



COMMUNITY. PARTNERSHIP. ASSOCIA.

PROPOSAL FOR FULL SERVICE MANAGEMENT

PREPARED BY ASSOCIA HILL COUNTRY

October 13, 2021



RE: Request for Proposal

Dear Board of Directors,

Thank you for the opportunity to present Associa Hill Country to the Bradford Park Homeowners Association board of directors. We have been providing the full spectrum of management services to communities like yours for over 40 years, and we know better than anyone else how to deliver exceptional community management as well as what it takes to make your association a success.

Enclosed you will find a detailed proposal regarding the many services we recommend for your community based on our assessment. In it, we go beyond explaining the features of each offering and our approach to delivering them by expressing their true value. Because our services have helped each one of our current client communities thrive, we're sure they'll do the same for your community.

We're confident that what Associa Hill Country offers is far beyond what you will find anywhere else. Please review this proposal and let us know if we can provide any additional information you may need.

Once again, thank you for the opportunity to submit our proposal for the professional management of your association.

Sincerely,

Christiana Ennis
Business Development Manager
Associa Hill Country - Austin
(512) 993-1281
christiana.ennis@associa.us

THE MOST SUCCESSFUL COMMUNITY ASSOCIATIONS ARE POWERED BY ASSOCIA.

Associa manages more than 14,000 communities that are home to over 5 million homeowners, and we've earned our leadership position. With more than 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 Hill Country leadership team has decades of broad and deep experience managing active adult communities, lifestyle-centric associations, single-family home communities, condominiums, urban and high-rise properties, 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

“

“I have received excellent service from Monique Williams and Amber Tatum recently. Our condo association, (Balcones Place Neighborhood Association) in Austin Texas, has been transitioning to Associa from another management company. I had two issues which your personnel acted flawlessly and resolved both issues ‘quickly and professionally. I have given this feedback to our Board.”

– Mr. Klaskin

”

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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



“I WANT TO THANK JOE FOR THE EXCELLENT JOB HE DID ON POWER WASHING AND PAINTING MY DECK. HE EXPLAINED EVERYTHING HE WAS GOING TO DO AND HOW LONG IT WAS GOING TO TAKE AND GOT IT DONE. HE WAS FRIENDLY AND PROFESSIONAL. THIS IS THE 3RD PERSON WHO HAS DONE SOME WORK AT MY HOME FROM YOUR COMPANY AND THEY HAVE ALL BEEN PROS!”

-JEAN D.





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.



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



“I WANTED TO LET YOU KNOW HOW WONDERFUL ROSALINDA IS. SHE CONSISTENTLY GOES ABOVE AND BEYOND TO ASSIST US. SHE IS VERY RESPONSIVE AND AS BUSY AS I KNOW SHE MUST BE ALWAYS GETS US WHAT WE NEED VERY QUICKLY. WE WORK WITH A LOT OF HOA'S AND SHE IS DEFINITELY MY FAVORITE TO WORK WITH AS I KNOW I CAN ALWAYS COUNT ON HER TO PROVIDE US WITH THE INFORMATION WE NEED TO PROVIDE ON TO YOUR FUTURE CUSTOMERS.”

– JENNIFER W.



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.

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

OUR PRICING AND FEE STRUCTURE

MANAGEMENT FEE:

\$985.00 per month

One-time setup fee: \$350.00

(Includes bi-monthly (24) community inspections and quarterly (4) board meetings per year.)

AT-A-GLANCE FULL SERVICE MANAGEMENT PROPOSAL INCLUDES

- Deed restriction and rule enforcement - Conduct Monthly (12) inspections of the community per year
- Drafting of annual budgets
- Care and oversight of common areas
- Screening and assistance in selection of vendors
- Provide accounts payable and financial accounting services
- Full Customer Service Department for residents (phone calls, emails)
- Full service collections department with oversight of Payment plans and can include Title Searches, Credit Bureau Reporting and Lien placement
- Key documents - On demand - Resale transaction processing platform that securely delivers critical property information to Realtors, Title Companies, Attorneys and Mortgage Companies
- After Hours call center for emergencies
- ***Complimentary TownSq App makes managing communities easy - community management teams and boards can post announcements, access governing documents and financials, view open violations and account balances, and more - any time on any device! With TownSq, residents can manage their account, pay online, get up-to-date community news and events, request and review status of service inquiries, and more - any time from any device.***
- Architectural Control: Smartwebs Architectural Control ARC Manager Software
- Access to discounted insurance premiums exclusive to Associa clients via AIAI
- Complimentary enrollment to Associa Advantage for all Association Members providing discounts to clients on household goods and services by leveraging Associa's large client base (ex. Home Depot, Sherwin Williams, Orkin, 1800Flowers, and/or other high-quality providers)

Thank you for the opportunity to present how we can work with your community to achieve its vision. If you have any questions about anything you've read in this proposal, please reach out to Christiana Ennis at christiana.ennis@associa.us. We look forward to the possibility of becoming your community management partner and helping your community thrive.



Subject: RE: Hello From Associa

From: Christiana Ennis <Christiana.Ennis@associa.us>

Date: 10/13/21, 15:28

To: "Keith A. Lindsey" <kalecomm@gmail.com>, jamie lodes <jclodes@att.net>, "noblefj@tutamail.com" <noblefj@tutamail.com>, Molly Salzwedel <mollyonmissions@gmail.com>

Good Afternoon,

I hope that everyone is having a wonderful Wednesday. Attached you will find our proposal for association management. Below are some bullet points from the proposal that outline our core services. Please feel free to reach out to me with any questions, and let me know when might be the best time to discuss next week. Have a great day.

Full service management w/Portfolio Manager

Monthly Fee

\$985.00

Set Up Fee: \$ 350.00

Our proposal Includes:

- Attendance at your meetings of the Board of Directors ***no less than 4 per year as requested***
- Coordination of and attendance at annual members meeting
- Board Member training and quarterly informative webinars
- Deed restriction and rule enforcement - Conduct inspections of the community ***twice per month***
- Community visits by management team on a regular basis
- Drafting of annual budgets
- Care and oversight of common areas
- Screening and assistance in selection of vendors - Meeting with and obtaining bids, inspecting work progress and coordination.
- Provide accounts payable and financial accounting services
- Full Customer Service Department for residents (phone calls, emails)
- Full service collections department with oversight of Payment plans and can include Title Searches, Credit Bureau Reporting and Lien placement
- Key documents - On demand - Resale transaction processing platform that securely delivers critical property information to Realtors, Title Companies, Attorneys and Mortgage Companies
- After Hours call center for emergencies
- ***Complimentary TownSq App makes managing communities easy - community management teams and boards can post announcements, access governing documents and financials, view open violations and account balances, and more - any time on any device! With TownSq, residents can manage their account, pay online, get up-to-date community news and events, request and review status of service inquiries, and more - any time from any device. Please check out TownSq at: <https://www.youtube.com/watch?v=bwlvjlltuV8&t=2s>***
- Architectural Control: TownSq ARC Management
- Access to discounted insurance premiums exclusive to Associa clients via AIAI
- Complimentary enrollment to Associa Advantage for all Association Members providing discounts to clients on household goods and services by leveraging Associa's large client base (ex. Home Depot, Sherwin Williams, Orkin, 1800Flowers, and/or other high-quality providers)

Thank you,

Christiana Ennis, CMCA
Business Development Manager

Associa® – *Delivering unsurpassed management and lifestyle services to communities worldwide.*

Office: 503-332-2047

4009 Banister Lane Suite #300 Austin, Texas 78704

Direct: 512.347.2895

Office: 512.328.6100

Cell: 512-993-1281

Fax: 512.328.6178

Email: Christiana.Ennis@associa.us

Visit us online: www.AssociaOnline.com



"I hope I was able to assist you today. If you could, please take a moment to rate my customer service by clicking one of the links below. Providing valuable feedback only takes a second!"



From: Keith A. Lindsey <kalecomm@gmail.com>

Sent: Tuesday, October 12, 2021 2:04 PM

To: Christiana Ennis <Christiana.Ennis@associa.us>; jamie lodes <jclodes@att.net>; noblefj@tutamail.com; Molly Salzwedel <mollyonmissions@gmail.com>

Subject: Re: Hello From Associa

[EXTERNAL EMAIL] This email originated from outside of Associa.

Team:

I just got off the phone with Christiana from Associa. She would like for us to have a Zoom call to showcase what Associa can do for the HOA. I told her that I'd send this email to y'all and her and I explained where we've come from and where we are at currently with the HOA as well as that we are looking at a dissolution vote down the road. I've copied Christiana on this email so she can let us know what dates/times she's available and we can work that into our schedules.

Christiana told me that Associa likes to have a 60-day overlap window with the existing property management company but can do 30-45 day windows if they have to, however some things may not be fully up and running until the 60-day threshold. She's getting us a bid by Saturday and will send it to all of us to review.

Let me know if any of you have any questions. Christiana, if I've got any of this wrong, please feel free to correct me.

Thanks!

Best Regards,

Keith

On 10/12/21 10:03, Christiana Ennis wrote:

Good Morning,

I received your online inquiry about HOA management. We are eager to speak with you, please let me know when might be a good time to chat.

Thank you,

Christiana Ennis, CMCA
Business Development Manager

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Email: Christiana.Ennis@associa.us

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ASSOCIA IS CERTIFIED AS A
GREAT PLACE TO WORK!

“I hope I was able to assist you today. If you could, please take a moment to rate my customer service by clicking one of the links below. Providing valuable feedback only takes a second!”



— Attachments: —

Bradford Park Proposal.pdf

9.4 MB

Subject: Re: Hello From Associa

From: "Keith A. Lindsey" <kalecomm@gmail.com>

Date: 10/19/21, 19:56

To: Christiana Ennis <Christiana.Ennis@associa.us>, jamie lodes <jclodes@att.net>, "noblefj@tutamail.com" <noblefj@tutamail.com>, Molly Salzwedel <mollyonmissions@gmail.com>

Good evening, Christiana. I'm sorry I missed your question earlier.

For now, until we get this rat's nest unraveled, we are having monthly Board meetings that are open to the membership. Once we have things under better control, we'll decide how to proceed from there. One of the huge problems we've had is apathy from the Board towards the membership and we're moving heaven and earth to undo that.

Team: Christiana would still like to meet with us on a Zoom meeting. Please reply to all with your availability.

Thanks!

Best Regards,

Keith A. Lindsey, MBA

Director,

Owners Association of Bradford Park, Inc.

On 10/15/21 11:01, Christiana Ennis wrote:

Good Afternoon,

Thanks for reaching out. Happy to offer some clarification on the questions below.

Are the monthly meetings board meetings that are open to the members, or working meeting for the board only? Our association managers typically will only attend the board meetings. If the board would like our manager to attend the monthly meetings, that is no problem. This will increase our monthly management fee by \$30.00 per month.

Below are the fees for demand letters and liens?

Late Statement/Friendly Reminder	\$3.25 each
Demand Letter (209 Letter) (billed back to owner)	\$10.00 each
Title Search (billed back to owner)	\$125.00 each
Lien (Billed back to owner)	\$185.00 each
Final Demand Letter (billed back to owner)	\$20.00 each
Attorney Turnover Process (billed back to owner)	\$50.00 each

Thank you,

Christiana Ennis, CMCA

Business Development Manager

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From: Keith A. Lindsey <kalecomm@gmail.com>
Sent: Thursday, October 14, 2021 9:37 PM
To: Christiana Ennis <Christiana.Ennis@associa.us>; jamie lodes <jclodes@att.net>; noblefj@tutamail.com; Molly Salzwedel <mollyonmissions@gmail.com>
Subject: Re: Hello From Associa

[EXTERNAL EMAIL] This email originated from outside of Associa.

Christiana,

Thank you for the bid. We appreciate it. I would like one clarification, though: This bid says that attendance by the property manager will be 4 times per year. We are currently having monthly board meetings. Is there an increased or additional fee to have the property manager at monthly board meetings?

Also, how much are reminder letters to those who are delinquent in paying their dues and what is the fee structure for things like statutory demand letters and liens? This is a pain point for our Association at the moment.

Let us know.

Thanks!

Best Regards,

Keith A. Lindsey, MBA

Director,

Owners Association of Bradford Park, Inc.

On 10/13/21 15:28, Christiana Ennis wrote:

Good Afternoon,

I hope that everyone is having a wonderful Wednesday. Attached you will find our proposal for association management. Below are some bullet points from the proposal that outline our core services. Please feel free to reach out to me with any questions, and let me know when might be the best time to discuss next week. Have a great day.

Full service management w/Portfolio Manager

Monthly Fee

\$985.00

Set Up Fee: \$ 350.00

Our proposal Includes:

- Attendance at your meetings of the Board of Directors ***no less than 4 per year as requested***
- Coordination of and attendance at annual members meeting
- Board Member training and quarterly informative webinars
- Deed restriction and rule enforcement – Conduct inspections of the community ***twice per month***
- Community visits by management team on a regular basis
- Drafting of annual budgets
- Care and oversight of common areas
- Screening and assistance in selection of vendors – Meeting with and obtaining bids, inspecting work progress and coordination.
- Provide accounts payable and financial accounting services
- Full Customer Service Department for residents (phone calls, emails)
- Full service collections department with oversight of Payment plans and can include Title Searches, Credit Bureau Reporting and Lien placement
- Key documents – On demand – Resale transaction processing platform that securely delivers critical property information to Realtors, Title Companies, Attorneys and Mortgage Companies
- After Hours call center for emergencies
- ***Complimentary TownSq App makes managing communities easy - community management teams and boards can post announcements, access governing documents and financials, view open violations and account balances, and more - any time on any device! With TownSq, residents can manage their account, pay online, get up-to-date community news and events, request and review status of service inquiries, and more - any time from any device. Please check out TownSq at: <https://www.youtube.com/watch?v=bwlvjltuV8&t=2s>***
- Architectural Control: TownSq ARC Management
- Access to discounted insurance premiums exclusive to Associa clients via AIAI
- Complimentary enrollment to Associa Advantage for all Association Members providing discounts to clients on household goods and services by leveraging Associa' s large client base (ex. Home Depot, Sherwin Williams, Orkin, 1800Flowers, and/or other high-quality providers)

Thank you,

Christiana Ennis, CMCA

Business Development Manager

Associa® – *Delivering unsurpassed management and lifestyle services to communities worldwide.*

Office: 503-332-2047

4009 Banister Lane Suite #300 Austin, Texas 78704

Direct: 512.347.2895

Office: 512.328.6100

Cell: 512-993-1281

Fax: 512.328.6178

Email: Christiana.Ennis@associa.us

Visit us online: www.AssociaOnline.com



"I hope I was able to assist you today. If you could, please take a moment to rate my customer service by clicking one of the links below. Providing valuable feedback only takes a second!"



From: Keith A. Lindsey <kalecomm@gmail.com>

Sent: Tuesday, October 12, 2021 2:04 PM

To: Christiana Ennis <Christiana.Ennis@associa.us>; jamie lodes <jlclodes@att.net>; noblefj@tutamail.com; Molly Salzwedel <mollyonmissions@gmail.com>

Subject: Re: Hello From Associa

[EXTERNAL EMAIL] This email originated from outside of Associa.

Team:

I just got off the phone with Christiana from Associa. She would like for us to have a Zoom call to showcase what Associa can do for the HOA. I told her that I'd send this email to y'all and her and I explained where we've come from and where we are at currently with the HOA as well as that we are looking at a dissolution vote down the road. I've copied Christiana on this email so she can let us know what dates/times she's available and we can work that into our schedules.

Christiana told me that Associa likes to have a 60-day overlap window with the existing property management company but can do 30-45 day windows if they have to, however some things may not be fully up and running until the 60-day threshold. She's getting us a bid by Saturday and will send it to all of us to review.

Let me know if any of you have any questions. Christiana, if I've got any of this wrong, please feel free to correct me.

Thanks!

Best Regards,

Keith

On 10/12/21 10:03, Christiana Ennis wrote:

Good Morning,

I received your online inquiry about HOA management. We are eager to speak with you, please let

me know when might be a good time to chat.

Thank you,

Christiana Ennis, CMCA
Business Development Manager

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"I hope I was able to assist you today. If you could, please take a moment to rate my customer service by clicking one of the links below. Providing valuable feedback only takes a second!"



Subject: Re: Zoom Meeting at 19:00 (7:00pm) Thursday Nov 4, 2021-Thank You!
From: Christiana Ennis <Christiana.Ennis@associa.us>
Date: 11/5/21, 14:09
To: "Keith A. Lindsey" <kalecomm@gmail.com>, Molly Salzwedel <mollyonmissions@gmail.com>, "noblefj@tutamail.com" <noblefj@tutamail.com>

Hi Keith,

That would not be a problem. We would just set the account up to only receive the friendly notices at the frequency outlined by the board. Then we would not send them monthly collection notices and there would be no \$20 fees.

Thanks, Christiana

From: Keith A. Lindsey <kalecomm@gmail.com>
Sent: Friday, November 5, 2021 1:57 PM
To: Christiana Ennis <Christiana.Ennis@associa.us>; Molly Salzwedel <mollyonmissions@gmail.com>; noblefj@tutamail.com <noblefj@tutamail.com>
Subject: Re: Zoom Meeting at 19:00 (7:00pm) Thursday Nov 4, 2021-Thank You!

[EXTERNAL EMAIL] This email originated from outside of Associa.

Thank you, Christiana. We appreciate you taking the time to talk with us and answer you questions.

On your collections, one thing that would be a show-stopper for us would be the \$20 per month per delinquent account. Our dues are going to be \$170 for the entire year in 2022. At \$20 per month per delinquent account, assuming that the account would be delinquent the entire year, that would amount to \$240 added to a \$170 balance throughout the year. To us, that's unacceptable.

We are looking for \$0 per month added to the account as we are not anticipating a whole lot of effort on the property management company's part for collections. We haven't voted on a new collections policy yet (that's coming), but because our dues are very low, charges to our members like this would be excessive.

Is Associa willing to forgo that monthly charge to each delinquent account? Let us know.

Thanks!

Best Regards,

Keith A. Lindsey, MBA

President,

Owners Association of Bradford Park, Inc.

On 11/4/21 20:48, Christiana Ennis wrote:

Good Evening,

I want to thank you for taking the time to meet with me today. It was a pleasure getting to know you. I have followed up on your question regarding collection fees. Below are our collection fees. We do not have any others noted on any of our fee disclosure documents.

Collections (per Texas state statute)	
Late Statement/Friendly Reminder	\$3.25 each
Demand Letter (209 Letter) (billed back to owner)	\$10.00 each
Title Search (billed back to owner)	\$125.00 each
Lien (Billed back to owner)	\$185.00 each
Final Demand Letter (billed back to owner)	\$20.00 each
Attorney Turnover Process (billed back to owner)	\$50.00 each
Monthly Collection Fee/Handling Charge (billed back to owner)	\$20.00 per month per delinquent unit
***Associa collects when the owner pays the fee	
3 rd Party Credit Bureau Filing (billed back to owner as pass through)	\$55.00
***Associa collects when the owner pays the fee	

Thank you,

Christiana Ennis, CMCA
Business Development Manager

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"I hope I was able to assist you today. If you could, please take a moment to rate my customer service by clicking one of the links below. Providing valuable feedback only takes a second!"



From: Christiana Ennis

Sent: Thursday, November 4, 2021 5:47 PM

To: Keith Lindsey <kalecomm@gmail.com>; Molly Salzwedel <mollyonmissions@gmail.com>;
noblefj@tutamail.com

Subject: RE: Zoom Meeting at 19:00 (7:00pm) Thursday Nov 4, 2021

Good Evening,

I hope that each of you have had a great day. I am looking forward to speaking with you shortly. Please feel free to reach out to me if you need anything in advance of or following our meeting.

Thank you,

Christiana Ennis, CMCA
Business Development Manager

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"I hope I was able to assist you today. If you could, please take a moment to rate my customer service by clicking one of the links below. Providing valuable feedback only takes a second!"



From: Keith Lindsey <kalecomm@gmail.com>

Sent: Tuesday, November 2, 2021 8:03 PM

To: Christiana Ennis <Christiana.Ennis@associa.us>; Molly Salzwedel <mollyonmissions@gmail.com>;
noblefj@tutamail.com

Subject: Zoom Meeting at 19:00 (7:00pm) Thursday Nov 4, 2021

[EXTERNAL EMAIL] This email originated from outside of Associa.

All,

I have scheduled a Zoom meeting for this Thursday at 7:00pm so Christiana can tell us what Associa can do for Bradford Park. If you cannot make the meeting, I will be recording it so that it can be viewed later if need be.

My apologies for not getting this out earlier. Everything and I mean everything came crashing down around me earlier including the news that my elderly Aunt Jan in Lorain, OH fell last night and fractured her hip. She is in the

hospital. She's 84 years old (will be 85 next Tuesday) and a whopping 85lbs and has Alzheimers and Dementia.

So, I ask for all of your prayers.

Thanks! See y'all at the Zoom meeting.

Best Regards,

Keith A. Lindsey, MBA
President,
Owners Association of Bradford Park, Inc.

Bradford Park is inviting you to a scheduled Zoom meeting.

Topic: Bradford Park's Zoom Meeting
Time: Nov 4, 2021 07:00 PM Central Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/88538454194?pwd=blZkOFBxb3RBdHR4ejdiWkcyUFVSZz09>

Meeting ID: 885 3845 4194

Passcode: 389909

One tap mobile

+13462487799,,88538454194#,,,,*389909# US (Houston)

+12532158782,,88538454194#,,,,*389909# US (Tacoma)

Dial by your location

+1 346 248 7799 US (Houston)

+1 253 215 8782 US (Tacoma)

+1 669 900 9128 US (San Jose)

+1 312 626 6799 US (Chicago)

+1 646 558 8656 US (New York)

+1 301 715 8592 US (Washington DC)

Meeting ID: 885 3845 4194

Passcode: 389909

Find your local number: <https://us02web.zoom.us/j/kQYce4ThD>