

Management Company Request for Proposal

Introduction

Fawn Ridge Maintenance Association is seeking responses from qualified management companies to assume the management responsibilities for the community of 682 homes. The Fawn Ridge HOA is a very active Association with an energetic board of directors and architectural committee who take a hands-on approach to running the community. We are seeking a professional and flexible management company able to work with the Association team in maintaining the community and managing finances and violation processes as per our HOA policies. The Association is currently managed by NewGuage and the board is seeking information on other companies and other company offerings to see what would be the best fit for this community.

Instructions

Please fill out all attached forms and add additional information where necessary. Additional brochures or proposals are welcome, however any information in electronic format is preferred.

Due Date:

The Association will require all submissions to be sent to the Board of Directors at BoardofDirectors@fawnridge.org or to be submitted by mail to Fawn Ridge HOA , 8945 Eastman Dr,, Tampa, FL, 33626 no later than ___13 april_____, 2022.

Decision Date:

The Association will be reviewing all responses and then looking to discuss in the following board meeting to be conducted at or around ___April_____, 2022. The Board would expect to make a decision around this time.

Vendor Information

Company Name: Click here to enter text. **Wise Property Management**

Address: Click here to enter text. **18550 N. Dale Mabry Highway, Lutz, FL 33548**

Contact: Click here to enter text. Telephone: Click here to enter text.

Email: Click here to enter text.

Ky Martin
Vice President of Operations
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(813)-968-5665 x318

Douglas Lee
Vice President of Operations
DLee@wisepm.com
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1.0 Company Background		
1.1	Number of years in business	Click here to enter text. Years
1.2	Number of Employees & Local Employees	Employees EmplLocal Local.
1.3	List 3 other local communities being managed	Click here to enter text. Tampa Racquet Club Rivercrest HOA South Pointe HOA Dolce Vita HOA
1.4	Company Website	Click here to enter text.
1.5		www.wisepm.com

41 years
32. All local

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2.0 Violation Processing		
2.1	Does Company provide a deed restrictions violation review service of community properties?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
2.2	What is the frequency of Review?	visits. / month two inspections
2.3	Are Pictures taken during the review process with time & date stamps?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Sometimes
2.4	How are violations tracked?	<input checked="" type="checkbox"/> On Website <input checked="" type="checkbox"/> Internal Database <input type="checkbox"/> Spreadsheet <input type="checkbox"/> Other (Please explain) Click here to enter text.
2.5	How are violations reported to the Association?	Click here to enter text. mail and email
2.6	Does the company maintain a violation history by property?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
2.7	Does the company allow association to customize violation letter content?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
2.8	What is the cost to the association for each violation notice?	\$cost/Letter \$1.25
2.9	How are Attorney Escalations tracked? Do they have a unique case number? How is status maintained and updated to the association?	Click here to enter text. Monthly legal status reports provided to Board submitted by legal counsel
2.10	Does property manager patrol neighborhood in marked or unmarked vehicle?	<input type="checkbox"/> Marked <input checked="" type="checkbox"/> Unmarked
2.11	Association has a violation policy with respect to type of violation and timeframes for response and escalation. Does the Company allow for flexibility in processing of Violations?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Need to Review

Provide details on any other Violation services offered:

Click here to enter text:

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3.0 Resident Services		
3.1	Does the company provide a 7/24 hotline for residents?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
3.2		
3.3	Is there a dedicated property manager assigned? (single point of contact for the HOA)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
3.4	What percentage of units would Fawn Ridge account for in their portfolio?	<u>20</u> %
3.5	Does Company Provide a community website page for residents?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	If Yes; Does this provide secure login for residents to view their account information?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
3.6	Does the Company Provide a Secured Website for Board & Community business	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
3.7	Can documents / information be posted to websites by Association?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
3.8	Does the company provide community meeting facilities? If Yes; How many people can they accommodate?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <u>30 - 20 - 12</u> (three sites)
3.9	Access to Information: Fawn Ridge has an Access to Information Policy. Where are community documents stored?	<input type="checkbox"/> Local Office <input checked="" type="checkbox"/> Electronically <input checked="" type="checkbox"/> Third Party Storage <input type="checkbox"/> Other (Please explain)
3.10	Is there a charge or restrictions for residents to view public access documents? Please specify	Click here to enter text. No

Please List any other services provided to residents:

Click here to enter text. **Please see Management Proposal**

Please List any other services provided to Board / Committees

Click here to enter text. **Please see Management Proposal**

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4.0 Architectural Applications		
4.1	How are architectural applications submitted by residents?	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> Mail <input checked="" type="checkbox"/> Web
4.2	What is the cost / submission to the Association	Cost. / Submission No Charge
4.3	How do residents submit payment for Architectural Applications?	<input type="checkbox"/> Check <input type="checkbox"/> Credit Card <input type="checkbox"/> PayPal or Other
4.4	Is there a service fee for electronic payment and if so how much?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> Third Party Fees No Charge for ACH
4.5	Is the architectural application customizable by association?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
4.6	How are applications conveyed to the Architectural committee?	Click here to enter text. via email and/or online web portal
4.7	What is the turnaround time to provide applications to the Architectural Committee once received by property management?	Click here to enter text. Days 24-48 hours
4.8	Fawn Ridge HOA has a color booklet for approved colors. Will the management company provide access to this booklet to residents? List access times and any restrictions such as call ahead that are required.	Click here to enter text. Yes

Please List any other architectural services provided to residents or board:

Click here to enter text.

Please see Management Proposal

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5.0 Financial Handling		
5.1	Is there a specific financial institution that is used by the Management Company or is the Association free to use its own financial institution?	Click here to enter text. Bank OZK, Truist, or Popular
5.2	How can residents submit payments for association fees? (Check all that apply)	<input checked="" type="checkbox"/> Mail <input checked="" type="checkbox"/> Web <input checked="" type="checkbox"/> Drop Off Payment Type <input checked="" type="checkbox"/> Check <input checked="" type="checkbox"/> Credit Card <input checked="" type="checkbox"/> PayPal or Other
5.3	Is there a service fee for electronic payment and if so how much?	<input type="checkbox"/> Yes \$ \$ \$ No for ACH
5.4	What is the payment process for contracted vendors and recurring payments? Does the management company pay all invoices or is the treasurer required to authorize monthly payments?	Click here to enter text. Online AP processing via board approval. Option for recurring payments on autopay.
5.5	What is the payment process for other non-recurring payments & Invoices? How are payments authorized?	Click here to enter text. Same as above.
5.6	How are financial statements provided to the HOA?	<input checked="" type="checkbox"/> Monthly <input checked="" type="checkbox"/> Online <input type="checkbox"/> Other Please Explain Click here to enter text.
5.7	Fawn Ridge HOA has a specific collection policy for assessments. Is the management company able to incorporate this policy?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Additional information regarding financials

Click here to enter text.

6.0 Management Costs		
6.1	Please provide Standard Annual Costs	\$Click here to enter text.
6.2	Please Lists all ancillary Management Costs	Click here to enter text. Please see Management Proposal and Schedule A

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6.3	Pleases List Fees & Consumable Costs Photocopies General Membership Notifications Violation Letters Pre-Lien Notice FAX Cost / Page Other	Please see Management Proposal and schedule A
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We certify the information provided in this proposal to be true and accurate.

Signature: Ky Martin

Name: Ky Martin - vice President of Management Operations

Date: 4/12/2022