

# Policy and Procedures for the Welcoming Committee

## **POLICY:**

The purpose of this committee is to welcome all new homeowners into the Crane Lakes community and inform them of all the amenities available to them. Committee members consist of a Committee Chairperson and 2-3 additional committee members.

## **PROCEDURES:**

### **Committee Chair – Monthly Responsibilities:**

- Contact the management office to obtain phone numbers for each new homeowner listed in the monthly Crane Lakes Courier.
- Email committee members the breakdown on new homeowners' visits. Include name, address, lot number, and phone number for each new resident.
- Prepare Welcome Kits for all visits. Print any additional documents needed at Ponce Inlet Printing (Mary Racila).
- Upon completion of all new homeowner Welcome Visits, submit the completed Complimentary Membership forms to the Membership Chair.
- At the end of each month, email a report of all visits made to the HOA President and copy the Membership Chair; Welcoming Committee Liaison; and Director of the weekly email Blast. Include names, addresses, lot numbers, email addresses, and phone numbers for all new homeowners listed in the report.
- Prepare and give a report at the monthly HOA Informational meeting. The report should include the total number of visits completed for the month; year-to-date backlog of visits; and upcoming visits listed in the new monthly Courier. The report may also include any concerns or issues of the Committee.
- All expenditures must be approved by the HOA Board followed by an Expense Report submitted to the Treasurer for reimbursement.

### **Committee Chair - Yearly Responsibilities:**

- Work with members of the Committee to host one or two Meet and Greet events.
- Review Welcome Kit documents for revisions and updates.

### **Committee Members' Responsibilities:**

- Visit new homeowners and review the documents in the Welcome Kit.
- Complete the HOA Complimentary Membership form and the New Resident Information form during the visit. Following the home visit, submit both forms to the Committee Chair. Leave all other documents with the new resident.

### **NOTE:**

Complimentary membership starts at the time of the Welcome visit for that current year. For any visits made in October through December, the new residents will receive complimentary membership for the current year (October-December) and the following calendar year.

Notify the Committee Chair of any concerns, questions, or delays in completing the welcome visit assignment.

When possible, attend monthly HOA Information meetings and be available for any committee meetings set up by the Committee Chair.