewal happens at this meeting in 2024 (was last renewed in November 2022 for 18 months) <input type="checkbox"/> Renews in May 2024 Review CD Interest Rate at Bank (needs Board approval)
Mid-late-March Date _____ <input type="checkbox"/> Text Yellowstone Landscape and remind him that per our contract the Spray Crew should be coming in March/April (depending on weather). Main Contact - Mike Beard- See Yellowstone INFO <input type="checkbox"/> Secure date with him and email residents so they can protect their pets. <input type="checkbox"/> Text him a picture of Pre-Emergent Areas Highlighted.pdf <input type="checkbox"/> Some residents may want to also be serviced by Yellowstone...ask for special pricing. They did not offer Special pricing in 2023.
<input type="checkbox"/> Update Corporations and Business Services (new Board Members) with NM SOS -Coordinate with Treasurer when Fee is paid in March. Date _____ <input type="checkbox"/> Treasurer pays Secretary of State to renew Domestic NonProfit Corporation Filing Fee (Annual Report) <input type="checkbox"/> Download receipt and Certificate from SOS Portal, Scan and file Date _____
Review Landscape Checklist Board member walk property and review on THURSDAYS . Contact Yellowstone Landscape if necessary <input type="checkbox"/> Also check that Spray Crew sprayed all areas within contract
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Neighborhood Directory <input type="checkbox"/> Make committee, design, print and deliver Last done: September 2023 ----Done every 2 years? Depending on amount of owner changes
Social Committee <input type="checkbox"/> Solicit Volunteers <input type="checkbox"/> Plan Block Party <input type="checkbox"/> Plan 'Driveway Socials' for April -Oct
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.
APRIL
1st QUARTER MEETING Date _____ <input type="checkbox"/> Secretary prepares Minutes/Board reviews/Email to Owners (hard copy for non email residents) Date _____ <input type="checkbox"/> Secretary summarizes Minutes for Summary of Historical HOA document Date _____ <input type="checkbox"/> Change Entrance Sign to SPRING Date _____
Solicit items for 1st Quarter Newsletter President, Treasurer (Income statement and Balance Sheet), ACC, Welcome Committee, Directory, Other
1st Quarterly Newsletter <input type="checkbox"/> Prepared by Secretary Date _____ <input type="checkbox"/> Reviewed by Board Date _____ <input type="checkbox"/> Emailed to residents (hard copy for non email residents) Date _____
Check with CABQ about Green Waste Pickup and put in April Newsletter https://www.cabq.gov/solidwaste/green-waste
Board Walk Arounds --Once per week, Board walks neighborhood, addressing violations--Knock on doors, or take pictures and email residents
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Solicit Quotes for CPA -Approve at 2nd Quarter Board Meeting Date _____ Compilation done every 3 years - last done in 2021 for 2020 Calendar Year Due next: 2024 for 2023 Calendar Year---2027 for 2026 Calendar Year

Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NMAR Form 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.
Scan 1st Quarter documents for final report (See Final Report Checklist) Date _____
MAY
Board Walk Arouns --Once per week, Board walks neighborhood, addressing violations--Knock on doors, or take pictures and email residents
Solicit Quotes for CPA (every 3 years- last done in 2021) Date _____ Continue to collect and prepare quotes for 2nd quarterly meeting
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
Treasurer renews CD at Bank Date _____ Approved by Board via email Date _____ Renews CD 2024
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.
JUNE
Send Notice of 2nd Quarter Meeting (In July) Date _____ <input type="checkbox"/> Prepare Agenda Date _____ <input type="checkbox"/> Circulate to Board Members for input before meeting for input. <input type="checkbox"/> Email agenda and Zoom link or location of Meeting (hard copy for non email residents) Date _____ <input type="checkbox"/> Post BOARD MEETING Message in Entrance Sign Date _____
Board Walk Arouns --Once per week, Board walks neighborhood, addressing violations--Knock on doors, or take pictures and email residents
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
Renew Post Office Box --Treasurer Date _____
Renew Domain Name and Hosting Service -- Webmaster: Mona Belchak Date _____
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.
JULY
2nd QUARTER MEETING Date _____ <input type="checkbox"/> Secretary prepares Minutes/Board reviews/Email to Owners (hard copy for non email residents) Date _____ <input type="checkbox"/> Secretary summarizes Minutes for Summary of Historical HOA document Date _____ <input type="checkbox"/> Change Entrance Sign to SUMMER Date _____ <input type="checkbox"/> Acquire and approve CPA every 3 years - last done in 2021 Date _____
Solicit items for 2nd Quarter Newsletter President, Treasurer (Income statement and Balance Sheet), ACC, Welcome Committee, Directory, Other
2nd Quarterly Newsletter <input type="checkbox"/> Prepared by Secretary Date _____ <input type="checkbox"/> Reviewed by Board Date _____ <input type="checkbox"/> Emailed to residents (hard copy for non email residents) Date _____
Treasurer pays City of ABQ for Right Of Way Permit B12-001 ---NO INVOICE CAME IN 2023!
Hire CPA for Compilation -- 2024 for 2023 year--2027 for 2026 year <input type="checkbox"/> Gather prior year's Bank Statements with Treasurer Date _____ <input type="checkbox"/> Gather last years Financials from Treasurer Date _____ <input type="checkbox"/> Update Website Date _____

<input type="checkbox"/> Solicit volunteers, plan and register for National Night Out with APD-First Tuesday in August Date _____ https://www.cabq.gov/national-night-out <input type="checkbox"/> Change Entrance Sign to National Night Out Date _____
<input checked="" type="checkbox"/> Plan National Night Out - https://www.cabq.gov/national-night-out <input type="checkbox"/> Change Entrance Sign to Summer Date _____
Board Walk Arouds --Once per week, Board walks neighborhood, addressing violations--Knock on doors, or take pictures and email residents
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.
<input type="checkbox"/> Review Landscape Contract - Yellowstone --It Renews in August Date _____ <input type="checkbox"/> Be ready to Sign New Contract Date _____
Scan 2nd Quarter documents for final report (See Final Report Checklist) Date _____
AUGUST
Board Walk Arouds --Once per week, Board walks neighborhood, addressing violations--Knock on doors, or take pictures and email residents
National Night Out - https://www.cabq.gov/national-night-out Date _____
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
<input type="checkbox"/> Renew of Landscape Company - Yellowstone - Date _____ <input type="checkbox"/> Sign Contract Date _____ <input type="checkbox"/> Upload Contract to Website Date _____
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.
SEPTEMBER
Send Notice of 3rd Quarter Meeting (in October) Date _____ <input type="checkbox"/> DUES FOR NEXT YEAR and BUDGET ARE DISCUSSED AT THIS MEETING <input type="checkbox"/> Prepare a tentative operating budget for next year (bylaws 6.06) Date _____ <input type="checkbox"/> Decide on Maintenance Assessment (Dues) for next year Date _____ <input type="checkbox"/> Prepare Agenda Date _____ <input type="checkbox"/> Circulate to Board Members for input before meeting for input. <input type="checkbox"/> Post BOARD MEETING Message in Entrance Sign Date _____ <input type="checkbox"/> Email agenda and Zoom link or location of Meeting (hard copy for non email residents) Date _____
Board Walk Arouds --Once per week, Board walks neighborhood, addressing violations--Knock on doors, or take pictures and email residents
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.
OCTOBER
3rd QUARTER MEETING Date _____ <input type="checkbox"/> Secretary prepares Minutes/Board reviews/Email to Owners (hard copy for non email residents) Date _____ <input type="checkbox"/> Secretary summarizes Minutes for Summary of Historical HOA document Date _____ <input type="checkbox"/> Change Entrance Sign to FALL Date _____

Solicit items for 3rd Quarter Newsletter President, Treasurer (Income statement and Balance Sheet), ACC, Welcome Committee, Directory, Other
3rd Quarterly Newsletter <input type="checkbox"/> Prepared by Secretary Date _____ <input type="checkbox"/> Reviewed by Board Date _____ <input type="checkbox"/> Emailed to residents (hard copy for non email residents) Date _____
Check with CABQ about Green Waste Pickup and put in October Newsletter https://www.cabq.gov/solidwaste/green-waste
Draft Dues letter with Treasurer. Prepare for December.
Solicit for new Board Members, Volunteers Board Members serve a 2 year term Two open in 2025 - every 2 years** One open in 2026 - every 2 years
Board Walk Arouds --Once per week, Board walks neighborhood, addressing violations--Knock on doors, or take pictures and email residents
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.
Scan 3rd Quarter documents for final report (See Final Report Checklist) Date _____
NOVEMBER
Send Notice of 4th Quarter Meeting (in December) Date _____ <input type="checkbox"/> Prepare Agenda Date _____ <input type="checkbox"/> Circulate to Board Members for input before meeting for input. <input type="checkbox"/> Post BOARD MEETING Message in Entrance Sign Date _____ <input type="checkbox"/> Email agenda and Zoom link or location of Meeting (hard copy for non email residents) Date _____
Solicit for new Board Members, Volunteers Board Members serve a 2 year term. Two open in 2025 - every 2 years** One open in 2026 - every 2 years
Review Landscape Checklist Board member walk property and reviews on THURSDAYS , Contact Yellowstone Landscape if necessary
Treasurer pays Landscape Company
Treasurer Reconciles Bank Accounts
Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700
Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box
Address any Comments or Complaints from homeowners as needed.
DECEMBER
Prepare for Election at Annual Meeting during 4th Quarter Meeting
4th QUARTER MEETING Date _____ <input type="checkbox"/> Secretary prepares Minutes/Board reviews/Email to Owners (hard copy for non email residents) Date _____ <input type="checkbox"/> Secretary summarizes Minutes for Summary of Historical HOA document Date _____ <input type="checkbox"/> Change Entrance Sign to CHRISTMAS Date _____
Solicit items for 4th Quarter Newsletter President, Treasurer (Income statement and Balance Sheet), ACC, Welcome Committee, Directory, Other
4th Quarterly Newsletter <input type="checkbox"/> Prepared by Secretary Date _____ <input type="checkbox"/> Reviewed by Board Date _____ <input type="checkbox"/> Emailed to residents (hard copy for non email residents) Date _____

<p>Send Notice of ANNUAL Meeting (first Tuesday in Jan.) by <u>December 15</u></p> <p><input type="checkbox"/> Prepare Agenda Date _____</p> <p><input type="checkbox"/> Circulate to Board Members for input before meeting for input.</p> <p><input type="checkbox"/> Email agenda and Zoom link or location of Meeting (hard copy for non email residents) Date _____</p> <p><input type="checkbox"/> Post ANNUAL MEETING Message in Entrance Sign Date _____</p> <p><input type="checkbox"/> Solicit Volunteers for Board Position(s)</p> <p><input type="checkbox"/> Election?</p>
<p>Prepare FINAL REPORT--To be ready for ANNUAL Meeting in January--See Final Report Checklist</p>
<p>Dues Invoices--Email on December 31. --Dues are due on February 1</p>
<p>Treasurer pays Landscape Company</p>
<p>Review Landscape Checklist Board member walk property and reviews on THURSDAYS, Contact Yellowstone Landscape if necessary</p>
<p>Treasurer Reconciles Bank Accounts</p>
<p>Communicate with Title Companies as needed for any selling property. Ensure new Buyer signs PGHOA Disclosure Form acknowledging HOA, Bylaws, RCCs (Article 3, 7 and 8), Treasurer fills out NM 4700</p>
<p>Treasurer checks USPS mailbox. Emails come to President via USPS Informed Delivery to notify us of mail in box</p>
<p>Address any Comments or Complaints from homeowners as needed.</p>
<p>Begin scanning 4th Quarter documents for final report (See Final Report Checklist) Date _____</p>