

**Annual Management Plan
Deerlake Village Community Association Board Of Directors**

The Deerlake Village Community is located in the City of Brevard and lies in the Western North Carolina County of Transylvania. Located in the Blue Ridge Mountain chain at an elevation of about 2280 feet, the community consists of approximately 220 private homes and 20 condominiums. It includes a Conservancy area of approximately 38 acres, which include a private lake and a series of private walking trails. Its common areas include a lap-type swimming pool, a clubhouse, a picnic/recreation area, and a number of park-like areas.

January

- ❖ **Fiscal year runs with the calendar year**
- ❖ **Board work sessions held as required**
- ❖ ***First week*** Assessments mailed out. May consider enclosing President's form letter to homeowners who rent their property. (Note: If a property becomes a new rental at any other time during the year, this letter may be sent at that time also.)
- ❖ ***Second Week*** Draw up Request For Quote (RFQ) for Grounds Maintenance Contract (if optional year negotiate second year escalation costs) and mail out to possible bidders if required)
- ❖ ***Second Week*** Draw up an RFQ for Gardening Services Contract (if optional year, negotiate second year escalation costs) and mail out to possible bidders if required.
- ❖ ***Second Week*** Draw up RFQ for Pool Maintenance Contract (negotiate escalation if optional year of existing contract) and mail out to possible bidders.
- ❖ ***Second Week Deerlake Diary*** Update to be submitted by Board president by 15th of month.
- ❖ ***Third Week*** Review financial report for previous month.

February

- ❖ **Board work sessions held as required.**
- ❖ ***First Week*** Board meets with Committee Chairs to review roles, responsibilities, and budgets.
- ❖ ***Second Week Deerlake Diary*** articles to be submitted including President's Update" by 15th of month.
- ❖ ***Second Week*** If assessment payment(s) have not been received by February 15, a second notice will be sent.
- ❖ ***Third Week*** Review financial report for previous month.

March

- ❖ **Board work sessions held as required**
- ❖ ***First Week*** Board begins preparation for Q1 meeting.
- ❖ ***Second Week*** Pool, Maintenance, and LRC Committees to Review RFQ Submissions
- ❖ ***Second Week Deerlake Diary*** Update to be submitted by Board president by 15th of month.
- ❖ ***Third Week*** Review financial report for previous month.
- ❖ ***Third Week*** File and pay Federal and State Income Taxes before March 15.
- ❖ ***Third Week*** Pool, Maintenance, and LRC Committees to make recommendations to the Board as to the contractors for this year.
- ❖ ***Third Week*** Board to approve Pool Contract
- ❖ ***Fourth Week*** Approve Gardening Contract.
- ❖ ***Fourth Week*** Approve Grounds Contract
- ❖ ***Fourth week*** If assessment payment(s) are not received by March 31, a final notice will be sent and the owner fined a \$50 late fee per lot.
- ❖ ***As scheduled*** First Quarterly Meeting with Community at Deerlake Clubhouse

April

- ❖ **Board work sessions held as required**
- ❖ ***Second Week Deerlake Diary*** Update to be submitted by Board president by 15th of month.
- ❖ ***Second Week*** Maintenance Committee inspects irrigation system.
- ❖ ***Second Week*** Secretary makes initial contact with Anna Yount at Transylvania Co. Library to schedule annual meeting

- ❖ *Third Week* Review financial report for previous month.
- ❖ *Second or Third Week* If full payment of assessment(s) is not made by April 14, collection will be turned over to our attorney.
- ❖ *Third Week* Inspect pool equipment and schedule pool opening and necessary preventive maintenance (Pool Committee and Maintenance Contractor).
- ❖ *Third Week* Grounds Contract starts.
- ❖ *Third Week* Gardening Contract starts.

May

- ❖ **Board work sessions held as required**
- ❖ *First Week* Submit pool application and fee to County Health Dept. and request inspection date.
- ❖ *Second Week* *Deerlake Diary* Update to be submitted by Board president by 15th of month.
- ❖ *Third Week* Review financial report for previous month.
- ❖ *Fourth Week* Pool Opens.
- ❖ *Fourth Week* Draw up an RFQ for Janitorial Services Contract (if optional year, negotiate second year escalation costs) and mail out to possible bidders if required.

June

- ❖ **Board work sessions held as required**
- ❖ **Biennial Community Garage Sale** (odd numbered years)
- ❖ *First Week* Board begins preparation for Q2 meeting.
- ❖ *Second Week* Secretary finalizes plans (forms and deposit) with Aaron Baker at Transylvania Co. Library to schedule annual meeting
- ❖ *Second Week* *Deerlake Diary* Update to be submitted by Board president by 15th of month.
- ❖ *Second or Third Week* Review financial report for previous month.
- ❖ *Second or Third Week* Board appoints a member of the Board to chair the Nominating Committee.
- ❖ *As scheduled* **Second Quarterly Meeting with Community at Deerlake Clubhouse**

July

- ❖ **Board work sessions held as required**
- ❖ *First Week* Clubhouse Janitorial Contract prepared and submitted for bids.
- ❖ *Second Week* *Deerlake Diary* Update to be submitted by Board president by 15th of month. In either the President's Update or in an article by the Nominating Committee Chair, the community will be advised of the upcoming December election, the October 1 application deadline, the number of positions to be filled as well as the qualifications for Board Directors.
- ❖ *Anytime* Annual Community Conversation with the Mayor
- ❖ *Second or Third Week* Review financial report for previous month.
- ❖ *Second or Third Week* The Chair of the Nominating Committee will recommend committee members for Board approval. The Board will appoint members of the Nominating Committee.
- ❖ *Fourth Week* Clubhouse Janitorial Contract finalized
- ❖ *Fourth Week* Nominating Committee will hold an organizational meeting. Members will be provided a copy of the Charter and relevant portions of the Annual Management Plan.

August

- ❖ **Board work sessions held as required**
- ❖ *First Week* Treasurer will email committee chairs re: next year's budget requests, due 8/15.
- ❖ *Second Week* *Deerlake Diary* Update to be submitted by Board president by 15th of month.
- ❖ *Second Week* A *Deerlake Diary* article will be submitted by the Chair of the Nominating Committee announcing members of the Committee, defining the annual election, describing open positions on the Board of Directors, and requesting volunteers with guidelines for potential candidates. The Nominating Committee begins the work of identifying potential candidates.
- ❖ *Second or Third Week* Review financial report for previous month
- ❖ *Third Week* Finance Committee reviews budget requests.

September

- ❖ **Board work sessions held as required**
- ❖ *First Week* Board begins preparation for Q3 meeting.

- ❖ *First Week* Finance Committee completes a first pass of the budget and sends it on to the Board.
- ❖ *First Week* The Board makes first review of budget; recommendations go back to committees.
- ❖ *Second Week Deerlake Diary* Update to be submitted by Board president by 15th of month. Community is reminded of the October 1 deadline for candidates' applications.
- ❖ *Second Week* Potential candidates are given/sent a welcome letter and application form (due October 1), and the Nominating Committee shall report progress to the Board.
- ❖ *Second or Third Week* Review financial report for previous month.
- ❖ *As scheduled* **Third Quarterly Meeting with Community at Deerlake Clubhouse**

October

- ❖ **Board work sessions held as required**
- ❖ *First Week* Review coverage and solicit insurance bids if required.
- ❖ *First Week* Board begins preparation for Annual Meeting.
 - Board completes second review of budget in consultation with the Finance Committee.
 - The Nominating Committee plans a format and schedules interviews with each candidate, then shall recommend a slate of candidates to the Board.
- ❖ *Second Week Deerlake Diary* Update to be submitted by Board president by 15th of month.
- ❖ *Second Week* Board continues preparation for Annual Meeting.
 - Final review of budget
 - The Board approves a slate of candidates.
 - The Chair of the Nominating Committee notifies candidates of nomination.
- ❖ *Second or Third Week* Review financial report for previous month.
- ❖ *Third Week* Treasurer prepares final budget for Board approval.
- ❖ *Third Week* After Board approval, the chair of the Nominating Committee notifies all potential nominees of the results.

November

- ❖ **Board work sessions held as required**
- ❖ *First Week* Nominating Committee Chair writes a "Candidate's Bio" for each candidate chosen based on the application received, and prepares a ballot. (Candidates should be given the opportunity to review and approve the bio before printing.)
- ❖ *First or Second Week* The treasurer must notify all budget holders that all invoices must be submitted by the third week in December so that bills are paid in the current budget year. A reminder should be sent in December.
- ❖ *Second Week Deerlake Diary* Update to be submitted by Board president by 15th of month.
- ❖ *Second Week* Board approves final budget and nominees for Directors' positions. Budget, slate of candidates (with bios and ballot) and Annual Reports are mailed to members.
- ❖ *Second or Third Week* Review financial report for previous month.

December

- ❖ **Board work sessions held as required**
- ❖ *Second Week Deerlake Diary* Update to be submitted by Board president by 15th of month.
- ❖ *Second Week* The treasurer will remind all budget holders that all invoices must be submitted by the third week in December so that bills are paid in the current budget year.
- ❖ *Second or Third Week* Review financial report for previous month.
- ❖ *As scheduled* **Annual Meeting with Community at Transylvania Community Library**
 - Work session convened at clubhouse immediately after to
 - Elect Board officers
 - Set DVCA calendar of Quarterly and Annual Meetings
- ❖ *Soon after Annual Meeting and election of officers* signature cards for bank accounts must be updated.

NOTE: The DVCA maintains contracts with the two homeowners' associations of the condominiums, Eagle Run and Quail Run. The contracts run for a ten-year time period and were renegotiated and finalized in November 2010. They will be due for review in 2020.