

8.8.2024

RE: Request for Proposal

Dear Board of Directors,

It is our pleasure to present Associa H.R.W. Management to the Laurel Thicket Property Owners Association Inc Board of Directors. As outlined in this proposal, our experienced community management professionals and value-added services are tailored to serve the specific needs of your homeowners, residents, and each of you as board members.

As your professional management partner, we will use an array of solutions and resources to provide nothing short of an exceptional community management experience. Our highly trained local teams are responsive problem solvers obsessed with delivering on our 5 Star customer service promise every day.

We look forward to learning more about your vision, goals, and challenges to provide a deeper dive into your service needs and show you why we are the right partner for Laurel Thicket Property Owners Association Inc. We will offer you proactive and innovative solutions for your consideration, with an emphasis on open communication, attention to detail, and cost containment always.

We appreciate the board's careful consideration of this proposal and believe that Associa H.R.W. Management will provide the partnership and high level of service you envision for your association.

Sincerely,

Kayla Hintz
Business Development Manager
Associa H.R.W. Management
586.488.9549
kayla.hintz@associa.us



Our neighborhood switched to HRW after using several other property management companies. HRW has been much more communicative and has an excellent portal for our community.



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Local Experts. Proactive Management.

Associa H.R.W. Management offers the full spectrum of HOA, condo, and mixed-use property management services. Our local talented teams demonstrate our values and lead the industry in training and earning professional certifications and designations. With local expertise and strong leadership, we take pride in helping the associations we serve achieve their vision.



2007

Business Established



1

Local Office



270+

Local Communities Served

"With Associa, nothing falls between the cracks or is forgotten."





Services Overview

We are here to help your association be successful. Your goals for Laurel Thicket Property Owners Association Inc are our goals. Whether you are a self-managed association looking for additional support, or a master-planned community seeking full-service management, our experienced team can customize a plan that's right for you. The transition from your current management company to Associa H.R.W. Management requires great attention to detail. You will have our expert support every step of the way.



**Expert Community
Management**



**Secure Technology
Solutions**



**On-Demand
Professional
Maintenance**



**WATCH AN INTRO
TO ASSOCIA VIDEO**



Expert Community Management

We like to say that Associa H.R.W. Management helps make community happen. Why do we say this? Because creating a vibrant and engaged community doesn't just happen on its own. It happens when you pay attention to the small details and the big picture. We will advise, recommend, and support you on all the decisions and activities that can enhance and preserve the longevity of your community. The services below are just a sample of what we can do for your association.

TOP-TIER MANAGEMENT SERVICES

- Professional board consultation
- Local customer support team
- Contract negotiation and contractor supervision
- Complimentary board orientation and seminars
- Insurance management

BULLETPROOF FINANCIAL MANAGEMENT

- Comprehensive, real-time financial reporting
- Budget analysis and preparation
- Investment fund monitoring
- Accounts payable and accounts receivable services
- \$6 million fidelity bond, the industry's highest level of protection

PROACTIVE COLLECTIONS & ENFORCEMENT

- Governing documents enforcement
- Delinquency and violation notices
- Delinquent account management
- Third-party collection agency
- Call center, lien recordation, personal litigation, and foreclosure action

FAIR ELECTIONS & GOVERNANCE

- Preparation of board updates and meeting packages
- Board portals for access to financials, work orders, private messages, and violations
- Homeowner portals for access to meeting schedules, minutes, voting capabilities, and surveys
- Architectural and design review services
- And more!



Training & Education

At Associa, we invest in our employees in ways that matter to you. When it comes to employee education, training, and development, we are proud to lead the way in the HOA management industry. We are committed to serve our clients with well-trained, empowered, and motivated team members.

We equip our team members with the tools they need to strengthen their expertise and continue their education through our comprehensive learning program, Associa University. Associa University facilitates career advancement and professional skill elevation by offering a classroom experience, virtual instruction, and a customized platform with a specialized curriculum for every role. Through Associa University, we also provide:

- Support for industry certification and advanced designations
- On-demand online learning
- Collaborative learning groups
- Career path and ongoing development opportunities
- Webinars presented by our learning partners (DeVry University, University of Dallas)
- Special tuition discounts with our learning partners
- Skill assessment and leadership development

“

As a condo owner for 18 years and a board member for 10 years, I couldn't ask for a better management company.

”



Secure Technology

To maximize the security of sensitive information and assets, we have built our IT infrastructure based on the privacy and protection of funds, transparency, and efficiency. We utilize cutting edge software to meet these requirements.

TOWNSQ

Through our partnership with TownSq, we offer an innovative all-in-one app for managed communities.

- Online payment capabilities
- Real-time reporting
- Seamless communication tools
- Document storage
- Package management
- Custom community websites
- Architectural Requests
- Amenity reservation management
- And more!

COMMUNITY MANAGER DASHBOARD

Our Community Manager Dashboard enables managers to communicate across teams, deliver financials, and manage timely tasks and assignments from a single, remote-accessible dashboard.

C3: COMPLETE CONTROL FOR COMMUNITIES

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

- Financial management
- A/R and A/P
- Budgeting & Reporting

STRONGROOM

Strongroom is a best-in-class product that provides both unparalleled safety and convenient, enterprise-level verification measures and secure access to review and approve your invoices.

- Complete data protection
- Centralized invoice processing
- Automated invoice approval workflows

VENDOR ACCESS PORTAL

This portal gives trusted vendors a centralized, easy-to-use interface where they can verify documents such as tax and insurance forms, invoices, contracts, and process payments efficiently and securely.

COMMUNITY ARCHIVES

Community Archives provides no-hassle document retrieval. Our real estate document solution delivers critical property information to Realtors®, title companies, attorneys, mortgage lenders, and homeowners.



TownSq App

COMMUNITY LIVING HAS NEVER BEEN EASIER.

Designed as an all-in-one solution for managing communities, TownSq delivers the most complete, mobile experience by helping you connect, collaborate, and stay up to date on everything happening in your community. Improve and simplify your daily responsibilities while ensuring homeowner voices are heard with the TownSq app—FREE for our communities.

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
- Post community updates and announcements quickly
- Save time and reduce paperwork

COLLABORATE

- Submit work orders, service, and architecture requests with no hassle
- Reserve and manage common areas and amenities
- Manage committee special projects and assignments
- 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



www.townsq.io

AVAILABLE ON





On-Demand Professional Maintenance

Maintenance is vital to protecting and preserving real estate values in your community. It can also be daunting and time-consuming. Associa OnCall offers expert services for hassle-free maintenance to assure your peace of mind. Our teams are licensed, insured, bonded, and compliant with OSHA regulations. They can provide a broad range of services to ensure your community maintains property values and preserves the investments you make.

MAINTAINING YOUR COMMUNITY

- Care and oversight of common areas, landscaping, and repair services
- Community inspections and property condition monitoring
- Routine maintenance and unexpected repairs
- Capital projects
- Needs assessment and reserve fund analysis
- Preventative maintenance programs
- Project management and oversight
- Log, review, and dispatch service requests
- Upload violations to management software in real-time via our mobile app
- Submit work order requests anytime online or via our mobile app
- Vendor review and assessment
- And more...just ask us

“

As a board member, I feel empowered to make good decisions about my community; a significant part of that is the toolkit provided by our Associa team.

”



Associa OnCall

YOUR COMMUNITY MAINTENANCE SOLUTION

The upkeep of your community or home is essential not only for retaining property values, but also for security and peace of mind. With Associa OnCall, you can count on expert service from a trusted local vendor, and rest assured that all your maintenance issues can be resolved with a simple phone call. Our trained and certified technicians are available to your community on an hourly or contract basis to carry out a broad portfolio of association-related services, including:

AMENITIES

- Pool & playground maintenance and cleaning
- Fitness room sanitizing
- Common area & clubhouse disinfecting
- Walking trail upkeep

EXTERIOR

- Lighting
- Roofing
- Downspouts & building drainage management
- Siding, trim, & concrete repairs
- Sign installation and replacement
- Pressure washing
- Winterizing
- Painting

MISCELLANEOUS

- Dryer vent upkeep
- Gate repairs
- Electrical repairs
- Equipment tune-ups
- Plumbing
- Dog station installation
- Garbage container maintenance
- New development & one-time clean-ups
- Pest management

AssociaOnCall
Expert service from a trusted neighbor

When you require assistance with repairs, installation, or supervision Associa OnCall is here to help.

Transition Process

We have a dedicated transition team that works with your manager, current company, and association to ensure a professional, seamless transition. This process involves reviewing financials, governing documents and CC&Rs, and past meeting minutes and policies. It also involves vendor contracts and scopes of services while collecting all homeowners' fees and balances, holding vendor walks, and board orientation or meet-and-greet.

PHASE 1

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
- Identify most recent tax return and franchise return
- Present collection policy to the board for approval
- Set up resale/transfer and refinance process
- Review delinquent accounts
- Review all existing collection letters and setup new 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 restated CC&Rs
- Document residential guidelines
- Gather resolutions, meeting minutes, pertinent reports
- Obtain insurance certificates from insurance agents and present Best Practice policies to board
- Establish new SOPs
- Review reserve study
- Meet vendors and determine status (*if applicable*)
- Design welcome package

COMPLIANCE

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

COMMUNICATION

- Meet with board for a transition session
- Review website or create new site
- Contact all association members
- Notify contractors, insurance, city/county and vendors
- Schedule initial meet and greet between board & the management team

TRAINING

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

PHASE 2

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

- Community Management team performs initial inspections with all stakeholders
- Review all pending covenant violations

COMMUNICATION

- Conduct initial meet and greet between board & the management team
- Schedule initial meet and greet between the association and the management team (*optional*)

TRAINING

- Continue training procedures for community manager
- Complete all software training with board and other users
- Adjust processes and procedures as needed

PHASE 3

BOARD EVALUATION

- Executive staff and board to evaluate community manager

COMMUNICATION

- Board invite to TownSq
- Homeowner welcome and invite to TownSq

Your Investment

Thank you for the opportunity to present how we can work with your community to achieve its vision. If you have any questions about the contents of this proposal, please reach out to kayla.hintz@associa.us. We look forward to the possibility of becoming your community management partner and helping your community thrive.

AT A GLANCE PROPOSAL INCLUDES:

FINANCIAL

- Preparation of annual budget
- Maintenance and reconciliation of bank accounts
- Preparation and distribution of financial reports
- Collection of assessments
- Set up of account payment systems
- Delinquency collection reports
- Tax and audit facilitation
- Provide accounts payable and financial accounting services

COMMUNICATION

- Full customer service department for residents (phone calls, emails)
- After hours call center for emergencies
- With TownSq, residents can manage their accounts, pay online, get up-to-date community news and events, request and review status of service inquiries, any time from any device.

We are pleased to guarantee the management fees quoted below for the next ninety days, providing you the necessary time to evaluate the value and services included in this proposal.

YOUR MANAGEMENT FEE INCLUDES:

- Annual Meeting/Board Meeting Preparation, Mailings/Notices, Attendance, and Follow Up to include minute preparation
- Annual Draft Budget Preparation
- Annual insurance review; obtain quotes at board's request
- File Annual Corporate Report with the State
- Prepare and send out assessment invoices to owners
- Collect and deposit assessments
- Collect, process, and pay invoices for association bills
- Prepare monthly financials statements
- Prepare yearly information and provide to CPA for tax preparation and end of year financial report
- Process all incoming mail for association
- Send out late letters to delinquent owners
- Work with attorney for legal action on unpaid assessments (at board's direction)
- Process estoppel requests for resales

\$500.00 Per Month, plus applicable ancillary costs.

One time \$350.00 on boarding fee applies

OPTIONAL OFFER- FULL SERVICE MANAGEMENT

Would include Four (4) Meetings and Monthly (12) Inspections

\$1,506.00 Per Month, plus applicable ancillary costs.

Exhibit A

Fees effective 1/1/2024

Itemized Charges for Periodic Routine Services

Item	Charge
<i>Reoccurring:</i>	
Records Storage	\$5.00 per box per month
Electronic Data Storage	\$19.99 per month
Annual Office Supply	\$8.99 per month
Annual Account Maintenance (monthly)	\$1.20 per unit per month
Statements (quarterly, semi-annual & annual)	\$3.00 per statement
E-Statements	\$1.50 per statement
AP payments (checks or electronic)	\$1.50 each
Materials Reproduction (copies/scanning)	\$0.25 – black/white; \$1.00 – color; \$0.25 - scans
Envelopes	\$0.25 each - #9/#10; \$0.99 each - Large
Folding	\$0.25 each
Labels	\$0.15 each
First Class Postage	Cost + .05
Project Administration (projects that exceed \$2,000)	1% of total project
Annual IRS 1099 Processing	\$15.00 each
<i>Architectural Request Processing:</i>	
ARC Processing through email, hard copy, etc.	\$25.00 each
ARC Processing with non-Associa electronic system	\$15.00 each
ARC Processing with TownSq ARC	\$40.00 per month + \$10.00 per application
<i>Optional:</i>	
Emergency Checks/Credit Card Usage	\$35.00 per check/usage
Extra bank accounts (1 Operating & 1 Reserve included)	\$15.00 per bank account
Notary Services	\$5.00 per document
Pool, Parking, or Recreation Passes	\$5.00 each
Reservation Processing/DMV Research	\$5.00 each
Website	\$50.00 per month
Website – Basic Setup	Market Price
TownSq Electronic Voting	\$425.00 per voting event
Annual Meeting Virtual Platform (GoTo Webinar)	\$95.00 per event (GoTo Meeting – free)
<i>Pass through costs billed to homeowner as applicable:</i>	
Replacement Coupon Booklets	\$10.99 per booklet (12) with envelopes included
After Hours Non-Emergency Service Call	\$25.00 each
Violation Hearing Notice	\$10.00 each
Delinquency 15-Day Demand Letter	\$80.00 each
Returned Checks	\$30.00 each
Payment Plans – setting-up and monitoring	\$30.00 each
Bankruptcy accounts – setting-up & monitoring	\$45.00 each
Late Fee Notice	\$2.00 each

Hourly rate for management services outside the scope of the contract:	
Senior staff: \$150.00 per hour	
Community Manager: \$90.00 per hour	
Clerical staff: \$50.00 per hour	
Meetings lasting more than two hours or meetings that run past 9:00 pm are billed at above rates in 15-minute increments. Unless otherwise agreed in advance, evening meetings will be conducted Monday through Thursday and meetings that occur on weekends will be billed at double the standard hourly rate.	
Agent's employee taking meeting minutes	\$90.00 per meeting
Extra Site Inspections and Data Entry	\$50.00 per hour plus portal-to-portal mileage

Legacy Account Closing, Post Closing, New Account Setup, Resale and Disclosure Certificates	
Resale information processing (optional purchase at closing for resales), Exterior Inspections	Processed through Community Archives. Paid at closing by parties to the transaction.
Legacy Account Closure Fee & Post-closing Fee (developer-new unit sale)	\$50.00
New Account Setup Fee	\$100.00 (Resale), \$25.00 (New home & Sub)

Applicable only if the Association has paid or dedicated staff that are employed by the Association:

Payroll & Benefits Administration	
<p><u>Association Employees</u> (Those employed directly by the Association) Payroll & Benefits Administration (Including 941 tax filings, regulatory filings & W-2's)</p> <p><u>On-Site Personnel</u> Payroll & Benefits Administration. Payroll pass-through (Including 941 tax filings, regulatory filings & W-2's)</p>	<p>In the event the Association has employees, an amount equal to 5% of any employee related expenses shall be paid to the Manager as a professional fee for record keeping and for the preparation and filing of payroll forms and taxes.</p> <p>Costs associated with on-site staff that are in the employ of Manager will be charged to the association at an hourly billing rate that includes employee related expenses and administrative costs plus 10%.</p>

Additional services are provided as may become available at the prevailing rate or as mandated by law. All fees listed on this Exhibit A are subject to reasonable change, from time to time, without prior notice.

Exhibit B

Advanced Technology Group
Associa Abstract Services, Inc.
Associa Advantage, Inc.
Associa Client Shared Services Center, Inc.
Associa Community Association Websites, Inc.
Associa Community Watch
Associa Developer Services, Inc.
Associa OnCall
Associa Supports Kids
Association Times, Inc.
Associations Insurance Agency, Inc.
Avid Xchange, Inc.
Community Archives, Inc.
First Associations Bank
First National Bank of Kemp
HOA Collection Services, Inc.
Lincoln Hancock Restoration, LLC
Mutual of Omaha Bank
Pacific Premier Bank
PayLease
Platinum Title Services, LLC
Union Bank

*Other entities as periodically may be disclosed through amendment of the Agreement or as published on Agent's website.



The Associa Difference

We are committed to making a real difference for our clients. When you partner with us, your community association and homeowners get access to unmatched programs and services. In short, we put the power of our national resources to work for YOU.

ASSOCIA ADVANTAGE

- A national program offering deep discounts from trusted vendors like The Home Depot and Orkin – saving you time and money.
- A waste hauling and recycling service that leverages a collective buying power pool to ensure your community has the best rates for these services.
- An energy saving program that provides significant electricity savings to Associa managed communities.
- National painting and roofing partnerships that enable you to receive the highest-quality work and craftsmanship at an affordable price.
- Learn more at associaadvantage.com.
- A commitment to support living in healthy and sustainable ways. Learn more at associagreen.com.

ADDITIONAL BENEFITS

- A restoration service that has helped hundreds of communities rebuild after disasters like floods, fires, and hurricanes. Learn more at lhrpros.com.
- A one-stop source for exceptional, affordable insurance for community associations. Learn more at associationsinsuranceagency.com.

ASSOCIA CARES

- A culture driven by our values to make an impact for families in the communities where we live, work and play. Learn more at associacares.org and associasupportskids.org.



We have the most advanced services, technology, and products to help achieve your vision and serve your community. I invite you to discover how Associa is making a difference in communities across North America and how we can do the same for yours.

– John Carona, Founder & CEO





Associa Cares

ASSISTING FAMILIES & COMMUNITIES IN CRISIS

Associa Cares is a 501(c)(3) nonprofit organization created to assist families and communities in crisis as a result of natural and man-made disasters. Funded entirely by tax-deductible donations of Associa employees and concerned citizens across North America, we administer resources to where they are most needed.

We help people get back on their feet and recover as quickly as possible by:

- Responding to both Associa-managed and non-Associa communities in need
- Motivating our employees and clients to join us in making a difference
- Raising funds and safeguarding financial resources to fulfill our mission

And it is all done with time donated by Associa employees.



\$127,900

in U.S. & Canada COVID-19 relief
community grants to
local nonprofits



\$327,000

distributed in global assistance



\$4,000,000+

distributed to over 3,000
families since 2017

ASSOCIA  CARES®

214.272.4141 | 800.808.4882 | info@associacares.com | www.associacares.com

Associa Advantage

EXCEPTIONAL VALUE. EXCEPTIONAL LIVING. SIGNIFICANT SAVINGS START HERE!

Associa Advantage puts purchasing power in your hands. We create partnerships with well-known brands and negotiate discounted prices based on our substantial buying power. Then we make these savings opportunities available to your association, saving you time and money. All national and local vendors are pre-screened and vetted, so you know you will get expert service from people you can trust. And best of all, this is available to Associa-managed communities at no extra cost.

PARTNER CATEGORIES

- Elevator service
- Fitness equipment
- Janitorial supplies
- Landscaping
- Maintenance supplies
- Paint supplies & services
- Pest control
- Pet waste supplies & services
- Plumbing
- Security
- And more!

FEATURED PARTNERS



SHERWIN-WILLIAMS



Staples

1-800-GOT-JUNK?





Lifestyle Services

Coming together and connecting with friends, family and neighbors is more valued than ever before. To enrich the quality of life and enhance the vibrancy of your community, we offer a wide variety of lifestyle services that build a sense of belonging, give residents a chance to meet neighbors, and of course, have fun.

Our dedicated lifestyle directors are experienced in designing programs for every type of community and can create a schedule of ongoing and one-time events to boost revenue and involvement. They are supported with extensive resources to relieve you of the work and stress that comes with planning and hosting your own events.

WE ARE HAPPY TO COORDINATE AND MANAGE EVENTS LIKE:

- Movie nights
- Wine tastings
- Golf and tennis tournaments
- Summer barbecues and cookouts
- Holiday parties
- Building grand openings
- Learning opportunities for all ages
- Community-building events through Associa Cares, Associa Supports Kids, Associa Green, and National Night Out



Enriching the Place You Call Home

We believe in setting high standards and are obsessed with delivering world-class customer service to your community. At Associa H.R.W. Management, building strong and enduring partnerships with our clients is at the center of everything we do.

To bring positive impact and meaningful value to every community.

Kayla Hintz

kayla.hintz@associa.us | 586.488.9549

