



# 2027 Development Budget Timeline

CAPEX- Capital Expenditure Greater than \$5,000 + 3 years or more lifetime

FC- Finance Committee BOD-P- BoD President Jeannine Grippo

BOD-AT -BoD Assistant Treasurer Joe Stejskal COO- Chief Operating Officer Darren Shaw

DOF- Director of Finance Terry Dempsey

Date	Item	Who
6/1/2026	Staff/ Residents /Clubs CAPEX/Reserves/CIF budget request forms <b>OPEN</b> <a href="http://sbhoa2.org/budget-request">sbhoa2.org/budget-request</a>	Staff/Residents/ Clubs
6/30/2026	Staff/ Residents /Clubs CAPEX/Reserves/CIF budget request forms <b>DUE</b>	Staff/Residents/ Clubs
7/10/2026	CAPEX/Reserves/CIF Budget Request Summary due to FC & BOD	Staff
7/24/2026	2026 REFORECAST based on June YTD Due to DOF	Staff
7/31/2026	2027 Budget Draft #1; Director Narratives; 5-year plan due to COO and DOF	Staff
8/3/2026	<b>PUBLIC CAPEX MEETING</b> Special Finance Committee Open meeting; CAPEX Presentations	FC/ Staff/ Residents/ Clubs
8/5/2026 8/6/2026 8/7/2026	<b>Internal Departmental Meetings</b> with COO and DOF on 2027 Budget	Staff/COO BOD-P/BOD-AT
8/21/2026	Review Draft #1 of 2027 Budget, Director Budget Narratives, 5-year plan completed by COO and DOF	Staff
8/27/2026	Draft #1 of 2027 Budget, Director Budget Narratives, 5-year plan due to FC	Staff
9/17/2026	<b>PUBLIC MEETING</b> Presentation of 2027 Budget Draft #1; Director Narratives; 5-year plan	Staff/FC
9/30/2026	Recommended changes from FC to DOF <b>DUE</b>	FC
10/8/2026	Draft #2 of 2027 Budget; Director Narratives; 5-year plan; due to FC	Staff
11/20/2026	<b>PUBLIC SPECIAL BOARD MEETING</b> Board Votes on 2027 budget, 5-year plan and CAPEX for 2027	Board
December 2026	Final Budget is Posted to Website	Staff