

ASSOCIATION MANAGEMENT

Sample Scope of Services

2200 W. Hamilton St.
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Association Management services shall include the following:

I. ADMINISTRATIVE MANAGEMENT:

- A. The provision of a Property Administrator as a direct employee of the Management Company who will administrate the business affairs of the Association under the guidance of the Management Company.
- B. Maintenance of Association records as determined by the Executive Board and to include the following as may be provided and/or required:
 1. Unit Owner Roster:
 - (a) Lists of all Resident Owners (RO),
 - (b) Non-Resident Owners (NRO), and
 - (c) Resident Tenants (RT).
 2. Complete correspondence files.
 3. Financial records, to include:
 - (a) Bank Statements
 - (b) Investment Records
 - (c) Records of Reserve Funds
 - (d) Income/Expense Statements
 - (e) General Ledger Reports
 - (f) Budget Reports and Analysis
 - (g) Reports of Annual Audits
 4. List of all Sub-Contractors authorized to provide services to the Association including a Certificate of Insurance from each required before any payment is tendered.
 5. Records of all maintenance and work orders.
 6. Insurance files to include the original of the current master insurance policy.
 7. Minutes Book, which will include a copy of the minutes of each official meeting of both the Executive Board and the Annual Meetings of the Association.
 8. Book of Resolutions, which records formal policies and/or rules and regulations adopted by the Executive Board of the Association. Resolutions will be prepared either by Management or the Association Attorney.
 9. Association Documents including the following:
 - (a) Declaration of the Association
 - (b) Bylaws
 - (c) Articles of Incorporation (if available)
 - (d) Residents Handbook of Rules, Regulations and General Information (as originally codified/drafted by Management and approved by the Executive Board)

- C. Attend the regularly scheduled Executive Board meetings and open Association meetings (and serve as Parliamentarian if desired), prepare Agendas and record Minutes of all Meetings for approval and distribution as determined by the Executive Board.
- D. Render guidance and assistance to the Executive Board and to any committees in the fulfillment of their fiduciary and administrative responsibilities to the Association.
- E. Update the Resident's Handbook of Rules, Regulations and General Information as may be required from time to time for distribution to new Unit Owners and Tenants.
- F. Periodically review, bid and coordinate all insurance requirements of the Association.
- G. Process and provide administrative support to any and all insurance claims.
- H. Investigate and administrate all non-compliance requests or complaints. Work closely with the Executive Board of in the enforcement of the rules, regulations, and the provisions of the Association Documents in accordance with the Enforcement Procedure established by the Board.
- I. Coordinate all approved maintenance requests in accordance with the provisions of the rules and regulations, the Association Documents and directives of the Board.
- J. Implement and/or update a proper resale disclosure procedure in accordance with PUCA requirements.
- K. Scrutinize, recommend to the Board, and implement such procedures as become necessary due to local municipal requirements and changes in PUCA.
- L. Draft and distribute to all Unit Owners and Residents a periodic "Notes from Management" newsletter containing important facts, updates, correspondence and communication from the Association.
- M. Maintenance of an Association Website in the form of a secure "Community Portal" on Management's website to contain the following information as may be determined by the Executive Board:
 - 1. Copies of Association Documents:
 - (a) Declaration
 - (b) Bylaws
 - (c) Resident's Handbook of Rules, Regulations and General Information
 - 2. Community Forms
 - (a) Resale Certification Request Form
 - (b) Modification Request Form
 - (c) Maintenance Request Form
 - (d) Unit Owner Complaint Form
 - (e) Unit Owner Comment Form
 - (f) Unit Owner Survey Form
 - 3. Copies of Minutes of Meetings
 - 4. Copies of Financial Statements
 - 5. Copies of Notes from Management

Note: Different levels of access can be established by the Executive Board.

II. FINANCIAL MANAGEMENT:

- A. Collection of all income, assessments and fees as follows:
 - 1. Order coupon payment books and distribute to all Unit Owners.
 - 2. Collect dues in a manner acceptable to the Executive Board.
 - 3. Post homeowner dues to proper accounts.
 - 4. Deposit homeowner dues in the Association account.
 - 5. Prepare monthly delinquency report.

6. Prepare and mail delinquency letters to homeowners, in accordance with Association policy.
 7. File with the local Magistrate and/or file liens on delinquent accounts in accordance with Association policy.
- B. Disbursements of Association funds:
 1. Review and approve monthly invoices for budgeted services provided to the Association.
 2. Issue checks for all approved invoices on a routine basis.
 - C. Negotiate service and maintenance contracts.
 - D. Maximize cost savings through volume purchase power, lower priced "in-house" personnel, and affiliated subcontractors.
 - E. Maintenance of numerous wholesale accounts throughout the area with material discounts of up to 50%, passed directly through to the property.
 - F. Thoroughly review, approve, and pay all property operating expenses.
 - G. Preparation of user-friendly, easily understood, detailed monthly financial statements on a cash basis as follows:
 1. Balance Sheet
 2. Income and Expense Statement reflecting Annual Budget, month-by-month activity, year-to-date totals and balance of annual budget.
 3. Detailed General Ledger of all expenses of the Association
 4. Detailed Accounts Receivable Statement
 5. Any other statements and/or reports that may be requested by the Executive Board.
 - H. Prepare annual budget for review and approval by the Executive Board. Include budgeted reserve and long range capital planning.
 - I. Coordinate and supply all information as required for the annual audit.

III. FACILITY MANAGEMENT:

- A. Perform and coordinate periodic site visitations as may be required for specific issues required to be addressed and/or supervised by Management.
- B. Assist in the preservation and maintenance of a neat and clean appearance throughout the development.
- C. Coordinate all maintenance requirements of the property including but not limited to grounds keeping, snow removal, facility maintenance, reserve replacement, deferred maintenance, 24-hour emergency maintenance, capital improvements, etc.
- D. Assist in the preparation of the performance specifications for all sub-contracted services and solicitation of sub-contractors' bids.
- E. Perform comprehensive bid analysis for recommendation to and discussion with the Executive Board.
- F. Prepare comprehensive contracts for execution by sub-contractors in the performance of ongoing maintenance services.
- G. Supervise the performance of Sub-Contractors as may be required.
- H. Provide general contractor services in more extensive renovation work utilizing both in-house personnel as well as outside contractors who work for the firm on a reduced cost basis.
- I. Provision of Unit Owner or Resident maintenance and billing.