**Management Screening Checklist**

Date:

Company:

Contact:

Title:

Address: Zip:

City: Fax:

Phone:

E-mail:

Web site:

* **Meetings**: Attends board meetings per year plus one annual homeowner meeting included in the basic management fee. Additional meetings carry a charge of $
* **Meeting Notices:** Will prepare and distribute meeting notices and agendas as directed by the board president. Will also assist with procedure at these meetings.
* **Property Visits:** Performs general grounds and buildings inspection and follows up on any needed maintenance or problems at least:

**checkbox** Weekly**checkbox** Monthly   **checkbox** Quarterly

* **Maintenance Scheduling:** Orders maintenance on the buildings and grounds according to standard practice or as directed by the board president and follows up to ensure completion. Prepare schedules of regular and extraordinary maintenance and repairs.
* **Maintenance Services**:
* Provides handyman maintenance services at $ /hour during business hours, $ /hour after hours, $ /hour on holidays.
* Performs larger renovation projects like painting, siding and deck repair, etc. on

checkbox Bid/proposal Basis  **checkbox** Time and Material Basis.

* **Major Repair Projects:** Assists in the specifications, bid proposals and project oversight of major repairs. Included in the basic management fee or for an extra charge of: $ , to be determined by board and managing agent .
* **Emergency Response:** Maintains a 24-hour emergency response service to protect the property and safety of the residents.
* **Purchases:** Negotiates contracts for services, tools, equipment, materials, and supplies for the operation and maintenance of the association's property.
* **Employees:** Assists in the selection, training, and supervision of any association staff hired to operate and maintain the property.
* **Insurance Claims**: Processes association insurance claims for
* No extra charge
* For an extra fee that will be included with the claim
* **Relations with Owners:** Responds to owner information, maintenance or service requests and records action taken.
* **Financial Responsibility:** Provides bookkeeping services:
* Collects, records, and deposits assessments to the association’s bank account in a timely manner.
* Pays association bills as authorized by the board in a timely fashion.
* Prepares monthly income & expense statements, balance sheets, and delinquency reports in a format usable by the board and auditors. Arranges for audit as directed by board.
* Maintains association bank accounts and provides monthly financial statements.
* Sends delinquency notices, levies fines, processes liens, and initiates legal action against delinquent owners in accordance with the association collection policy.
* **Sale Documentation:** Provides sale disclosure information as requested by seller for a cost of $ (to be paid by seller) .
* **Directory:** Maintains current directory of owners/residents, addresses, and phone numbers.
* **Files & Records:** Maintains current financial, maintenance, and administrative in an orderly fashion so that it is readily accessible by authorized association representatives**.**
* **Insurance:** Arranges insurance as indicated by the governing documents or as directed by the board.
* **Operating Budget:** Prepares the draft annual operating budget for board review.

**Reserve Study:** Assists the board or a reserve analyst in the review and update of the association reserve study. **(Can also perform actual reserve study.)**

**Other:**

**Other:**

**Other:**

**Monthly Management Fee $**

**Overall Impression:     checkbox**Excellent      **checkbox**Average      **checkbox**Poor

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