Proposal for
Management Services
for
XYZ Association

ManAge, Inc., (MANAGE) a community association management company, is owned by I. A. Perfurt and I Doitrite. Both are licensed Community Association Managers, and Ms. Perfurt a Supreme Court certified county mediator. They have been involved in condominium management, education, and training since 1986. Both have served as president of condominium boards of directors, and Mr. Doitrite served as president of a master association board, during which he wrote policies & procedures for all aspects of operating the association – from landscaping & pool maintenance, to screening residents and enforcing use restrictions and rules & regulations.

Mr. Doitrite and Ms. Perfurt have developed procedures to carry out records management, budgets and financial responsibilities, and general operations. Through MANAGE, they have provided management services to condominiums and HOAs. Resferences are available upon request.

This Proposal is for the provision of management services to the XYZ Association (XYZ Association) by ManAge, Inc. (MANAGE).

Services
MANAGE proposes to provide or arrange for the provision of the following:

1. Financial Services:
   (a) Assist board in assessment of association's financial needs for the year, and, as appropriate, in development of financial strategies to minimize the impact of proposed increases on the unit owners
   (b) Develop and monitor annual operating and reserve budgets, including periodic revisions as directed by the board
   (c) Maintain computerized financial records including, but not limited to, individual unit owner accounts, bank accounts, and delinquent unit owners accounts
   (d) Arrange for and monitor coupon or lock box system for receipt of monthly maintenance checks and special assessments
   (e) Prepare and mail notices to late payers; coordinate with the XYZ Association attorney regarding required legal action for collection of delinquent accounts and other relevant legal matters
   (f) Deposit checks to XYZ Association bank account(s)
   (g) Prepare checks to pay invoices and other legitimate expenses
   (h) Deliver to President and Treasurer on a monthly basis copies of financial records, including but not limited to accounts payable ledger, accounts receivable ledger, and most recent bank statements
   (i) Periodic review of financial reports with board

(j) Oversight of the preparation of an end-of-year report (Annual Report) and tax returns by a CPA experienced in condominium accounting, in compliance with F.S. 718 (Condominium Act) and F.A.C. 61B.

2. Meetings:
   (a) Prepare, document and post meeting notices for board and member meetings, and, upon request, committee meetings (Note: staffing of committee meeting is an additional fee).
   (b) Prepare agenda packages for directors and officers. Meet with each separately to review agenda items.
   (c) Mail meeting notices (when necessary)
   (d) Coach treasurer to present financial report.
   (e) Provide staff support at board of directors and unit owner meetings called by president
   (f) Take minutes at board of directors and unit owner meetings called by president
   (g) After approval by board or members, finalize minutes and obtain signature of Secretary and President on approved minutes. Place in minute book.

3. Property Management Services:
   (a) Conduct inspections of property (grounds and buildings) no less than every two weeks, with maintenance supervisor or other appropriate staff or vendors
   (b) Advise president of necessary preventative maintenance and repairs
   (c) Obtain appropriate professionals to assess the preventative maintenance, repair, and deferred maintenance requirements of the condominium physical structures, as necessary
   (d) Develop and distribute bid specifications to vendors for maintenance, insurance, and other required items, with the assistance of professionals
   (e) Obtain copies of vendor licensure and insurance, and ensure that XYZ Association is a named insured
   (f) Evaluate and, upon board request, recommend bids and vendors to board of directors, and, as requested by board, negotiate contracts with selected vendors and professionals
   (g) Arrange for review of contracts and service agreements with association attorney.
   (h) Arrange for provision of necessary services upon approval of contracts
   (i) Supervise, monitor and evaluate performance of contracted and employee services. Provide weekly report to President and monthly report at board meetings
   (j) Ensure that periodic required inspections are completed, including but not limited to termite and pest inspections, inspections of fire and smoke detection equipment, inspection of generators, inspection of plumbing and a/c fixtures for leaks, etc.
   (k) No later than April of each year, review and upon XYZ Association Disaster Plan. Update phone numbers and emergency contractor contacts. Update list of residents who may need assistance in an emergency, and coordinate with local officials.
   (l) Arrange for pre-hurricane maintenance no later than April of each year.

4. Document and Rule Enforcement:
   (a) Review board adopted rules and regulations, assisting the board in applying such rules fairly and equitably, and advising the board when it appears that rules may need revision
   (b) At president's direction, write letters to unit owners advising them of rule violations

(c) Coordinate with XYZ Association attorney to ensure enforcement of documents and rules
(d) Process transfers of units (sales, lessees & other conveyances)

5. Other Services:
   (a) Conduct annual election
   (b) Respond to questions from the board on condominium management issues
   (c) Respond to resident complaints and problems
   (d) Maintain records; providing access to records as permitted by F.S. 718, applicable rules and association documents
   (e) Maintain up to date roster of unit owners
   (f) Coordinate with the XYZ Association attorney regarding other relevant legal matters
   (g) Provide updates on projects to president and board as required; provide periodic written management reports to the board, which will include major activities undertaken during said period
   (h) Provide other services as may be agreed upon from time to time by the parties, and as permitted within the constraints of the contract.

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Staffing:
MANAGE will provide an on-site licensed Community Association Manager on a full time basis. This includes coverage by a C.A.M. during any vacation time taken by the assigned manager.

Requested Information

MANAGE will request that XYZ Association provide copies of the following documents as available:

- Declaration of Condominium, Articles of Incorporation, Bylaws, including any amendments to such documents, properly adopted rules and procedures
- Names, addresses, and telephone numbers of all unit owners and renters
- Records of use restriction actions taken against current unit owners
- Current and prior year's budgets
- Annual financial reports for past two years
- Financial reports for current year
- Financial records for individual unit owners including status of delinquent unit owners
- Insurance Policies
- XYZ Association plans, diagrams and specifications
- Report of any current legal action(s) affecting or potentially affecting XYZ Association
- All current contracts
- Records of rehabilitation and repair for past year

Compensation

MANAGE proposes that XYZ Association pay the sum of $70,200 annually ($5,850 per month), plus other reasonable expenses incurred in the provision of the above services to XYZ Association. Such expenses may include, but not be limited to, stationery, printing, postage, computer/printer supplies, translation services, and long distance telephone calls.

XYZ Association would be responsible for actual cost of coupons or lock box services, financial compilations, reviews & audits, and preparation of tax returns for payment of all professional consultants and outside contractors, including contractors used for emergency repairs, and for attorney services.

MANAGE provides receipts or other documentation of expenses with invoices. MANAGE bills additional expenses as follows: copies produced in-house at $.05 per page per side (black & white), $.25 per page per side (color), $.10 per #10 envelope, and the estimated cost based up-on the most current Office Max catalogue, including tax, for all other items, plus actual cost of postage.

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References

Del Boca Vista Community
10000 NW 1 Street
Ococo, Florida 34422

LandsEnd HOA
2222 Eagles Point Place
Orlando, Florida 32323

Hurricane Fields
1234 Windswept Drive
Key Qwest, Florida 33322