

Experience COMMUNITY Your Way



ONE PARTNER. ONE COMPLETE SOLUTION.

Community living has never been easier.

Meet your neighbors, manage your account, and access the resources you need for better community living, all through one user-friendly app.

Available for FREE to Associa communities, join TownSq now to start experiencing community your way!

- Connect with your neighbors
- Collaborate on community happenings
- Stay up to date on association interests
- Manage your account
- And more, any time on any device.

Your account is already set up and ready to use. Simply download TownSq in the app store using your mobile device or register at www.townsq.io with your Associa account number and zip code.



1.877.ASSOCIA | www.associaonline.com

CONNECT. COLLABORATE. STAY UP TO DATE.

Designed as an all-in-one solution for managing communities, TownSq delivers the most complete, mobile community experience by helping you connect, collaborate and stay informed on everything happening in your community.

CONNECT

- Easily communicate with your neighbors, community management team and board
- Access and update your account
- Pay online and review account balances anytime
- Make your voice heard with community polls

COLLABORATE

- Submit work orders, service and architecture requests with no hassle
- Reserve and manage common areas and amenities
- Manage committee special projects and assignments
- Post community updates and announcements quickly
- Save time and reduce paperwork

STAY UP TO DATE

- Get up-to-date community news and events
- Receive status updates on your requests
- Schedule push notifications for upcoming projects and completed assignments
- Upload and access association documents whenever you need

townsq
experience
community your way

844.281.1728 | www.townsq.io

ASSOCIA ONCALL provides the peace of mind that comes with knowing maintenance issues can be solved with a phone call. It's expert service from a trusted neighbor.

ASSOCIA ONLINE PAYMENTS replaces your check with a click! Associa offers homeowners the option to pay their dues and assessments online, 24/7/365, without the burden of managing paper checks.

ASSOCIA POWER offers solutions to better manage your energy costs in deregulated markets, with estimated savings between 10-25%.

ASSOCIATIONS INSURANCE AGENCY, INC. (AIAI) delivers exceptional, affordable insurance to community associations across the United States with carriers like Travelers, Farmers Insurance, Lloyd's of London and others.

BUILDING RESERVES delivers customized reserve studies that are easy to read, allowing boards to quickly understand long-term budgets and implement them in their communities.

COMMUNITY ARCHIVES helps home buyers, sellers, and other professionals involved in property transactions receive the documents they need with fast, secure trackable responses.

HOA COLLECTION SERVICES (HCS) works with boards and homeowners to recover delinquent assessments, interest, violations, and fines with the goal of creating win-win outcomes.

LHR offers a full menu of solutions for emergency response, restoration and large-scale construction projects, and works with homeowners and boards throughout the insurance claims process.

REFUSE SPECIALISTS offers a money-saving waste disposal, hauling and recycling solution by pooling the collective buying power of thousands of residential communities and auditing every line of every hauler invoice, every month with their proprietary software to ensure bills remain 100% accurate.



**CONTACT US TODAY TO LEARN MORE ABOUT
ASSOCIA INTEGRATED SERVICES!**

800.808.4882 | WWW.ASSOCIAONLINE.COM

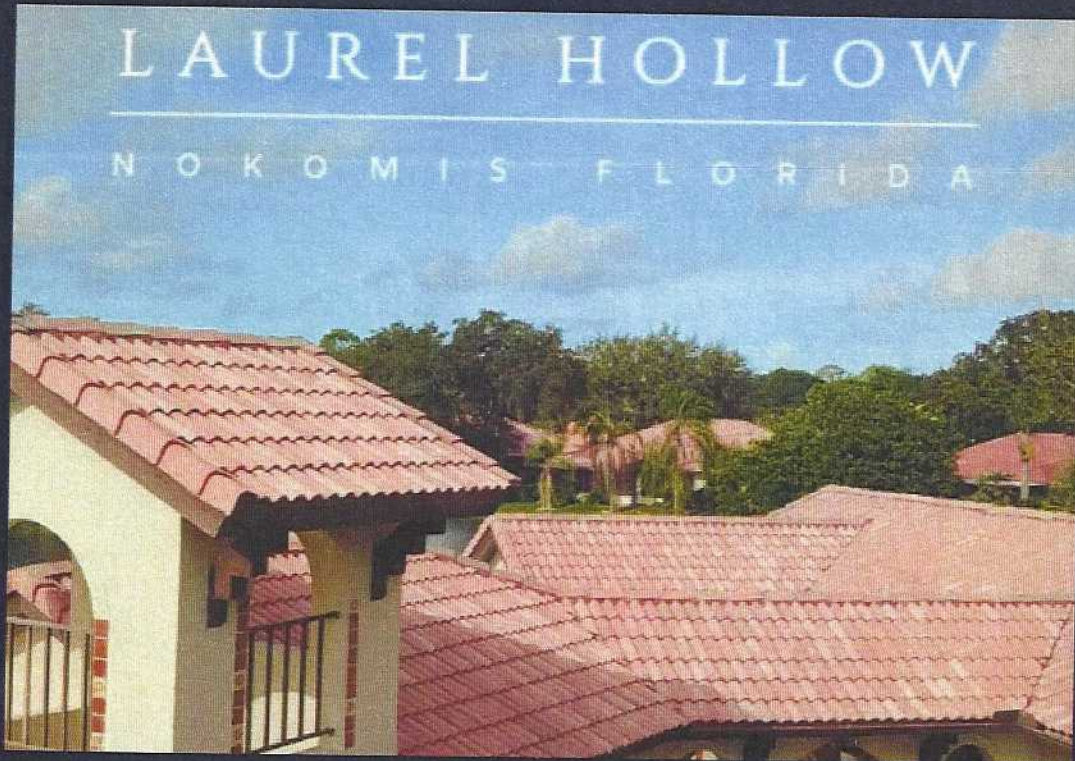


Associa[®]
Gulf Coast

COMMUNITY. PARTNERSHIP. ASSOCIA.

PROPOSAL FOR FULL SERVICE MANAGEMENT

PREPARED BY: Nicholas Pijafas, L.C.A.M., Licensed Broker



Thank you for considering Associa Gulf Coast for this partnership with your association.

Associa is the largest and most advanced property management firm in the world. Our service capacity and access to resources would be a perfect fit for your association.

With over 42 years of experience in Association Management, we have seen it all and have the solutions to mitigate nearly any issue.

The membership and her assets are safe with us. Associa's financials are sound, we carry a six-million-dollar fidelity bond, plus our local branches are each audited by the home office for compliance and service quality.

Communication, work orders and financial management, are all made simple with easy-to-use online portals.

We have a host of partner companies that provide excellent services, while offering your community owners steep discounts.

In addition, Associa is consistently voted a "Great Place to Work", which ensures the Community Manager, and their staff will be from the best in the industry.

After all options have been reviewed, you will find Associa is the ideal provider for your association's management services.

Thank you again, it is truly appreciated.

I look forward to our next conversation.

Kind Regards,

Nicholas Pilafas, LCAM, LIC Broker
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Associa Gulf Coast
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THE MOST SUCCESSFUL COMMUNITY ASSOCIATIONS ARE POWERED BY ASSOCIA.

Associa manages more than 12,000 communities that are home to over 5 million homeowners, and we've earned our leadership position. With nearly 200 of our employees holding a PCAM®, our industry's highest professional designation, Associa employs more PCAMs than any other community management company.

OUR PROVEN LEADERS

The Associa Gulf Coast leadership team has decades of broad and deep experience managing waterfront properties, luxury condominiums, golf & country clubs, and more.

OUR A+ RATING

For over ten years, Associa has maintained an A+ rating with the Better Business Bureau (BBB). The BBB has stringent requirements including a 16-category grading scale. Associa has the highest rating of A+ due mainly to our proportionally low rate of filed claims and 100% closure rate. We actively monitor BBB claims and use these findings to ensure clients always receive the service they deserve.

OUR ACCOLADES

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Last year when I purchased a new winter home in Florida, I was asked to join the HOA Board. One of the first things we had to do was hire a new management company. Shortly thereafter, I met with Associa Gulf Coast. Our board interviewed five management groups. It took a little under two years for the Board to make the right choice and award our 2017 management contract to Associa, and everyone in the community is quite happy with the selection.

– Bob M. ”

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SERVICES OVERVIEW

OUR EXPERTISE AND YOUR COMMUNITY GO HAND IN HAND

When a leading community and a leading community management company come together, you can expect success. Through our decades of experience, we've learned that the best boards focus on sustainability, security, improvement and engagement. With our expertise and your vision, we put our services to work for you.



SUSTAINABILITY + MAINTENANCE - Having fundamental programs and services in place for comprehensive management allows communities to continuously meet the needs of their residents.



SECURITY + TECHNOLOGY - The most robust technology protects communities' funds and safeguards sensitive information while enabling easy access to authorized board members and homeowners.



IMPROVEMENT + CUSTOMER CARE - Communities that are constantly becoming better places to live go beyond the basics with a customized mix of additional services that allow them to steadily work toward achieving their vision.



ENGAGEMENT + LIFESTYLE SERVICES - Successful communities understand the impact of engagement and they find ways to use their collective resources to turn residents into agents of good for their community and the communities around them.

By partnering with Associa, your board members can focus their efforts on engaging with the community while we help ensure it continues to thrive.

Read on to discover how.

OUR SERVICES



SUSTAINABILITY + MAINTENANCE

Keeping your community functioning at its best with core services and comprehensive maintenance solutions.

SUSTAINABILITY

Our core services sustain your community's daily functions while maintaining the level of success your residents deserve.

TOP-TIER MANAGEMENT SERVICES

- Professional consultation to boards
- Local management support team
- Annual meeting management
- Annual management calendar
- Contract negotiation
- Dispute resolution within governing document guidelines
- Personnel and subcontractor supervision
- Assist owners and agents with real estate transactions

BULLETPROOF FINANCIAL MANAGEMENT

- Comprehensive financial reporting
- Maintain and update all association finances in real time
- Budget analysis and preparation
- Monthly financial reports
- Monthly statements or coupon booklets mailed to homeowners
- Electronic funds management
- Investment fund monitoring
- Use of general ledger modified accrual method
- Accounts payable and accounts receivable services
- \$6 million fidelity bond, the industry's highest level of protection
- Billing and collections of dues and assessments

FAIR ELECTIONS & GOVERNANCE

- Board and committee meetings
- Preparation and attendance at board and annual meetings
- Preparation of board updates and meeting packages
- Board portals for access to financials, work orders, private messages, delinquencies and violations
- Homeowner portals for access to board meeting schedules, meeting minutes and actions taken, voting capabilities and resident surveys

PROACTIVE COLLECTIONS & ENFORCEMENT

- Governing documents enforcement
- Delinquency and violation notices
- Delinquent account management
- Courtesy reminder sent within 48 hours of community review or homeowner report
- Infraction enforcement report sent to board and included in Board Portal
- Board receives copy of correspondence and photo of infraction if homeowner called to a hearing
- Third-party collection agency
- Call center, lien recordation, personal litigation and foreclosure action

MAINTENANCE

A thriving community is also a beautiful community, and our tools and best practices help keep up your curb appeal while maintaining your peace of mind.

- Care and oversight of common areas and landscaping
- Community inspections and property condition monitoring
- Needs assessment and reserve fund analysis
- Project management and oversight
- Log, review and dispatch service requests
- Mobile technology allowing inspectors to upload violations to management software in real time

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THANKS FOR THE MEETING AND EDUCATION. I CLEARLY DID NOT HAVE ALL THE FACTS. I LOOK FORWARD TO WORKING WITH YOU IN THE COMMUNITY.

– TODD A., ESQ. ”



INHERENT INNOVATION

Our best-in-class accounting model means best-in-class fraud protection for your community. It has been proven across many industries that companies that consolidate operations, or adopt a shared services model, realize widespread benefits and the model can ultimately change the scope of an organization, as was the case for Associa.

Launched in 2014, Associa's Client Shared Service Center (CSSC) did more than just evolve the management industry, it revolutionized it.

Our CSSC in Richardson, Texas, has allowed us to reduce operating costs by creating economies of scale, support long-term growth through sustainable and scalable business practices, provide comprehensive training and information to new managers quickly and efficiently, and protect our organization and our clients from fraud.



HOW DOES OUR SHARED SERVICES TEAM WORK TO PREVENT FRAUD?

One doesn't have to look far to find instances of fraud in associations. When fraud occurs in an association, boards are often left to deal with the consequences alone. Associa created a first-of-its kind standardized accounting model that actively identifies and creates preventive protocol for common areas of fraud such as:

- Fraudulent bank statements and/or balance sheets
- Payments made to vendors that do not exist or who are not qualified for the services they provided
- High and/or multiple payments for unbudgeted purchases or unnecessary repairs for the association
- Signature forgery
- Lack of support for reimbursement requests, credit card statements or general check requests

FRAUD PREVENTION PROCESSES AND TOOLS

- Limited access to vendor master files
- Secure lockboxes for collection of accounts receivable due to the association
- Divided deposit and bank statement reconciliation procedures
- Secured check stock and printing procedures
- Appropriate departmental supervision of employees
- Regularly updated signature cards, PINs and authorization codes
- Mandatory Anti-Fraud training for all shared service center employees

By partnering with Associa, you're inheriting a shared services team that uses comprehensive, standardized practices to protect your community against an array of daily risks.

WHY IS SEGREGATION OF DUTIES IMPORTANT?

Segregation of duties is a critical consideration in achieving the objectives of internal control within Associa. It is a basic control that prevents or detects errors and irregularities by assigning responsibility for initiating transactions, recording/reporting transactions, and custody of assets to separate employees. All our offices are required to implement adequate segregation of duties in their internal control structure to prevent errors or irregularities and ensure their timely detection.

SEGREGATION OF DUTIES PROVIDES TWO BENEFITS:

1. It makes deliberate fraud more difficult to perpetrate and conceal because it requires collusion of two or more persons
2. It increases the likelihood that innocent errors will be found. At the most basic level, it means that no single individual should have unchecked control over two or more phases of a transaction or operation

As you can see, we take the financial security of our clients very seriously. With Associa, you can rest assured your association and its assets are in the safest hands in the management industry.



SECURITY + TECHNOLOGY

Balancing protection and access to your information with industry-leading technology.

SECURITY

Safeguarding your information is critical for keeping your community successful. That's why we've developed protocols to ensure that only authorized parties can access your sensitive data.

DATA STORAGE

Our physically secure data center protects your information using layers of security, constant surveillance, biometric access control, and encrypted data storage.

DATA HANDLING

To maximize security, we use industry-leading software. We also segregate duties and maintain GAAP compliance to protect your funds.

DATA ACCESS

Associa provides board members, homeowners, attorneys and vendors with tailored, secure 24/7/365 access to association information through the Associa Access portal.

TECHNOLOGY

Because we understand that accessing your data is just as important as protecting it, we've employed specialized technology that allows different parties to only see the data they need.

C3

Complete Enterprise Management

C3 is our proprietary enterprise management software that tracks the full spectrum of key community operations in real-time.

- Financial management (A/R, A/P, Budgeting, Delinquency processing)
- Association management (Work Orders, Maintenance, Architectural/Covenant Tracking)
- User defined custom downloadable reporting for Microsoft Word, Excel and PDF
- Mobile platform allowing community managers to work anywhere

STRONGROOM

Secure Invoice and Payment Processing

Thanks to Strongroom, a best-in-class product that provides both unparalleled safety and convenient, secure access to your information, you can rest assured that enterprise-level verification measures have been taken before money ever leaves your accounts.

- Consolidated invoice and payment processing system
- Data and financial protection against fraud
- Invoice storage and management
- Board member access to review and approve invoices
- Accounting system integration
- Multiple payment solutions for quicker vendor payments

TOWNSQ

Experience community your way

Meet your neighbors, manage your account, and access the resources you need for better community living, all through one user-friendly mobile app. TownSq combines the social and administrative aspects of community living and helps you connect with your neighbors, collaborate with your management team and stay up-to-date on community happenings - any time on any device.

BOARDS CAN:

- Post polls and announcements
- Access governing documents and financials
- View open violations
- Manage common areas and amenities
- Create committees to manage special projects and assignments
- Save time and reduce paperwork
- View and receive updates on community projects
- Upload and access association documents whenever you need
- And more

OUR SERVICES



RESIDENTS CAN:

- Easily communicate with neighbors, community managers, and board members
- Manage their account and pay online
- Get up-to-date community news and events
- Request and review status of service inquiries
- Participate in community polls
- Reserve common areas and amenities
- And more

CREATE YOUR COMMUNITY WEBSITE IN TOWNSQ

Our new community website solution is integrated with TownSq for a convenient, all-in-one community living experience. Promote your community with a completely custom, mobile-friendly website while providing seamless access to TownSq for board members and residents.

- Fast and easy to set up and update
- Multiple themes, fonts and colors to choose from
- Seven page templates to choose from
- Preview content for approvals before publishing
- Responsive web design for easy-to-read mobile and tablet view
- Unique subdomains available with support for custom domain masking

VENDOR ACCESS

Get the Job Done Safely, Securely and Easily

- Search Associa's network of approved vendors
- Negotiated contracts and pricing save your community money
- Insurance compliance provide a layer of safety and security
- All vendors are licensed, insured and bonded
- Third-party compliance company (ERC) provides fraud prevention
- Vendors can upload and track invoices online
- ePay allows vendors to receive payments quickly

COMMUNITY ARCHIVES

Key Documents. On Demand.

- Resale transaction processing platform
- Critical property information delivered securely to:
 - Realtors®
 - Title companies
 - Attorneys
 - Mortgage lenders
 - Homeowners
- Completion of lender and mortgage questionnaires
- Realtor® fact sheets
- Appraiser information
- Documents delivered quickly and completely

SMART WEBS

Architectural Software
Built for Efficient Review

- Empowers members with an easy way to review and collaborate on projects
- Drives stronger consistency between current and prior committees
- Improves approval accuracy with guideline compliance tools
- Proactively manages submittal turnaround times
- Improves communication with management, eliminating dropped projects
- Allows instant access to completed project information

“

**THEIR SYSTEMS ARE
VERY HELPFUL AND
THEY ARE UP TO DATE
WITH PROCESSING
STRATA INFORMATION
IN A TIMELY MANNER.**

– CHRIS C.

”



IMPROVEMENT + CUSTOMER CARE

The most successful communities are always looking for ways to become even better places to live. That's why we offer a variety of integrated services for continuous improvement and dedicated customer care solutions to keep every community operating at its best.

IMPROVEMENT

A full suite of optional add-ons allows your community to build a custom package of services designed to fit your homeowners' unique needs.

ASSOCIA ADVANTAGE extends exceptional discounts and savings to your community from trusted vendors.

ASSOCIA ONCALL responds to maintenance issues with a simple phone call.

ASSOCIATIONS INSURANCE

AGENCY, INC. keeps your community covered with appropriate insurance.

LHR rebuilds your community in the event of disaster and partners with you to complete construction and capital improvement projects.

ASSOCIA POWER can deliver electricity savings between 10 and 25 percent.

REFUSE SPECIALISTS creates customized waste management solutions and saves money for your community.

COMMUNITY WEBSITES connects your homeowners with their board and community.

COMMUNITY NEWSLETTERS deliver your community's news to the doorsteps of your homeowners.

COMMUNITY MESSAGING

BY VOLO VILLAGE provides easy-to-use community notifications to keep your community informed and connected

CUSTOMER CARE

Serving our customers is a team effort. Your community manager isn't the only person available to assist your residents; our administrative assistants, financial managers and executives can also address resident issues. Committee members and homeowners primarily interact with the community manager; however, homeowners may also communicate with emergency duty managers, escrow, collections and accounts receivable personnel, depending on the issue at hand. That's why we emphasize the importance of professional service at all levels of our organization.

We've implemented the following tools and best practices to ensure consistent communications and quality customer service.

- Our managers are equipped with smart phones for email, web and phone communication.
- Our company intranet allows your manager to collaborate with other managers across the globe to solve common problems found in other communities.
- We offer annual trainings on best practices and industry standards to our boards and community managers.
- Our live emergency answering service can assist you 24/7.
- We return all emails and calls within one business day.
- We conduct regular corporate communications and site visits from the executive team.

OUR SERVICES



ENGAGEMENT + LIFESTYLE SERVICES

Community engagement is important because at Associa, we believe that the best part of having success is sharing it with neighbors nearby and communities everywhere. That's why we've created programs that allow us to help communities thrive no matter what obstacles they face as well as comprehensive lifestyles services to enrich the lives of your homeowners.

ENGAGEMENT

Part of having success is sharing it, and our corporate initiatives help your community do just that.

ASSOCIA CARES

Associa Cares is a nonprofit that supports families and communities in crisis because of natural or manmade disasters.

ASSOCIA GREEN

Associa Green helps families live healthy and sustainable lives by promoting products, services and programs that support green living.

ASSOCIA SUPPORTS KIDS

Associa Supports Kids educates families about safety and sponsors youth sports. Associa also supports National Night Out to foster cooperation between neighborhoods and law enforcement.

LIFESTYLE SERVICES

To keep your homeowners active in your community, our lifestyle services build a sense of belonging, give them a chance to meet their neighbors, and of course, have fun.

We offer:

- Dedicated lifestyle directors experienced in designing programs for every type of community
- Customized calendar of events coordinated with other local events to build a relationship with your city or municipality
- Expanded amenities through partnerships with local businesses, parks and hospitals
- Enjoyable, effective ongoing and one-time activities designed to boost revenue and involvement
- Community-building events through Associa Cares, Associa Supports Kids (ASK), Associa Green and National Night Out

“

ASSOCIA PROVIDES PROPERTY MANAGEMENT TO OUR COMMUNITY, AND I AM THE HOA PRESIDENT. I WANTED TO SAY HELLO. OUR MANAGER AND ADMINISTRATOR ARE BOTH PROVIDING OUTSTANDING SERVICE. CONGRATULATIONS AND WELCOME ABOARD. I LOOK FORWARD TO WORKING WITH YOU IN THE FUTURE.

– BILL B.

”

TRANSITION PROCESS

The transition from your current management company to Associa requires great attention to detail. And you'll have Associa's support every step of the way. We have a dedicated transition team that works with your manager, your current company and your association to ensure a professional, seamless transition. This process involves reviewing financials, governing documents and CC&Rs, past minutes, vendor contracts and scopes of service while collecting all homeowners' fees and balances, holding vendor walks and a meet-and-greet. No additional costs are associated with the transition. Please ask if you'd like to see a sample of completed transition documents.

PHASE 1: DAY 1-15

FINANCE & ACCOUNTING

- Obtain tax ID, assessment rates, unit details, annual payment plan, current financial statements, budget, vendor listings, banking signature cards, contractor information, payroll information
- Present collection policy to the board for approval
- Set up resale/transfer and refinance process
- Review delinquent assessments
- Review all collection letters
- Meet with board to review the budget

OPERATIONS

- Review community layout
- Review transition and internal audit of documents
- Review articles of incorporation, bylaws, amended and restarted CC&Rs
- Document residential guidelines
- Gather resolutions, meeting minutes, pertinent reports
- Determine attorney status
- Identify most recent tax return and franchise return
- Obtain insurance certificates from insurance agents

- Establish new SOPs
- Review reserve study
- Meet vendors
- Design welcome package

COMPLIANCE

- Review deed restrictions and enforcement
- Review covenant violation letters
- Load architectural modifications into C3
- Drive property with inspectors

COMMUNICATION

- Meet with board for a planning session
- Review website or create new site
- Contact all association members
- Notify contractors, insurance, city/county

TRAINING

- Onboard executive staff
- Develop training calendar (if necessary)
- Train community manager
- Review and train association policies
- Board orientation and training

PHASE 2: DAYS 15-30

FINANCE & ACCOUNTING

- Discuss financials and inform board of any discrepancies
- Make recommendations on current financial state
- Determine annual and long-range goals
- Implement collections process approved by board

OPERATIONS

- Inventory all facilities and assets
- Establish annual calendars for management, vendors, and the association membership
- Instruct community manager to evaluate all processes

COMPLIANCE

- Drive property again and give inspectors direction on all established and new enforcement procedures

- Instruct community manager to perform the initial two inspections with the inspectors
- Review all pending covenant violations

COMMUNICATION

- Schedule initial meet and greet between board & the management team
- Schedule initial meet and greet between the association and the management team

TRAINING

- Continue training procedures for community manager
- Ensure board training on software programs is understood by all members
- Adjust processes and procedures as needed

PHASE 3: DAYS 30-45

BOARD EVALUATION

- Executive staff **and** board to evaluate community manager



LAUREL HOLLOW CONDOMINIUM ASSOCIATION

Management Fee

93 Units

\$1,000.00 Per Month

Full Association Management Services including:

Organization and attendance at the Annual Membership/Budget Meeting

Attendance at quarterly (4) Association Board Meetings

**(for 9 meetings add \$150 per month)*

Recording of the Official Minutes

Supervise staff and resident services

Community inspections for aesthetics and compliance

Train Board members, and residents how to utilize TownSq

Live Overflow Customer Service

After-hours Emergency Line

Easy email requests info@associagulfcoast.com

Accounts Payable

Accounts Receivable

Reporting

Financial Report due to Board of Directors by the 20th of each month Including but not limited to:

•Variance Report •Balance Sheet •Income Statement

•Monthly General Ledger

•Bank Statements •Check register

•Bank Reconciliation

•Delinquency/Prepaid Report

•YTD budget trend report Maintenance

Access to Associa OnCall Handymen & Technicians Dedicated Maintenance Manager

Develop and implement Maintenance Schedules Track structural life and compare to reserve amounts

Membership in Associa Advantage

<https://associaadvantage.com/>

Technology

Approval and Reporting through AvidExchange StrongRoom (online A/P services)

<https://www.avidexchange.com/products/avidstrongroom/>

Resident access to TownSq! (online Board and Homeowner forum)

<https://www.townsq.io/>

2023 Standard Exhibit A
Itemized Charges for Periodic Routine Services

Item	Charge
Records Storage / Transport / Intake / Destruction	\$6.00 per box per month / \$7.00 per box / \$10.00 per box
Electronic Data Storage	\$16.99 per month
Physical Records Digital Conversion	\$300.00 per box
Account Maintenance Fee	\$1.20 per unit per month
Replacement Coupon Booklets	\$10.99 per booklet with (12) envelopes included
Project Administration Fee	1% charge on all capital projects that exceed \$10,000
Year End Financial Postcard	\$1.50 each
Envelope (various sizes and types)	\$0.30 each - \$0.99 each
Postage	Direct cost
Manual Check Application/Deposit	\$3.00 each
Billing Statement	\$2.25
E-Statement	\$1.15
Friendly Reminder Notice	\$10.00 per notice (owner charge)
Notice of Late Assessment (NOLA)	\$15.00 per notice (owner charge)
Affidavit Package	\$25.00 (owner charge)
Notice of Intent to Lien	\$50.00 per notice (owner charge)
Attorney Package Preparation / Fees for Legal Services	\$75.00 per notice (owner charge)
NSF Fee	\$30.00 per check (owner charge)
Community Mailings (folding and stuffing, etc.)	\$.25 per piece & supplies reimbursement
Label (various sizes and types)	\$0.15 - \$0.30 each
AP Check Stock / Extra Check Run	\$1.00 each / \$30.00 per check
Black & White Copy / Color Copy / Scanned Document	\$0.25 per page B&W / \$1.00 per page color / \$0.25 per scan
1099/1096 Forms	\$35.00 set up each association + \$15.00 per form
Tax Preparation Administrative Fee	\$50.00 annually
Auditor Assistance	\$125.00
Acting as Agent of Record for Association	\$50.00 annually
Certified Mail	\$2.00 per piece plus direct postage costs
Courier/ FedEx/UPS Overnight	Direct Cost plus \$5.00
Gate Card/Key Processing	\$10.00 per request if utilized
Lease/Rental Tracking (non-application/approval process)	\$100.00 per month
TownSq ARC	\$30.00 recurring monthly charge. \$10.00 per architectural application through TownSq \$25.00 per architectural application for custom / non TownSq
TownSq Digital Voting	\$250.00 per voting ballot occurrence / event
Annual Business Resources & Supply Fee	\$2.50 per unit annually
New Client Set Up Fee	\$15.00 per unit / \$300 minimum \$300.00 (Financial Only) \$500.00 (Associations with less than 100 units) \$5.00 per unit not to exceed one Month's Management Fee (Associations with more than 100 units)

WAIVED

Alternative Services

Loan Placement Fee (negotiation/securing loan for client)	1% of loan if utilized
Special Assessment Processing Fee	\$10.00 per unit if utilized
Project Oversight	Percentage of additional contract project oversight in excess of \$10,000 if utilized, will apply if Agent and Association enter into an additional written agreement with clear specifications and agreed upon by both parties.
Insurance Loss Management	20% of total loss over \$25,000. In the event of an insurance loss, this fee only applies if Agent serves in any capacity as coordinator of the insurance claim. If Agent does coordinate the insurance claim, the fee will be added to the insurance claim resulting in zero dollars out-of-pocket to the Association. If the Association chooses to manage the insurance claim, then Agent is not entitled to this fee.
Foreclosure Tracking Service	\$20.00 per summons
Resale Leasing Rental Application	\$100.00 per application if utilized
Owner Refund Services	\$5.00 per refund
Meeting Attendance	\$100.00 per hour per person if exceeds contract obligations
CAM Hourly Rate	\$100.00 per hour if exceeds contract obligations
Meeting Minutes	\$75.00 if exceeds contract obligations

Payroll Processing & Benefits Administration & Employee Screening

<u>Payroll Processing—Onsite Personnel</u> Includes 941 tax filings, regulatory filings & W-2's, federal and state taxes, workers' compensation insurance, payroll processing expense, Cobra administration and other governmental reporting requirements and AGC's overhead costs and liability insurance.	Onsite CAM / Administrative - Total Cost Plus 10% Onsite Maintenance / Janitorial – Total Cost Plus 12%
<u>Benefits Administration— Onsite Personnel</u> All full-time employees (40 hours/week) are entitled to a group medical and life insurance program which goes into effect on the first day of the month following 30 days of employment.	\$570.00 per month for all full-time billable onsite Personnel *Estimated 2023 rate. Actual rate may vary based on cost.
<u>Health Savings Account Contribution</u> Certain medical plans offered by Associa come with a Health Savings Account. Contributions are made Semi-annually in January and July of each year.	\$250.00 per contribution per employee *Estimated 2023 contribution rate. Actual cost may vary and will be adjusted annually.
<u>Employee Screening Costs— Onsite Personnel</u> (County and state criminal background, drug screen, motor vehicle report, social security report, etc.)	Direct cost

Special Services

VOLO Village™	\$2.50 per unit per month
Associa Community Newsletter	\$35.00 newsletter production plus mailing costs
Violation Letter	\$3.00 per violation letter plus mailing costs
Direct Pass Through	Direct cost + 10% (excludes mileage)

Transfer, Resale and Disclosure Certificates

Estoppel and Transfer Fee(s)	Market Rate
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Additional services are provided as may become available at the prevailing rate or as mandated by law. All fees listed on this document are subject to reasonable change, from time to time, without prior notice. However, Agent may provide a courtesy notification via regular mail, facsimile or e-mail to the Board President or the Liaison.



DISCOVER VALUE BEYOND MANAGEMENT WITH INTEGRATED SERVICES

Fulfill the needs of your community beyond everyday management with integrated services – a variety of customizable services you can choose from to meet your community’s specific needs. By offering more, we know you can achieve more, which is why the right blend of integrated services is critically important to achieving your community’s vision. Get started by learning about how each one can help.

THE ARC COMMITTEE MANAGER from SmartWebs is an online solution for architectural review committees, community managers and boards to tracking the architectural review process.

ASSOCIA ACCESS provides 24/7 online access to board members, homeowners, attorneys and vendors for essential account and association information.

ASSOCIA ADVANTAGE uses the purchasing power of Associa’s more than 5 million homeowners to offer exceptional savings from trusted vendor partners such as Home Depot, Owens Corning, BrightView and others.

ASSOCIA COMMUNITY NEWSLETTERS provides a dedicated team to design professional, informative newsletters, with the option to print and ensure distribution to homeowners in a timely manner.

ASSOCIA COMMUNITY WEBSITES is our turnkey website solution to connect your homeowners and equip your board with powerful, interactive tools for compliance and communication.

ASSOCIA DIRECT CONNECT provides cutting-edge entertainment options like broadband, phone, internet and more for Associa-managed communities.

ASSOCIA FHA ASSIST provides condominium associations with start-to-finish support for FHA certification to help prevent the loss of unit sales and to ensure that FHA financing is available.

| ASSOCIA GULF COAST

A. MANAGEMENT SOFTWARE - ACCOUNTING PLATFORM

Only Associa can share with you the most sophisticated and effective financial and accounting software functionality that has been developed within the community management industry.

COMPLETE CONTROL FOR COMMUNITIES (C3)

C3 is our proprietary enterprise management software that tracks the full spectrum of key community operations in real-time including:

- Financial and accounting management (Accounts Receivable, Accounts Payable, Budgeting, Delinquency Processing and General Ledger posting).
- Association management (work orders, maintenance, architectural and covenant tracking).
- User defined custom downloadable reporting for Microsoft Word, Excel and PDF. C3 offers more than 250 reports that can be customized for your community.
- Mobile platform that allows community managers to work anywhere.
- Monthly financial reports with Income Statement, Balance Sheet, General Ledger detail, A/R Aging Analysis and A/P Aging Analysis.
- Billing and collections of dues and assessments.
- Investment funds monitoring and electronic funds management.

STRONGROOM | ACCOUNTS PAYABLE SYSTEM

This secure invoice and payment processing software is best in class that provides both unparalleled safety and convenience. With secure access to your information you can rest assured that enterprise-level verification measures have been taken before money ever leaves your account.

- Consolidated invoice and payment processing system.
- Data and financial protection against fraud.
- Invoice storage and management.
- Board member access to review and approve invoices.
- Accounting system integration.
- Multiple payment solutions for quicker vendor payments.

DATA HANDLING

To maximize security, we utilize our industry leading software and also segregate duties, while maintaining GAAP compliance to protect your funds. We have developed protocols for ensuring that only authorized parties can access your sensitive data.

MANAGEMENT/COMMUNITY SOFTWARE

INTRODUCING TOWNSQ – Video introduction available at <https://youtu.be/loImyqmad-k>

TownSq meets the three most important needs for your building's residents: the need to easily connect with neighbors, securely collaborate with the community's management team and stay up to date on the latest community happenings.

CONNECT

TownSq is a dedicated channel for communicating with everyone in your community and allows you to designate access to sensitive information by role.

- Pay online and review account balances
- Make your voice heard in community polls
- Authorize guests

COLLABORATE

With maintenance upgrades, capital improvements, and countless community events and programs happening throughout the community, collaboration with key stakeholders is crucial. TownSq's collaborative tools lets you seamlessly and securely work with everyone involved in maintaining your community.

- Submit work orders, service and architecture requests with no hassle
- Create committees to manage special projects and assignments
- View open violations

STAY UP-TO-DATE

When you know what's happening in your community, you can make more informed decisions. With TownSq, everyone in your community can stay up to date in real time, allowing you to get involved and stay engaged in the community.

- Get up-to-date community news and events
- Receive status updates on requests
- Upload and access association documents

PUBLIC-FACING COMMUNITY WEBSITE

Promote your community through an attractive, easy-to-manage website available for public viewing. By transferring your current domain, we can instantly update your site. TownSq seamlessly integrates with your community website and serves as your website management system.

BOARDS CAN:

- Post polls and announcements
- Access governing documents and financials
- View open violations
- Manage common areas and amenities
- Create committees to manage special projects and assignments
- Save time and reduce paperwork
- View and receive updates on community projects
- Upload and access association documents whenever you need
- And more

RESIDENTS CAN:

- Easily communicate with neighbors, community managers, and board members
- Manage their account and pay online
- Track delivery of packages
- Get up-to-date community news and events
- Request and review status of service inquiries
- Participate in community polls
- Reserve common areas and amenities

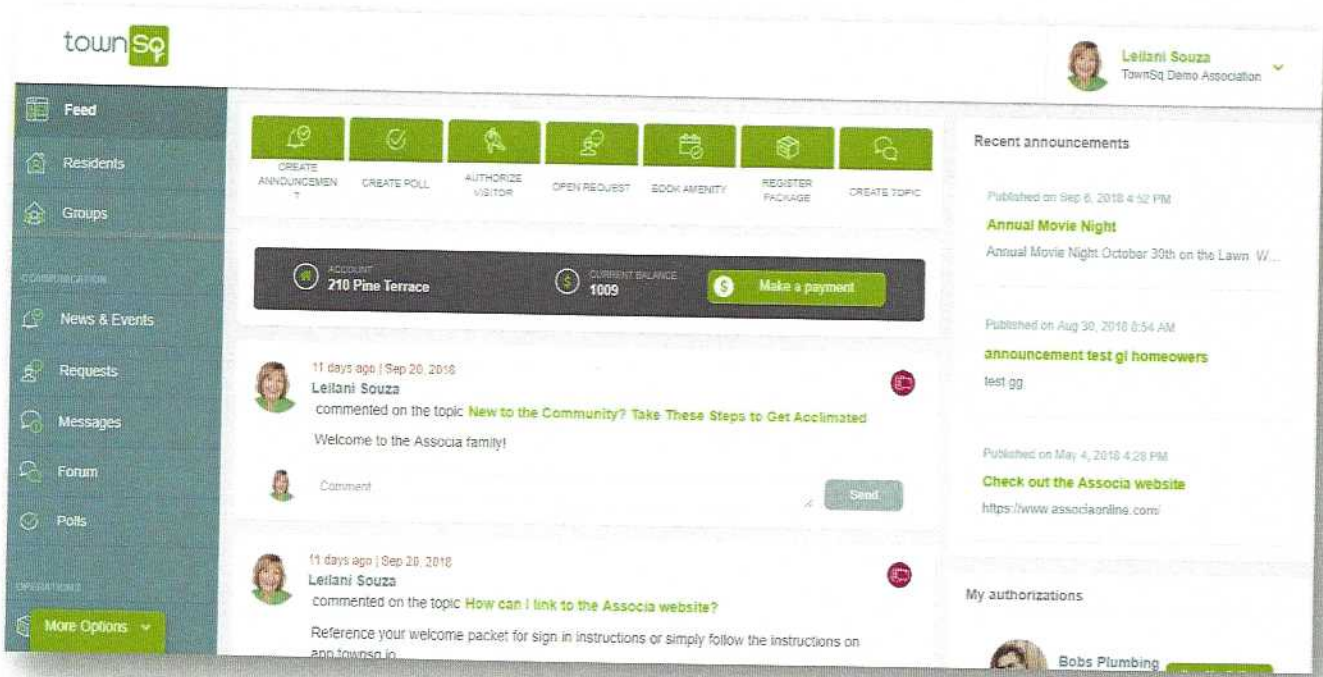


Figure 1 - Owner Feed

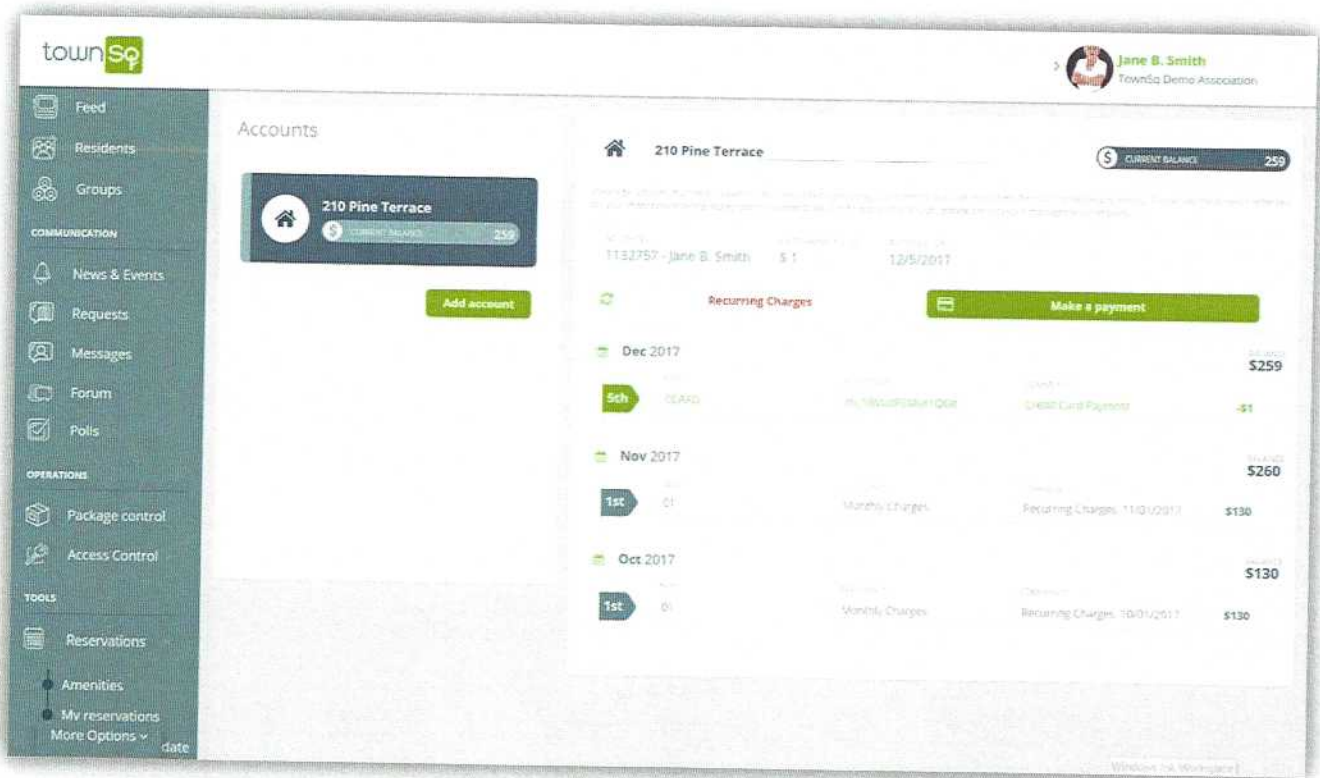


Figure 2 - Account/Payment Management

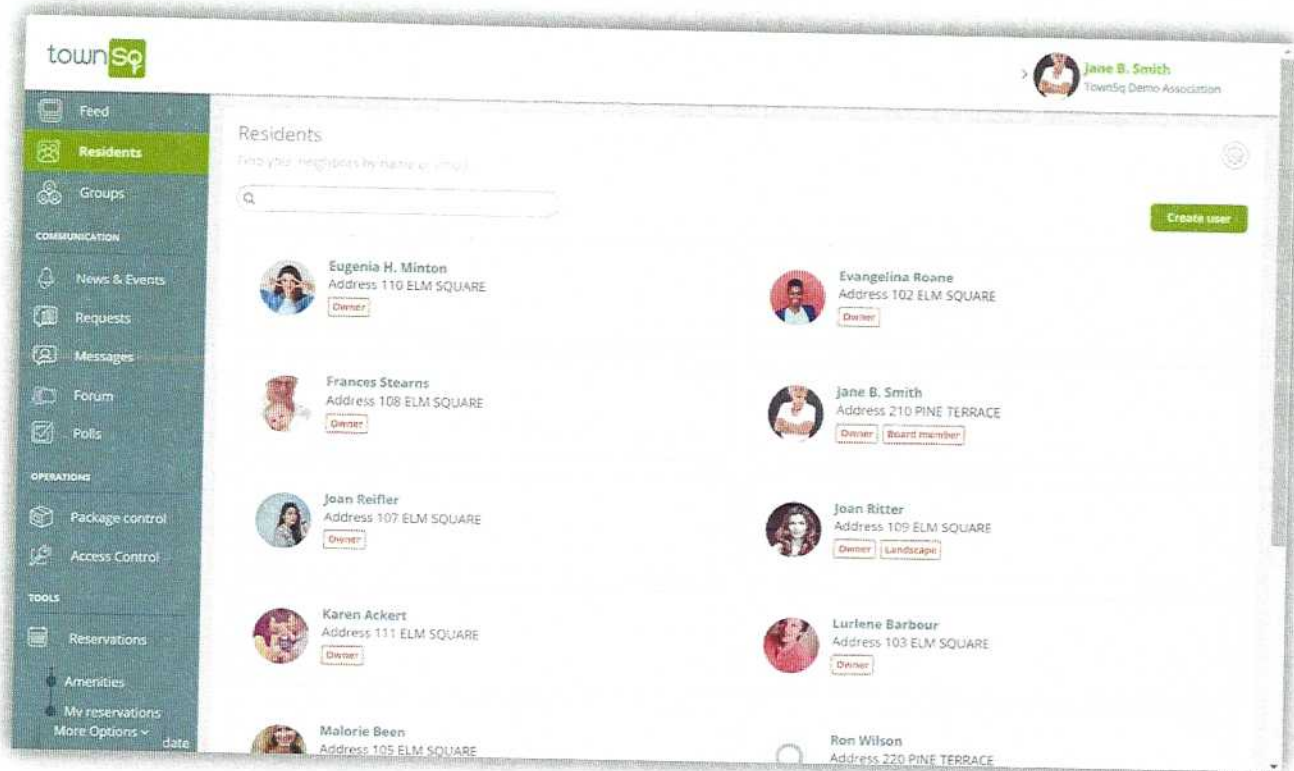


Figure 3 - Resident Directory for Easy Communication

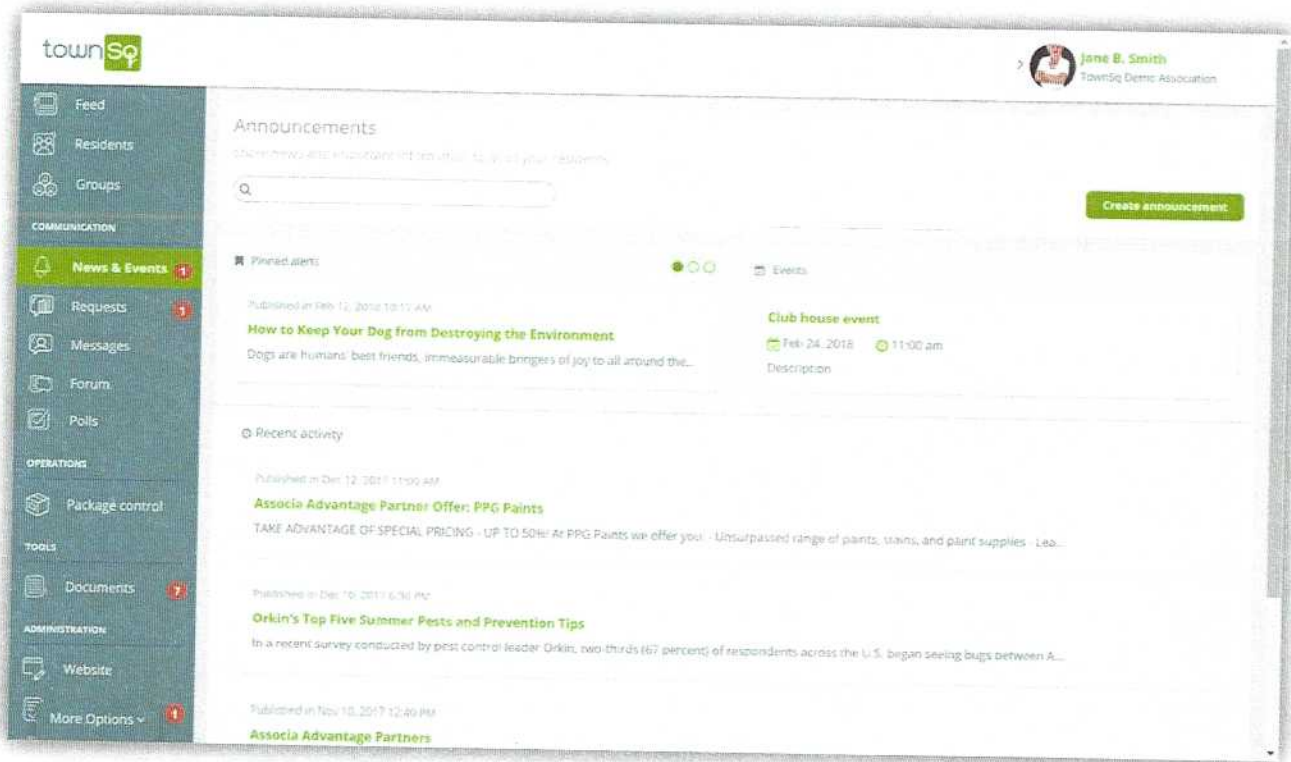


Figure 4 - News & Events

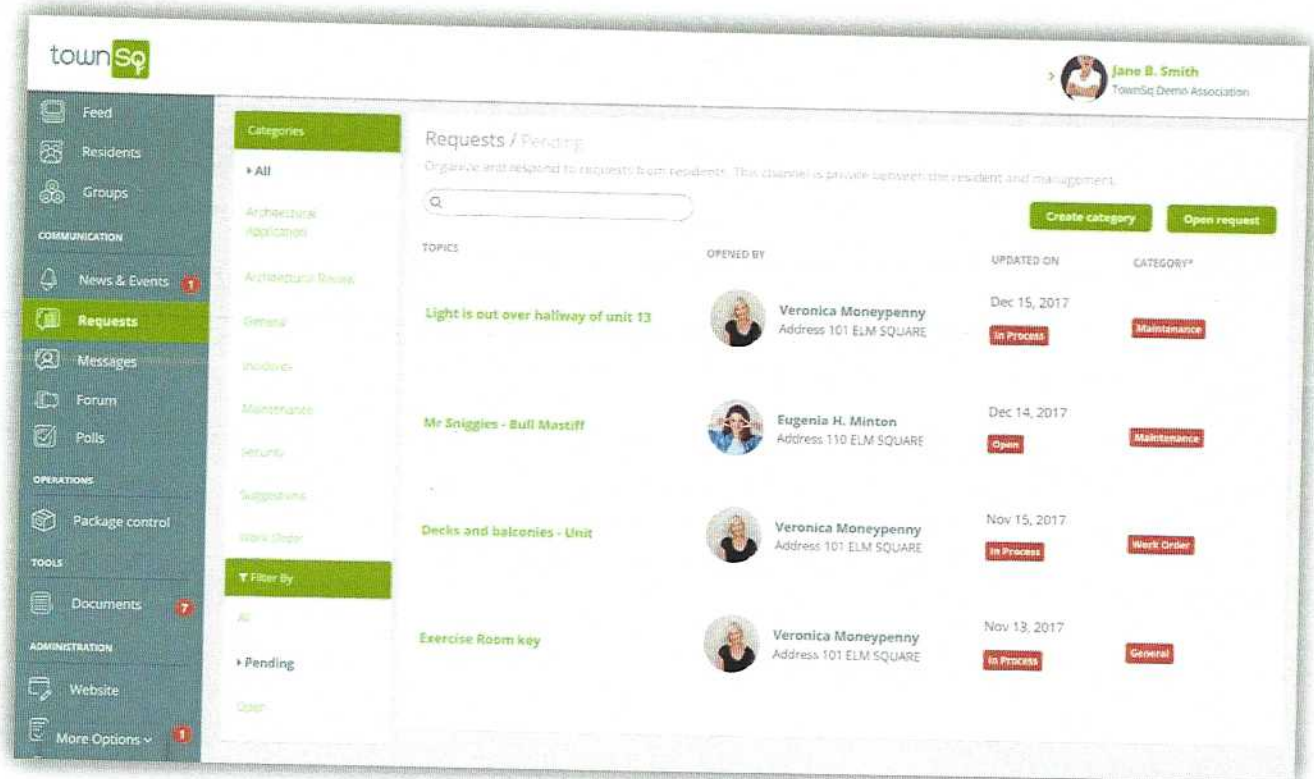


Figure 5 - Requests & Work Orders

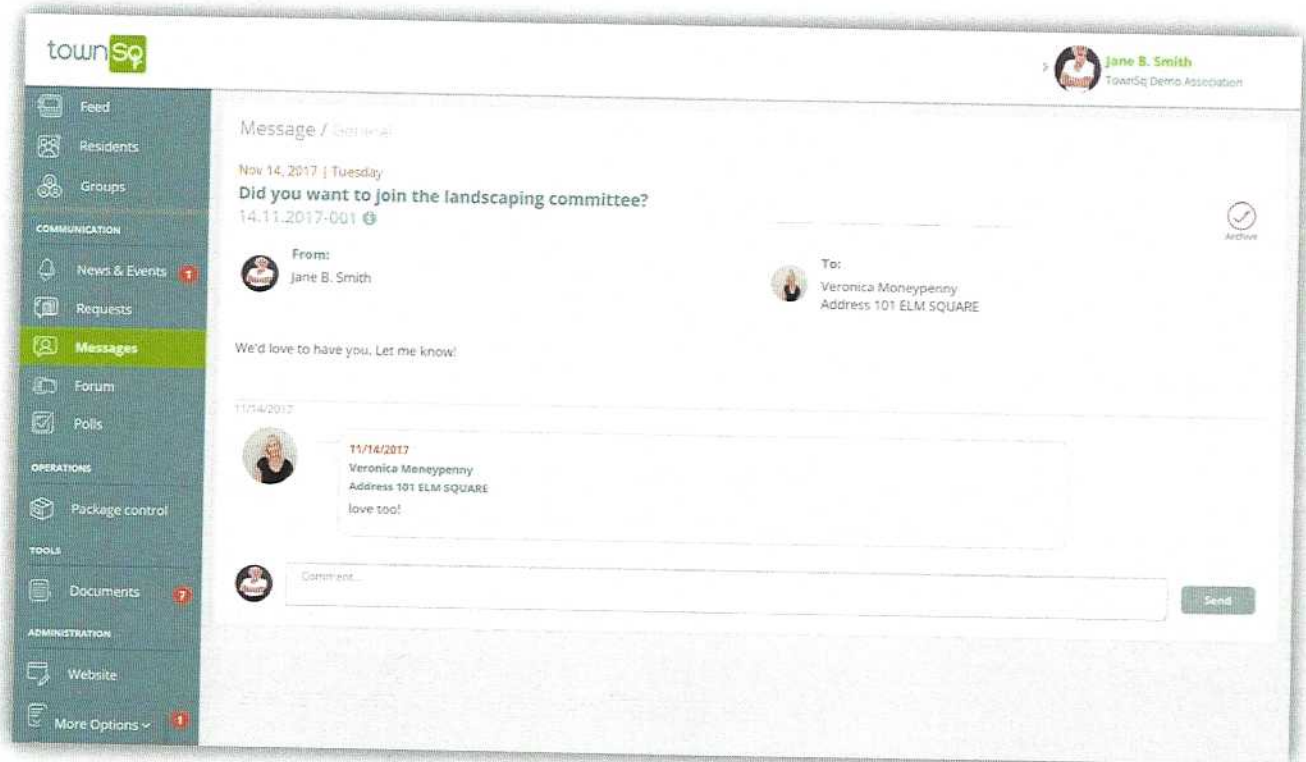


Figure 6 - Messages

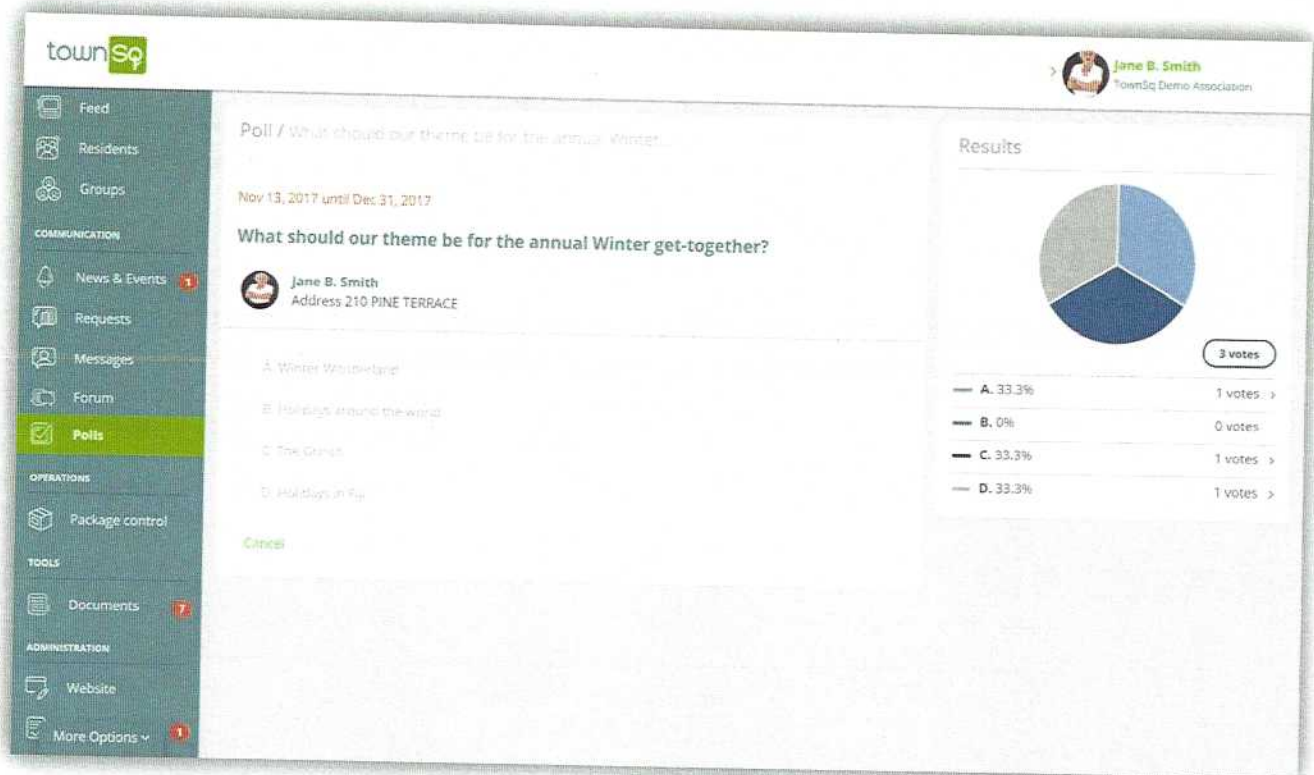


Figure 7 – Polls

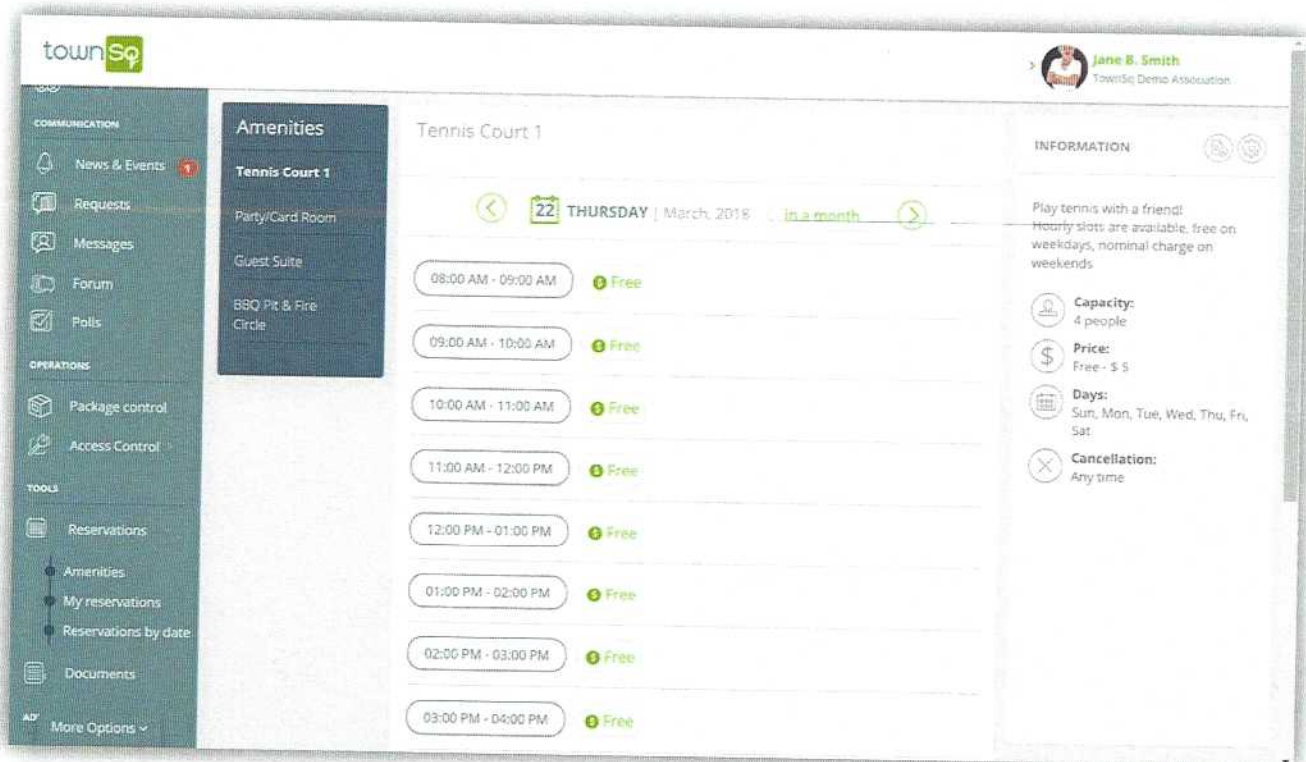


Figure 8 – Amenity Reservations

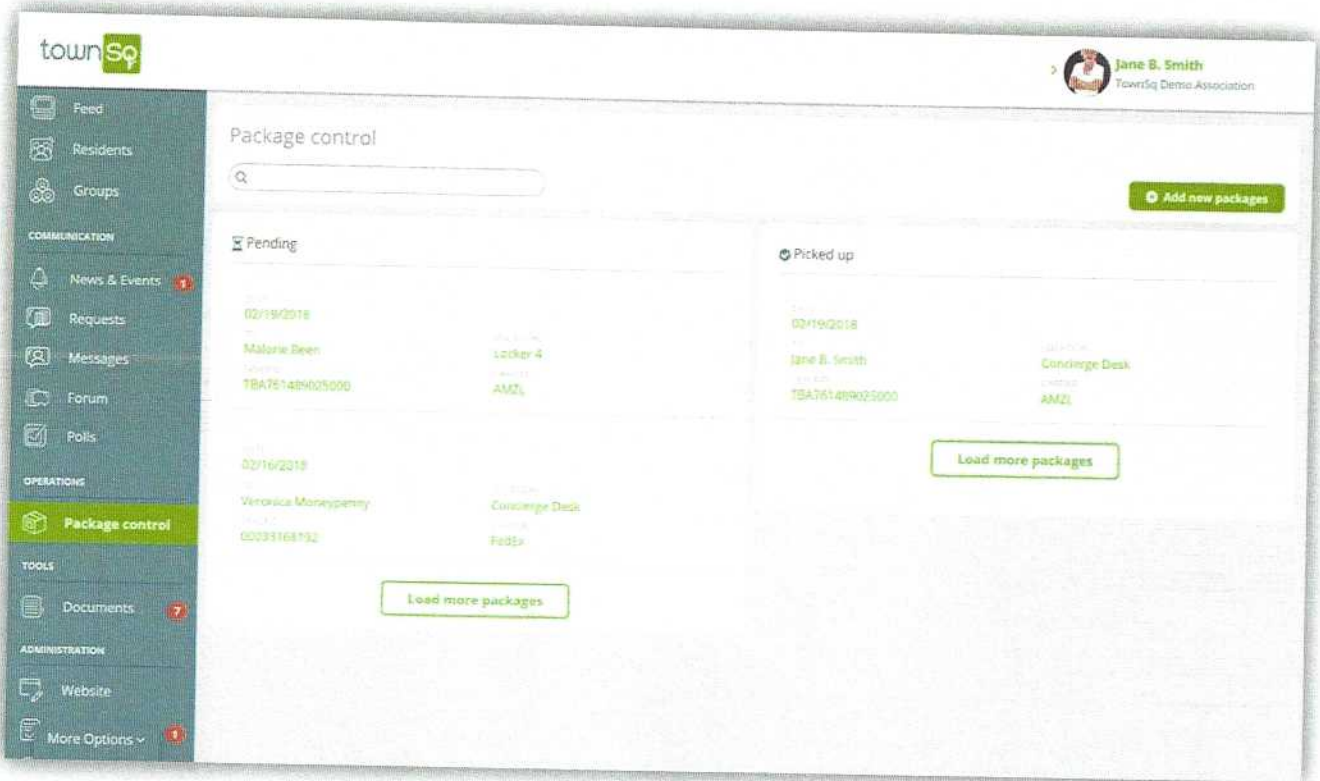


Figure 9 - Package Control

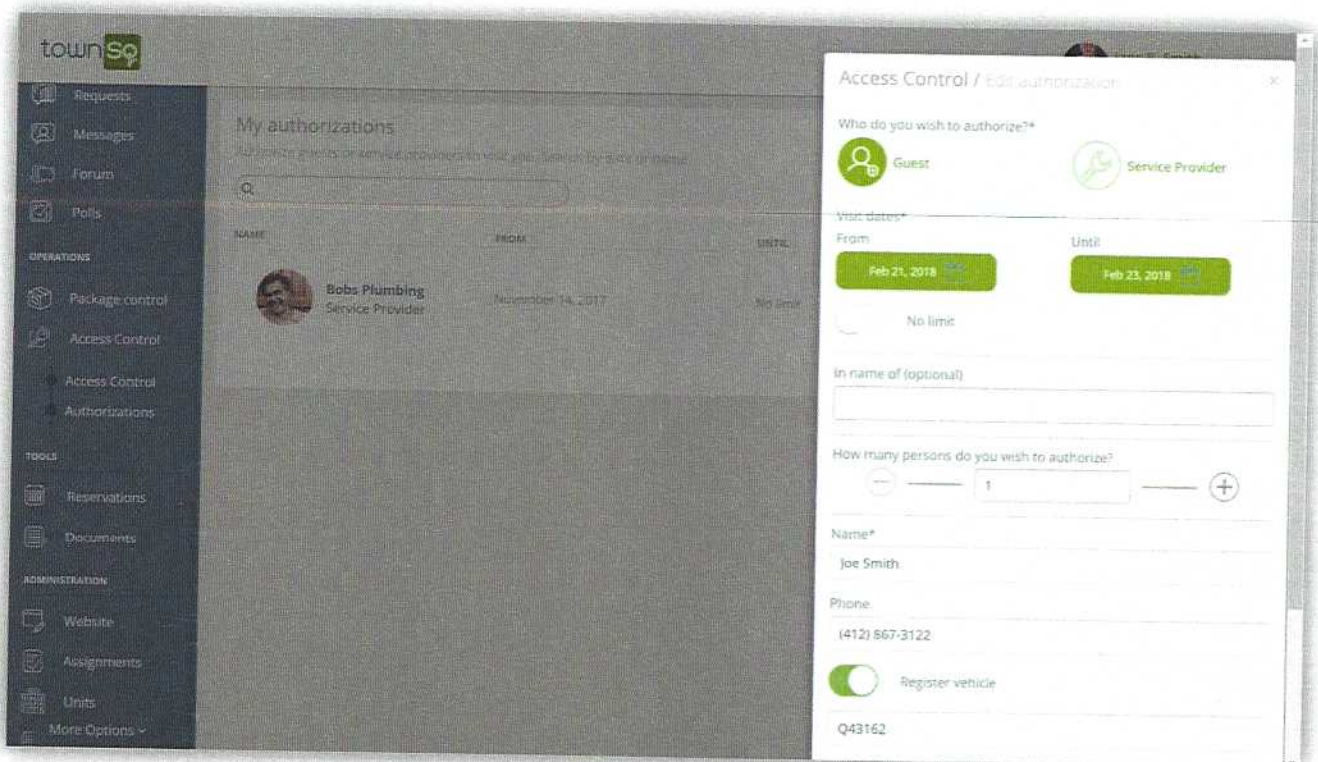


Figure 10 - Visitor Management

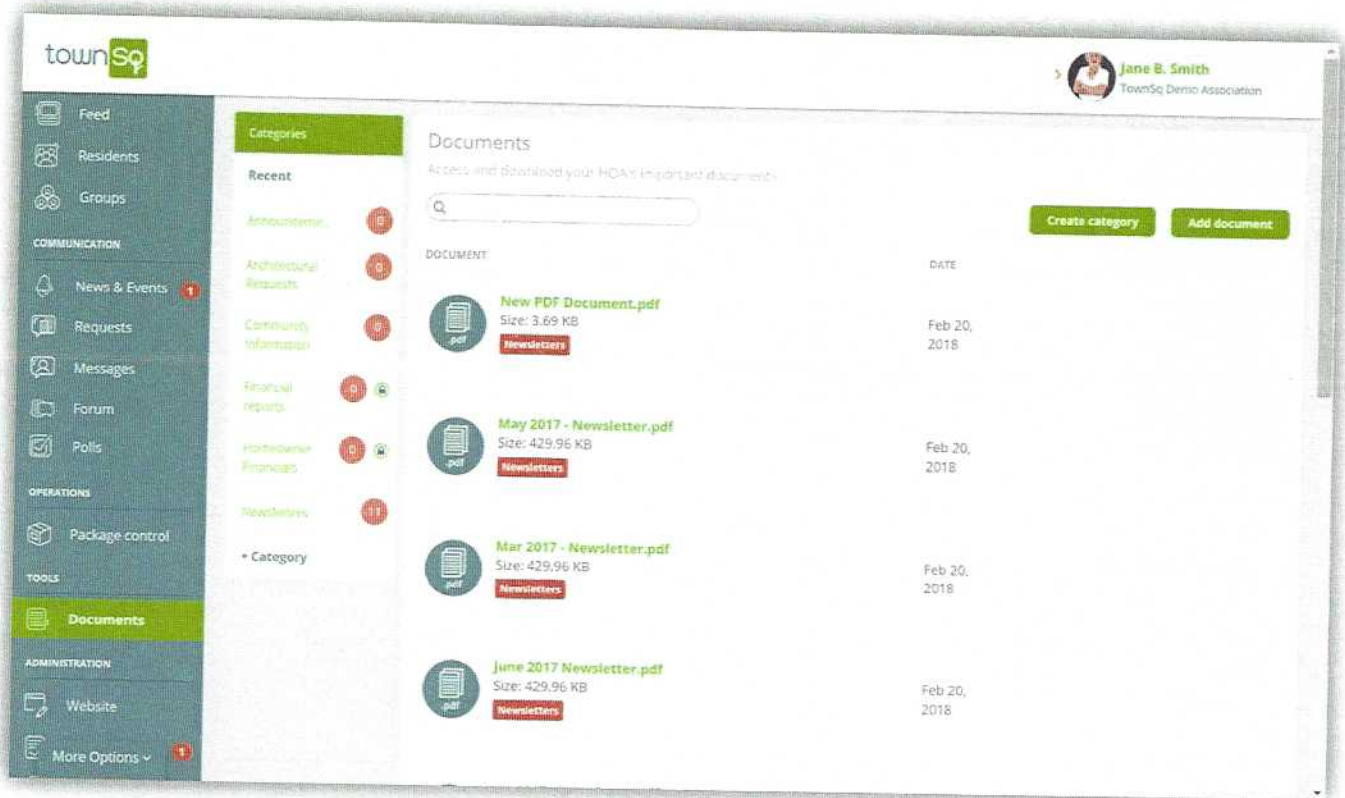


Figure 11 - View Community Documents

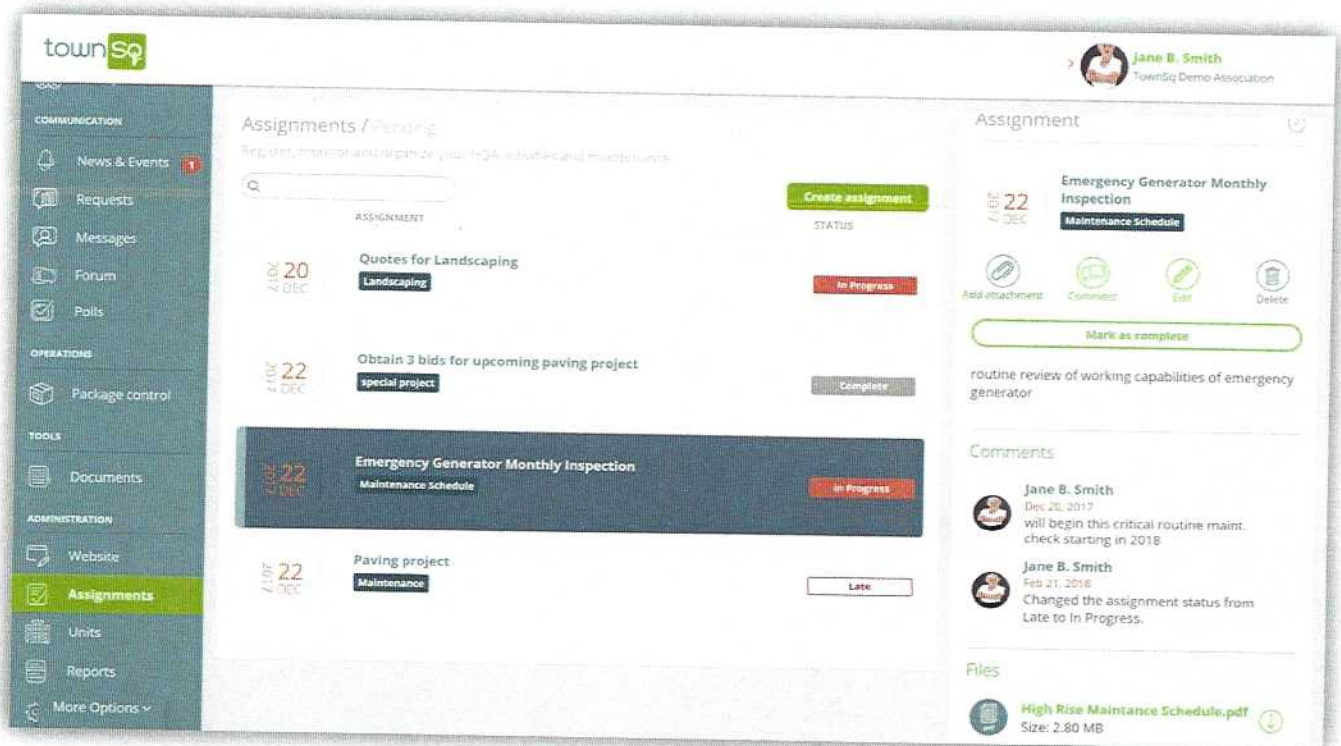


Figure 12 - Assignments/Task Management

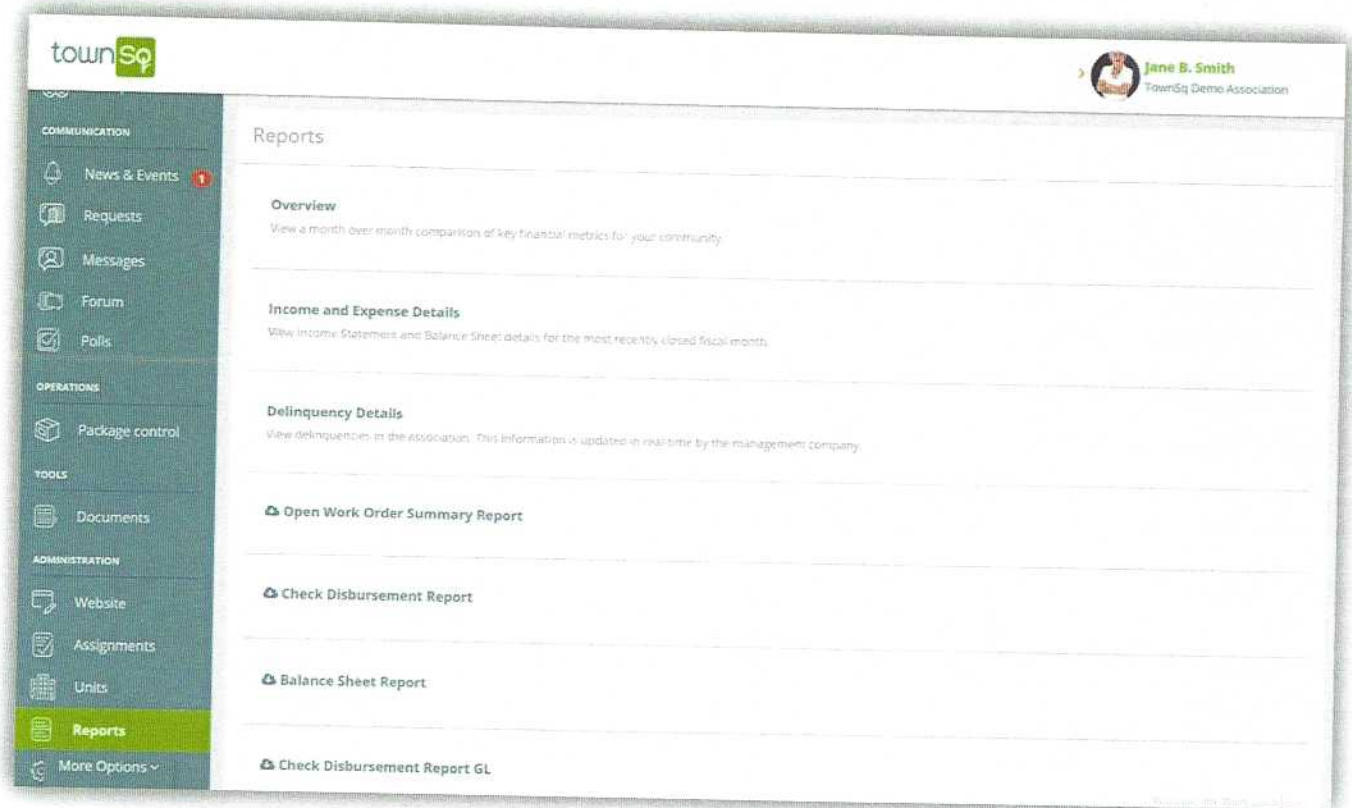


Figure 13 - Board Reports

COMMUNITY MESSAGING TOOL – VOLO VILLAGE

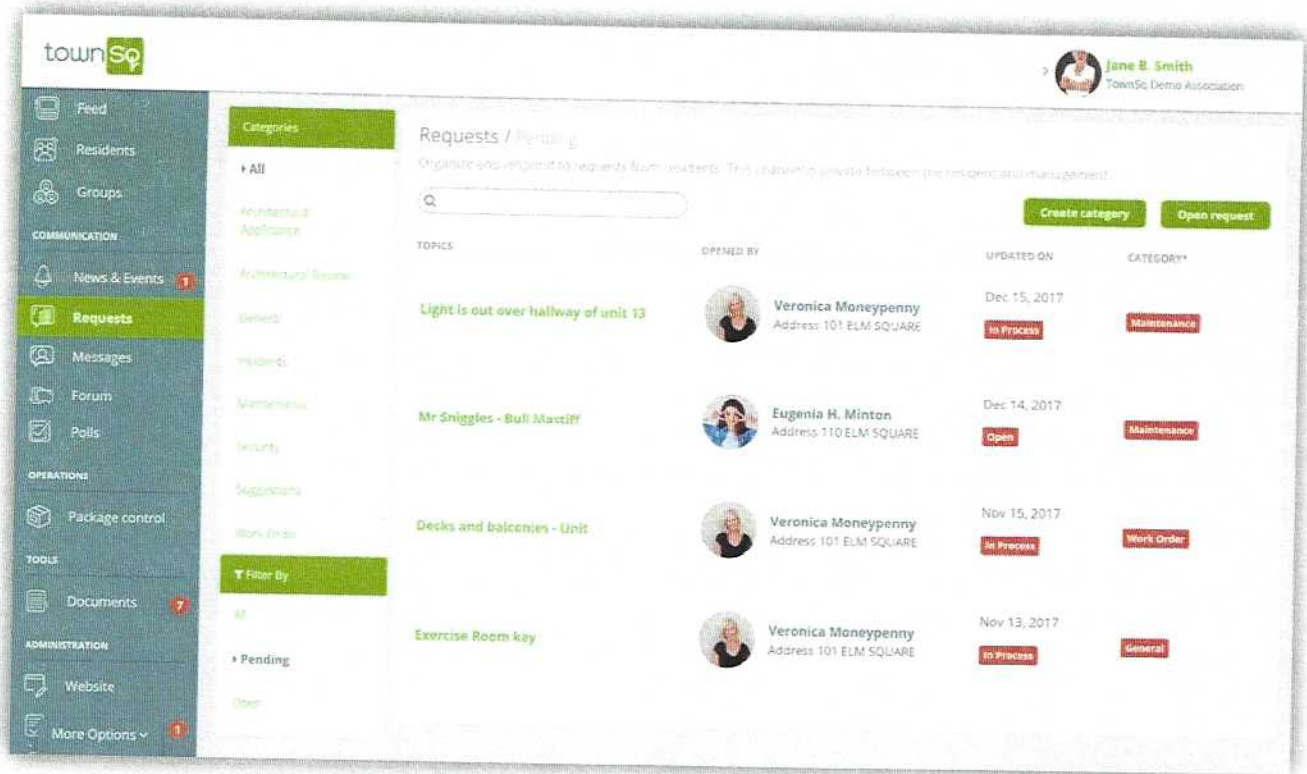
VOLO VILLAGE™ provides easy-to-use community notification technology to keep your communities informed and connected. Important email, voicemail and text messages can be shared quickly and efficiently to your entire community, or a selected group of residents.

- ✓ **Voice Message** - Instantly send recorded voice messages to residents and owners!
- ✓ **Email Message** - Send email message in plain-text or HTML. You can even include attachments!
- ✓ **Text Message** - Send text messages to select residents and owners, or to the entire community!

B. PROCESS FOR HANDLING RESIDENT SERVICE REQUESTS

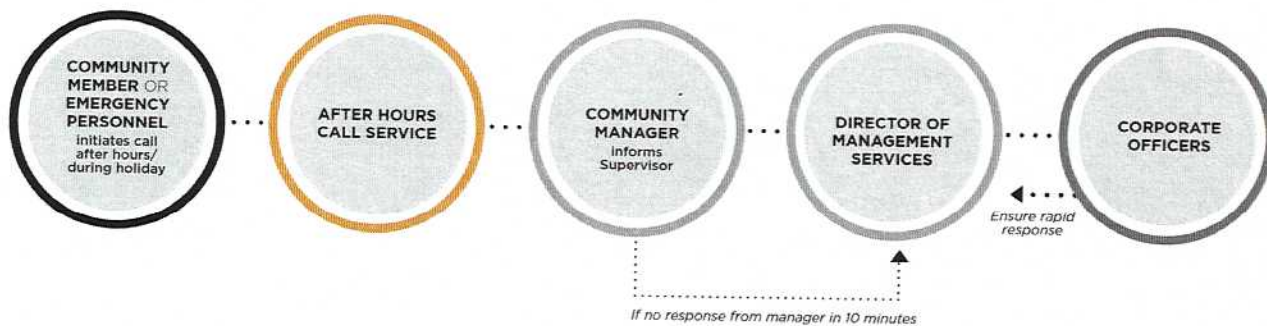
Tracked Work-Orders and Effective Task Management via TownSq (Pronounced “Town Square”) - TownSq, our revolutionary communication system, brings a web-based and mobile application to each owner and Board Member we serve. This platform allows owners to log work-orders and gives Board Members full visibility into reporting to ensure that we are quickly and efficiently resolving requests. Additionally, TownSq offers a task management module that provides seamless reporting on our resolution of open items.

If an owner or Board Member is not comfortable using TownSq, we will record any requests submitted via phone or email to our office into TownSq so that a proper trail is established, monitored, and tracked to completion.



AFTER-HOUR EMERGENCIES

We employ a call center to handle all after-hour emergencies. The resident leaves a message with the “live” operator who in turn contacts the manager. If the manager does not respond to the operator within five minutes, the call is escalated to a member of senior leadership. Should he/she fail to respond within five minutes, the call is escalated to the President. Additionally, Board Members will be provided with the cell phone numbers of the manager and senior team.



C. MAINTENANCE AND ENHANCEMENT OF COMMUNITY

INSPECTION & PREVENTATIVE MAINTENANCE ROUTINES

Inspections provide the information to make decisions. We will create operation checklists to define when an inspection should occur and what needs to be inspected. If a deficiency is found that requires repair or

replacement or if a scheduled preventative maintenance routine is due, the completed checklist serves as the trigger to get an action item approved and the work completed.

Preventative maintenance is much more cost effective than a simple program of corrective maintenance wherein components are repaired or replaced after they break. The preventative maintenance routines are specified by the equipment manufacturers and are designed to reduce or eliminate equipment failure during normal day-to-day operation. Reduce failures, and you will reduce costs.

The components of the property will be serviced at regular intervals and records updated to maximize the property value. If the required is deferred, the components experience a slow, gradual deterioration, resulting in premature failure. By using checklists and acting on the information found, minor problems can be corrected, and preventative maintenance can be completed.

OPERATION CHECKLISTS

Using checklists ensures that all components will be checked for maintenance needs on a schedule recommended by product manufacturers and/or industry standards. In the process of inspecting, the inspector will discover and report minor situations before they become problems. We will follow our best practice of establishing daily, weekly, monthly, quarterly, semi-annual, and annual checklists.

Project	Jan	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec
Boiler Cleaning	As needed											
Carpet Cleaning												
Cooling Tower Chemicals		x			x			x		x		
Elevator Inspection				x							x	
Paint Interior												
Paint Exterior								x	x	x	x	
Power Wash Garage												
Re-Stripe Parking Spaces												x
Inspect Pool for Compliance					x							x
Inspect Drains/Gutters	x	x	x	x	x	x	x	x	x	x	x	x
Dumpster Painting												
Window Washing												
Window Wash Support	every 6 years				x					x		
Mechanical Maintenance	x	x	x	x	x	x	x	x	x	x	x	x
Evaluate Furniture												
A/C Filter Change		x			x			x			x	
Lobby/Elevator Floor Polishing												
Elevator Metal Refinishing	As budget permits											
Ins. Fire Alarm System	By Simplex Grinnell											
Fire Extinguishers								x				
Fire Pump Inspection											x	
Generator Inspection	By on site staff											
Mechanical Cleaning	x	x	x	x	x	x	x	x	x	x	x	x
Pool Furniture												
Riser Balancing	As needed											
Touch Up "Reserved" Parking Markings												
New linens for Guest Suite		x										
A/C Vent in hallways ~ Cleaning	By on site staff											

Figure 14 - Sample PM Calendar

Emergency Generator

NOTICE
MECHANICAL ROOM
NO STORAGE
PERMITTED

Control Panel Manual start button Fuel Tank Battery Charger

Location: Ground level floor, next to the domestic pumps and fire pump.

Description: A 400kw generator that provides emergency power during a power outage to elevators, fire pump and lighting. The system runs on diesel fuel with a 500 gallon sub base tank. The system is currently on a timer for weekly exercise.

Generator	Frequency	Tools
Take weekly readings of before and after run times. Use log sheet provided for specific readings. Take hour meter readings	Weekly	Log Book
Keep the generator and floor free of dust and debris.	As required	Cleaning Material
Check oil level, Water level, Heaters(Feel inlet and outlet heater hoses for warmness) Make sure belts are tight (make sure engine control is off when touching belts). Check battery charger voltage out put, Check battery water level, check for oil, water and fuel leaks. Take readings when under load for amp, volts, frequency, oil pressure, and water pressure.	Weekly	Gloves, eye protection and rags
Load transfer	Monthly	None
Load Bank	Annually	Supplemental Load

- Information on required NFPA testing will be attached to this file.
- Supplemental load testing will avoid "Wet Stacking"
- *Keep safety Goggles, chemical gloves, eye wash and ear protection in the generator room.

Figure 15 - Excerpt from PM Manual

Rotation	Duties	Date	Initials	Date	Initials	Date	Initials	Date	Initials	Date	Initials	Date	Initials
Bi-Weekly	Exterior Glass 1st Floor												
	Lobby Detailing/Cobwebs												
	Wifi Detailing												
	Gym Detailing												
	Breakroom Detailing & Buff												
	Elevator Tile Scrub												
	Elevator Track Clean												
	Stairwell - B2 - 9th (doors/sweep)												
	Stairwell - 10th - Pool (doors/sweep)												
	Wash Trash Cans (Garage)												
Dust Fire Extinguishers													
Monthly	Power Wash Mats												
	Interior Glass 1st & 2nd Flr												
	2nd Flr Tile Scrub												
	2nd Floor Tile Detailing												
	Clubroom Detailing												
	3rd Terrace Detailing												
	Back Lounge Detailing												
	Pool Area Detailing												
	B1 Garage (Sweep, Cobwebs, Mirror)												
	B2 Garage (Sweep, Cobwebs, Mirror)												
1st Garage (Sweep/Cobwebs/Mirror)													
2nd Garage (Sweep, Cobwebs, Mirror)													

Figure 16 - Sample Janitorial Checklist

Associa Gulf Coast is an Accredited Association Management Company (AAMC®) that specializes in managing communities along Florida's Gulf Coast. Established in 1979, We have over thirty-nine years of progressive community management experience, and due to our local expertise, insistence on unrivaled customer service, and industry-leading programs, we have become known as leaders in community management throughout Florida. Our company and the experts we employ know exactly what it takes to not only operate communities like yours successfully, but to grow them in a way that builds value for all of your members.

E. COST CONTAINMENT AND REDUCTION

Associa Gulf Coast is a member company of Associa, the undisputed leader in community management throughout North America. As a member firm of Associa, we are able to pool our resources with other firms to create programs and cost savings for your community few can match. Associa is able to leverage the buying power of over 4 million members to identify costs and increase services to each of its communities, and with over 10,000 associations in our portfolio, Associa has the depth and resources to create the programs and technological infrastructure required to effectively manage your community.

ASSOCIA ADVANTAGE

Associa Advantage® is an unparalleled advancement in the association management industry, in that Associa is the only firm that has the nationwide relationships to negotiate savings and discounts for our members and associations. Associa offers this value-added service at no cost to our communities, and it is one example of how we constantly strive to deliver exceptional value. By leveraging the purchasing power of millions of members, Associa Advantage offers savings of up to 65% at leading national and local service providers. From paint to pest control, carpet to cabinets and garage doors to gutters, your association and members benefit from the licensed, certified and insured companies within the Associa Advantage Network. Visit <http://www.associaadvantage.com> for more information.

COMPETITIVE BIDDING

Depending on the scope of work, and for projects expected to exceed a certain monetary threshold, the Manager and/or Project Manager (qualified architect, engineer, and/or trade professional) would follow the process below:

1. Identify service/project requirements.
2. Prepare scope of work – either by vendor, manager, or professional, depending on the nature of the project and the expertise required to define the scope.
3. Solicit the minimum of at least three bids from reputable companies. All bidders must have the appropriate license(s), certification(s), and insurance to perform the work defined in the scope. Credentials are typically reviewed, managed, and approved by an independent, third-party professional credentialing service used by our firm.
4. Bid analysis is compiled by management or other professional and presented to the Board of Directors for review and selection.
5. Bids are presented and signed by the Board of Directors upon selection of a contractor.

All vendors utilized must bring value and quality of work to our clients before thoroughly being vetted. We have partnered with a third party, Enterprise Risk Control (ERC), to take vendors through Associa Vendor Access compliance process to ensure accuracy of vendor information.

As the leader in community association management, we want the best for our communities. By doing verifications on vendors and ensuring we have appropriate documentation for items like W9's and insurance certificates, we are adding another level of safety and security for the communities we manage and raising the standard for quality of service for our associations and the industry.

As the management company of record, we have a duty to our clients to ensure that we do everything within our power to look out for their best interest. This includes ensuring that all vendors meet predetermined minimum requirements as set forth in our management agreements and the communities governing documents.

By implementing Associa Vendor Access, not only are we providing greater security for our clients but, we are also streamlining the Vendor's interaction with Associa allowing for them to centralize and track all of their important documents and uploaded invoices. Vendors are able to track the status of their payments by logging into the system. Vendors will be more visible after compliance to other associations and managers which will allow for greater opportunity to grow their business.

General Information

1. BRIEF SCOPE OF SERVICES REQUESTED (Additional detail provided in Attachment "A"):

The Board of Directors of Celebration Management Services, Inc. is seeking proposals from qualified vendors to provide complete landscape management services to the Board of Directors of Celebration Management Services, Inc. and Associa to obtain bids to provide complete landscape management services.

2. COMMENCEMENT OF SERVICES/TERM:

The services and work to be provided by the Contractor shall continue for a term of 12 months beginning May 1, 2017. This Agreement will renew automatically at the end of the initial term and will continue to renew at the end of each successive 12 month term unless cancelled by either party with written notice of no less than 30 days' notice - Agreement can be cancelled at any time without cause.

3. VENDOR QUALIFICATIONS:

The contract, if awarded, will only be awarded to a responsible Proposer who is qualified by experience to do the work specified herein. The Proposer shall submit with its proposal satisfactory evidence of experience in similar work and show that it is fully prepared with the necessary organization, capital, and equipment to complete the work to the satisfaction of the Association.

4. RFP SCHEDULE:

Event	Date
RFP Release	4/1/17
Proposal Responses Due	4/15/17
New Contract in Place	5/1/17

5. SITE VISIT

Proposers are encouraged to make on-site visits to the area for which services are required in order to gain an understanding of the scope of the area to be served. The Proposer must be familiar with the area and any natural features which will affect the work. Ignorance on the part of the Proposer will in no way relieve it from responsibility.

6. SUBMISSION OF PROPOSAL

Responses to this RFP must include the following information:

- Identify your company name, address, city, state, zip code, telephone, and fax numbers.
- Identify any parent corporation and/or subsidiaries and affiliations, if applicable.
- Provide a brief overview of your company including the number of years in business, number of employees, nature of business and description of clients.
- Include the names and bios of the firm's principal officers.
- Identify the name, title, address, phone, fax number, e-mail address of the primary contact person and supervisors.
- Provide a narrative description of the Proposer's approach to providing the services as described in the scope of services, provided herein. (Limit to 3 pages).
- Three References, including the name, address, and phone number of a contact person, from projects of similar size and scope (See List of References Form)

EXHIBIT A - LANDSCAPE MANAGEMENT SERVICE PRICING SHEET

To ensure consistency and for proper analysis, pricing submission should follow the format reflected. Prices should include all labor, material cost, sub-contracted expense, overhead, and tax.

A. Common Area Description of Services	Year 1	Year 2	Year 3	Three Year Total
		(if renewed)	(if renewed)	
I. Mowing - Includes edging, string-trimming, blowing and/or vacuuming.	\$	\$	\$	\$
II. Detailing - Shrub pruning, tree pruning, palm pruning, weeding and general cleanup of the entire property - Monthly Leaf Pick-Up	\$	\$	\$	\$
III. Fertilization/Chemical Treatments	\$	\$	\$	\$
IV. Irrigation	\$	\$	\$	\$
V. Mulch	\$	\$	\$	\$
GRAND TOTAL	\$	\$	\$	\$

Proposer must provide the following information in addition to other bid requirements:

- Common Area
 - Total square feet of turf area by type:
 - St. Augustine _____ (sf)
 - Total square feet of ornamental bed areas:
 - Ornamental Bed Areas _____ (sf)
 - Mulch Quantity _____ (per application)
 - Total square feet of annual flower bed areas:
 - Annual Flower Bed Areas _____ (sf)
 - # of Flowers Proposed _____ (per rotation)

Figure 17 - Sample RFP

F. OFFICE/COMMON AREA UTILIZATION

It is assumed that we will make use of the current management office and other space(s) reserved for employee use. We will need to better understand the final staffing model and building layout to determine how to maximize the effectiveness of these areas.

G. OBLIGATIONS OF MANAGEMENT AND INTRODUCTION FIRM'S LEADERSHIP TEAM

What follows is an overview of the services we will provide as managing agent of the Association. This is not an all-inclusive list as we will tailor our scope of work to meet your community's needs.

Management Oversight

- 365 Days – 24/7 Oversight of Operations
- Ensure branch operations reflect the highest management standards
- Liaise between Branch & Owners
- Liaise between Homeowner Board and legal, local authorities, etc.
- Ensure compliance with Governing Documents
- Negotiate and implement multiple service contracts
- Contract bid processes
- Daily oversight of multiple independent contractors
- Insurance bid, oversight and claim administration
- Provide training and Board orientation to Board members
- Work with individual Board members in execution of duties
- Advise the board in performance of duties
- Ensure annual meeting complies with governing documents and Florida State Statutes
- Organize, manage Association Annual meeting
- Arrange and manage Annual Election process
- Organize, manage and report regular Board meetings
- Develop/implement emergency response process
- Ensure 365/24-7 emergency response personnel
- Prepare/track monthly action items by responsible party
- Attend, Board, annual and special committee meetings
- Meet with contractors, owners and local officials
- Develop process/functionality of committee structure
- Establish committee structure or/in Document compliance
- Develop Administrative and Operating Resolutions for Board of Directors
- Establish due process for Board of Directors decision challenges
- Manager owner notice, preparation, meeting setup
- Take/advise/review/maintain minutes of meetings
- Maintain Association books and records and Resolutions
- Conduct general site inspections of community
- Monitor and maintain Association's website (if Association chooses to establish one)
- Maintain annual management calendar
- Prepare/transmit routine owner communications
- Provide customer service throughout the community
- Produce and provide required reports for new or resale units
- Explain/determine Association vs. Homeowner maintenance responsibility
- Provide national resource library for Manager use
- Provide interactive national intranet for Manager idea sharing
- Provide specialized managerial/leadership training

Accounting

- Assessment collection
- Set up and maintain individual owner account data
- Remove prior owner data
- Change owner account information as advised
- Customer Service to individual owners regarding their account
- Manage, maintain, report delinquencies
- Interface with legal counsel/delinquencies
- Respond to individual owner account inquiries
- Work with delinquent owners to remedy (if necessary)
- Prepare account statement for resale
- Project yearend numbers, prepare working draft of budget
- Make cost savings recommendations
- Prepare schedule of per unit assessment
- Maintain AP weekly process and timeline
- Follow up on internal or vendor invoices
- Review account balance for vendor payment
- Prepare AR monthly account reconciliation
- Deposit assessment and misc. income
- Reconcile credit card payments
- Investment information to Manager for BOD direction
- Secure investment rates for BOD action
- Open new investments, signature cards, etc.
- Calculate and report reserve activity
- Reconcile monthly bank statements
- Prepare monthly financial statement
- Ensure account compliance with AICPA guidelines
- Coordinate independent annual audit
- Ensure tax payments and timely reporting
- Provide Board training on reading financial statements
- Prepare delinquency collection reports for court (if necessary)
- Attend court and testify as to delinquencies (if necessary)
- File or track filing of liens (if necessary)
- Work with Attorney to foreclose (if necessary)

Computerization

- Provide and support critical management software/systems
- Software interface with banking institutions
- Software interface with coupon supplier
- Connectivity and maintenance of site systems
- Per owner, setup direct Debit assessments/collection (EFT)
- Transmit and track direct Debit file to bank
- Automated coupon assessment payment (Lock box)
- ACH banking transfers
- Ensure data backup and offsite storage facility
- Maintain and monitor system/data security
- Develop special reports
- Support independent auditors with special reporting
- Set up per community delinquency processes

- Make database changes for charges, ownership
- Develop reports required for legal discover process
- Maintain database daily and install upgrades
- Maintain security software to protect client funds
- Provide software and user support to client sites
- Sign in information changes for Direct Debit for bank merger
- Work with owners to make Direct Debit account changes
- Provide managers with software to track operation issues
- Work with software developer to make enhancements
- Prepare special reports for annual meeting voting

Maintenance

- Ensure property is maintained to the highest level
- Conduct site inspections
- Prepare contractor qualification sheets
- Receive/dispatch/follow-up on service requests
- Monitor and implement scheduled maintenance
- Provide team/process after-hours emergencies
- Ensure federal/state/local code compliance
- Develop non-tech bid specifications
- Prepare/manage process for work proposals
- Review bids, check references/insurance
- Recommend contract bid awards
- Monitor contract conformance
- Ensure proper maintenance of property within budget
- Maintain annual maintenance calendar
- Maintain original certificates of insurance
- Initiate development/review of reserve studies
- Advise whether onsite or outsource work
- Develop disaster management and PR plans
- Provide Managers with seasonal maintenance reminders
- Gather/share contractor information by/with Managers
- Ensure contractor performance via total clientele spend
- Provide specific training to Managers on maintenance
- Implement cost saving maintenance ideas
- Research material/costs to ensure best buy

Architectural Compliance

- Ensure a high level of "curb appeal" is maintained
- Develop and apply Architectural Guidelines
- Establish processes for modifications
- Establish processes for violations
- Identify level of subjectivity for compliance
- Develop owner letters regarding modifications and violations
- Per community, define and input Architectural Guidelines
- Provide services within legal timeframe
- Establish due process for appeals
- Set up appeals process/manage meeting
- Respond to owner calls of violation complaint

- Conduct inspection to ensure compliance
- Send letters of non-compliance to owners
- Follow up customer service calls regarding violation letters
- Track timeline for violations and follow up
- Work with owners on process/requirements to modify
- Process applications for change(s)
- Prepare Committee modification requests meeting
- Transmit decision of Committee to owners
- Review files for Resale Package notification
- Enter all data into system for tracking
- Generate reports on modification requests
- Generate reports on outstanding violations

Human Resources

- Recruit for, screen, and train all site personnel
- Conduct criminal and financial background checks
- Provide training in areas of responsibility
- Provide high performance standards for Customer Service
- Conduct specific Customer Service training
- Maintain benefit package to attract top staff
- Administer benefits program
- Provide daily personnel oversight
- Ensure labor law compliance
- Maintain employment agreements
- Prepare Job Descriptions
- Maintain Employee Handbook
- Provide employee recognition/reward program
- Provide free online education curriculum
- Required training via professional development CS programs
- Required training via VTC for CAI credential program
- *Provide timesheet/payroll administration
- *Provide health benefits administration
- *Provide 401k administration
- *Maintain overtime, vacation, sick/loss time and other policies report
- *Monitor required coursework and credential requirements
- *Provide reports for independent auditors
- *Process all employment taxes and reports
- *Ensure liability, workers compensation and fidelity insurance coverage
- *Maintain employment files
- *Administer COBRA as required
- *Administration of garnishments
- Respond to employee complaints
- Develop employee evaluation criteria
- Perform employee evaluation criteria
- Perform employees performance evaluations
- *File 941's
- *Provide W-2's (Agents employees only)
- Maintain software for support of HR functions
- Train site supervisors on personnel management (Agent's employees only)