

SHARPER IMAGE MANAGEMENT

Bid Specification Sheet

	FULL SERVICE ACTIVITY MENU	Included	Incl. At Add Cost	Not Included
	Postage, printing, bank fees, other direct costs not included			
	FISCAL			
	Assessment/Collection (Annual & Special)			
	Create and mail assessment invoices	X		
	Receive, log and deposit funds	X		
	Delinquency follow-up	X		
	Create and send late notices	X		
	Apply late fees & interest charges	X		
	Send delinquency & suspension letters	X		
	Send "file lien/collection" requests to Association's Attorneys	X		
	Court appearances		X	
	Vendor Invoices			
	Receive and review for appropriateness	X		
	Produce and mail timely check payments	X		
	Keep records file of all invoices/statements/receipts	X		
	Accounting			
	Establish Budget & Chart of Accounts for Association (With Board, Committees)	X		
	Log all revenue/expense transactions by accounting in computerized accounting system & report monthly	X		
	Produce monthly financial reports, including:	X		
	Income Statement (Budget vs. Actual YTD)	X		
	Balance Sheet	X		
	Reserve Fund Evaluation			X
	Tax return preparation through outside Accountant		X	
	Reconcile bank statements monthly	X		
	Budget Preparation			
	Develop Skeleton Budget based on previous year	X		
	Produce working budget documents for board, and committee use	X		
	Produce consolidated budget for board review and approval	X		
	Provide budget increase/decrease recommendations	X		
	Reserve Analysis			
	Review existing reserve program through outside Reserve Specialist		X	
	Review common area assets and facilities & provide annual recommendations for reserve funding			X
	Assist Engineering firm or Reserve Specialist to conduct periodic reserve study	X		
	Management Company Expenditures			
	Provide monthly summary of all Management company expenditures	X		
	Provide detailed monthly invoice for services	X		

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	ADMINISTRATION			
	Board of Directors Meeting			
	Coordinate meeting dates and notify Board members (Mon-Thurs)	X		
	Develop agenda from board/officer input	X		
	Board meetings Monday-Thursday as set forth in Bid/Contract	X		
	Type minutes taken by Board Member		X	
	Annual Meeting			
	Attendance (Mon-Thurs) as set for in Bid/Contact	X		
	Meeting Coordination:	X		
	Mail notification to all applicable lot owners	X		
	Assist Board to obtain and reserve facility for meeting	X		
	Create ballots and proxy's & track	X		
	Absentee vote certification/compilation	X		
	Assist with sign-in & quorum determination	X		
	Assist with vote collection, counting and certification	X		
	Produce copies of all documents & handouts to be distributed at meeting	X		
	Type minutes taken by Board Member		X	
	Presentation of Management Company Report	X		
	Owner Database			
	Establish owner database for Association (transfer from existing files)	X		
	Maintain and update (adds/deletes/changes)	X		
	Produce annual Homeowner address list and associated documents	X		
	Distribute mail only	X		
	Provide database (online if available) access to Association's Officers	X		
	Produce quarterly Directory updates (adds/deletes) for distribution w/Newsletter	X		
	Newsletter			
	Copy for Association provided 'original'	X		
	Distribute to all resident homeowners by mail only	X		
	Mail copies to remote lot owners	X		
	Provide articles related to property management issues as the manager deems appropriate	X		
	Re-sales			
	Track homes sold by information provided to us from Closing Attorneys, Board and Realtors, etc.	X		
	Inform Welcome Committee of new move-ins, upon request	X		
	Provide copy of covenants, bylaws & ACC standards to Welcome Committee for new residents	X		
	Produce association questionnaires/certifications and closing letters (fee paid to mgt by homeowner for closing letters)		X	
	Update owner database	X		
	Develop new resident information package			X
	Board & Officer Training			
	Training for new officer/board members	X		
	Member transition coordination	X		

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	Transition from Developer to Homeowner Control			
	Assist with transition process	X		
	Association Documents			
	Mandatory for Association to provide Management Company an electronic file of all governing legal documents		X	
	OPERATIONS & MAINTENANCE			
	Architecture Control & Covenant Violation Enforcement			
	Send violation letters at direction of Board and or by Board	X		
	Property Manager rule/covenant inspection as set forth in Bid/Contract	X		
	Coordinate appeals	X		
	Legal follow-up as needed	X		
	Maintain correspondence file	X		
	Properties Management			
	Direct/monitor performance of contracted services including but not limited to: Tennis/Swim Center, Security, Street Sweeping, Landscape Maintenance, Insurance and Pool Service	X		
	Inspect grounds as set forth in Bid/Contract and advise Board of problems or maintenance needs	X		
	Coordinate repairs	X		
	Point of contact for problem notification	X		
	Tag & Inventory Association property		X	
	Periodic Security review and assessment			X
	Emergency maintenance services - as requested	X		
	Clubhouse activity reservation schedule		X	
	Keep a property information booklet	X		
	Lock and unlock pool and clubhouse daily			X
	Services Procurement			
	Coordinate competitive bids for pool, grounds, maintenance tennis center, insurance & other services as needed	X		
	Contract development specifications assistance	X		
	Bid evaluation & award assistance			
	Extra Benefits			
	Extensive Landscape knowledge	X		
	Bachelors Degree in Architectural Design/design experience	X		