



## Fountain of the Sun Association (FOSA)

### Budget Request Form

<b>Resident Name</b>		<b>Address</b>	
<b>Group/Club Affiliation</b>		<b>Date</b>	
<b>Phone #</b>		<b>Email Address</b>	

**Describe the proposed project/program and the reason it should be included in the planning and budget of the association.**

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**Provide any information you have, attach additional information if more space is needed.**

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#### **Agreement and Signature**

By signing and submitting this request, I affirm that the facts set forth in it are true and complete. I understand that all requests are subject to the governing documents, policies and procedures of the Fountain of the Sun Association.

Name (printed)	
Signature	
Date	

#### **Our Policy**

It is the policy of Fountain of the Sun Association to provide equal opportunities without regard to race, color, religion, national origin, gender, sexual preference, age, or disability.



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#### AMENDED AND RESTATED BYLAWS OF FOUNTAIN OF THE SUN ASSOCIATION

##### Article 5 Annual Budget Meetings

5.3.1 An Annual Budget Meeting shall be held between September 15 and October 31 for the purpose of reviewing and discussing with the Members the budget for the next calendar year. **Written requests relating to amounts requested for inclusion in the budget on behalf of facilities, amenities, clubs and organizations shall be submitted to the Board by June 1. (Emphasis added)**

#### Budget Request Procedure

1. Complete this form and return it to the FOSA Management office. FOSA Staff will date stamp the form, provide you with a copy and forward the original to the FOSA General Manager (GM).
2. The GM will review the request form to verify all contact information is complete and the FOS resident has signed and dated the request.
3. Based on the information in the request the GM will make a determination to:
  - a. Address the request as a Maintenance/Safety issue that can be addressed in the current operating budget and delegate to the appropriate FOSA staff.
  - b. Refer to the appropriate committee for additional research and information, i.e. Activity, Infrastructure, and Long Range Planning Committee(s).
4. After review the request will be referred to the Finance Committee with the recommendation from referring committee.
5. The Finance Committee will take the matter under consideration for inclusion in the pro forma budget it develops with management and submits to the Board of Directors for review and approval. The Finance Committee will determine if it is an operation, reserve or capital fund expense.
6. Capital improvement projects are subject to the limitations of the FOSA bylaws.

#### AMENDED AND RESTATED BYLAWS OF FOUNTAIN OF THE SUN ASSOCIATION

##### Article 8 BOARD OF DIRECTORS AUTHORITY

###### 8.3 Limitations of the Board of Directors

The Board shall be prohibited from taking the following actions outside of the approved and adopted annual budget without the affirmative vote of a majority of the Members of the Association;

8.3.1.1 Incur a debt for which scheduled payment exceeds one (1) year, on behalf of the Association;

8.3.1.2 Sell or acquire real property, except when exercising a lien on a delinquent account or other charges;

8.3.1.3 Expend funds for capital expansion or additions to facilities; however, these expenditure limits shall not apply to the funds designated and recorded for the FOS Community Improvement Fund