

POLICY SUMMARY

SOP 2.2 — Calendar of Activities

Process Name:	Calendar of Activities
SOP Category:	Resident Retention
SOP Reference:	2.2
Roles Involved:	CC, AM, OSM
Last Updated:	June 2026

1 WHAT OUTCOME CC EXPECTS

- Onsite managers create and implement community building activities at their property.
- At minimum, one resident engagement initiative is executed each quarter.
- Activities strengthen resident connection, satisfaction, and support lease renewal rates.
- Consistent, simple engagement is the priority — not large-scale events.

2 WHAT MUST BE DONE — BY WHO

- **OSM:** Create a Calendar of Activities for the upcoming year, planning at least one engagement initiative per quarter. Use the CIC Resident Engagement Calendar as a guide for themes, activity ideas, and budgets.
- **OSM:** Post the calendar in a designated accessible location as directed by CC. At minimum, the calendar is available at the property and shared with the AM.
- **OSM:** Submit the completed calendar for the following year to the AM by end of Q4.
- **OSM:** Execute at least one activity per quarter and document completion with a brief summary and photo.
- **AM:** Review the calendar during monthly onsite visits to confirm upcoming activities are planned (Pending) and completed activities are documented (Completed).
- **AM:** Share a summary of each property's quarterly activities with CC at the quarterly meeting.

3 WHAT EVIDENCE MUST EXIST

- A completed Calendar of Activities for the year showing at least one planned activity per quarter.
- Calendar posted in a designated accessible location and shared with the AM.
- Calendar for the following year submitted to AM by end of Q4.
- Brief documentation of each completed quarterly activity — summary and photo.

4 HOW THE AM VERIFIES IT

- **AM** reviews the calendar at each monthly onsite visit to confirm at least one activity is planned (Pending) for each of the next 4 quarters.
- **AM** confirms the current quarter's activity has been completed and is documented (Completed).
- **AM** shares a quarterly activity summary for each property with CC at the quarterly meeting.

5 WHAT CC AUDITS

- CC reviews the Calendar of Activities through AM reporting at each quarterly meeting.
- CC confirms that at least one activity per quarter is planned and that completed activities are documented for each property.
- Portfolio-wide engagement activity is tracked quarterly through AM summaries.

Supporting Tools

QRG / Reference: SOP 2.2 — Engagement Calendar QRG (see Google Drive)

Calendar Guide: CIC Resident Engagement Calendar — 2026 Edition

Training Video: [Loom link — add when recorded]

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SOP 2.2 — Defined Terms & Additional Notes

Defined Terms

Calendar of Activities:	A written annual plan created by each OSM showing at least one resident engagement initiative per quarter. Posted in a designated location and submitted to AM by end of Q4 for the following year.
Resident Engagement Initiative:	A community-building activity hosted by the onsite team for residents. Simple, low-cost, and consistent. Minimum one per quarter per the CIC Engagement Calendar framework.
Pending Activity:	A planned engagement initiative on the Calendar of Activities for an upcoming quarter that has not yet been executed.
Completed Activity:	An engagement initiative that has been executed and documented with a brief summary and photo.
CIC Engagement Calendar:	The portfolio-wide reference document providing quarterly themes, monthly activity ideas, and budget guidelines by property size. Used to plan the annual Calendar of Activities.
Quarterly Meeting:	The recurring meeting between AM and CC where AM presents completed and upcoming engagement activities across their properties.

Additional Context / Notes

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Version History

Version	Date	Updated By	Summary of Changes