



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.*

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