

Florida Community Association

AFE Project Proposal Form

For Fiscal Year _____

PRODUCTION READY BLANK TEMPLATE — SIRS / TRS PROJECT

Project Information

Project ID	SIRS- _____ or TRS- _____
Project Name / Description	[Enter project name or brief description]
Recommended By	[Enter name and title]
Prepared By	[Enter name and title]
Date Prepared	[Enter date prepared]
Board Meeting Date	[Enter Board meeting date]
Fiscal Year	FY _____ – _____

Reserve Classification

Fund	Select Fund ▼
Action	Select Action ▼
Reserve Category	
Reserve Component / SIRS Scope	Select SIRS Component / Scope ▼
Project Type	Select Project Type ▼
Building Permit / Code Review	Select Permit / Code Review ▼
Engineering / Professional Oversight	Select Determination ▼
Work / Change Type (Primary)	Select Work / Change Type ▼

Classification rationale: [State the basis for fund, type, REQUIRED/ELECTIVE status, scope, and selections above.]

Technical-work and permitting screening: confirm Florida Building Code, local building-department, professional, permit, inspection, and other requirements before authorization or commencement. See Guide §5.

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Project Description and Funding

Description of Work	
Recommended Vendor / Contractor	
Estimated / Proposed Cost	\$ _____
Funding Option Recommended	Select Funding Method ▼
Alternatives Considered	
Funding Method Comments	
Proposed Start Date	
Proposed Completion Date	

Itemized Listing of Costs

Item	Cost

Total Bid / Proposed Cost	\$ _____
Reserve Study Cost / Adopted Budget	\$ _____ / \$ _____

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Board Action

Board-Authorized Cost Limit	\$ _____ — not to exceed
SIRS / TRS Funding Method Approved	Select Funding Method ▼
Authorization Conditions / Notes	<i>[Record funding conditions, scope limitations, and any requirement for additional Board approval.]</i>
Board Members Approving	<i>[Enter names or number of directors approving]</i>
Board Members Disapproving	<i>[Enter names or number of directors disapproving]</i>
Board Members Abstaining / Not Present	<i>[Enter abstentions and members not present]</i>
Board Action	<i>[Summarize the motion, scope, funding source, authorized limit, approval date, and minutes reference.]</i>

Project Closeout

Project Status	Select Project Status ▼
Completion Date	<i>[Enter completion or closeout date]</i>
Actual Cost to Date (Open Projects)	\$ _____
Outstanding Commitment (Open Projects)	\$ _____
Final Cost (Completed Projects)	\$ _____
Variance from Board-Authorized Limit	\$ _____ favorable / unfavorable
Closeout Notes	<i>[Summarize completion, final invoices, inspections, warranties, photographs, unresolved items, and records filed.]</i>

Administrative Notes

- REQUIRED means scheduled by the reserve study, required by law or regulation, needed for an emergency repair, or needed to address life-safety; ELECTIVE means not scheduled for the current year and not structural, life-safety, or emergency work.
- Select SIRS or TRS consistently with the current reserve study, applicable Florida law, the Association's governing documents, the adopted budget and supporting schedule, and the Association's accounting structure. Complete the SIRS Scope, Engineering / Professional Oversight, Work / Change Type, and Building Permit / Code Review fields for SIRS projects and for TRS projects involving technical work.
- The Board-authorized amount is the approved contract amount or not-to-exceed limit for a material or nonroutine project. Record the scope, SIRS/TRS funding source, motion or contract authority, approval date, and minutes reference.
- This AFE is a recommended administrative tool, not a form specifically required by statute. Use it, or an equivalent written project-authorization record, for material or nonroutine reserve projects. It is not required for each routine payment made under valid prior authority and does not replace the adopted budget, Board minutes, contracts, invoices, accounting records, inspections, or other official records. Florida law and the Association's governing documents control.