



MANAGEMENT SERVICES PROPOSAL

BEL PRE RECREATIONAL ASSOCIATION INC.



WE MANAGE TO MAKE A DIFFERENCE!

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"We respect the volunteerism, dedication and commitment of time and talent of Board Members to serve the community's needs. Our mission is to facilitate a positive direction on behalf of the Board of Directors."

*Charlene Pindell
VP of Community Management*

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ACM PROPOSED SOLUTION FOR YOUR COMMUNITY'S NEEDS

Dear Board of Directors,

Thank you for your interest in obtaining services of American Community Management (ACM). In addition to this proposal packet, you are also able to obtain information about ACM through our website at www.acmhome.com. At your convenience, we would be happy to schedule a meeting with the Board of Directors to review any questions you may have about ACM.

At American Community Management, we seek to attract and retain high-quality personnel to provide the best customer service experience to our communities. ACM prides itself on implementing the latest and most advanced technology to deliver information as efficiently as possible and to streamline communication between the Board, ACM and unit owners. We have implemented an advanced level of software that makes more information available online to our client Boards and unit owners. We also have a strong commitment to continually investing in educational opportunities for our employees, so they can perform community management services at the highest level.

We look forward to the opportunity to work in partnership with your community and appreciate your time and consideration. If you have any questions or wish to schedule a meeting, please contact Ron Rims at (410) 997-7767 ext. 376 or via email at rrims@communitymanagers.net. Thank you.

Sincerely,



M. L. Herzberger, Jr., Chairman, and Founder

American Community Management, Inc. (ACM)

THE ACM ADVANTAGE

ACM has had the privilege of working with communities since 2001. In that time, we feel that our distinguished staff have established an excellent track record of professional management services and responsiveness to Board's concerns. Our team focuses on providing communities with effective communication through our Administrative staff; easy to understand financial statements & operating reporting through our Accounting department; and professional management services from experienced and dedicated Managers. Our success is built on the pillars of Communication, Integrity, Professionalism & Transparency in Business and Governance.

In the section below, we have highlighted some of our customized services provided for your community that exemplifies the ACM advantage:

MEETING THE DYNAMIC NEEDS OF YOUR COMMUNITY THE ACM WAY!

- ACM's longevity and stability in the marketplace with a proven track record is evident in having built a portfolio with more than **200 community associations and approximately 26,000 homes**.
- ACM offers strong, long-held relationships with quality service providers which translates to competitive pricing and other discounts due to ACM's buying power as a benefit to ACM-managed communities.
- ACM has successfully transitioned dozens of properties in 60 days or less.
- ACM has established an extensive portfolio throughout **Maryland** with regional managers dedicated to its various jurisdictions and unique needs. In addition to this, our overall management portfolio has a strong history of managing homeowner associations, master associations, commercial properties, and condominiums.
- ACM offers dedicated **support teams** strategically positioned to service the needs of community associations to include maintenance and facility management, accounting analyst and reporting group as a board resource, a full-service administrative department to support producing letters and other correspondence, receiving architectural requests, and maintaining community information on the website.
- Our **Integrated Web Services Platform** and communications tools allow ACM to create and maintain a functional portal for your community association. Our cloud-based service allows ACM staff, Board members and homeowners anytime/anywhere access to vital community information.
- Our customer service/ call center offers dedicated professionals trained to quickly respond to a variety of homeowner needs.

ACM PROPOSED SOLUTION FOR YOUR COMMUNITY'S NEEDS

- ACM offers **sustainable cost-effective and eco-friendly solutions** by way of researching and providing information on the most competitive energy usage rates being offered in your area. We will provide assistance in organizing data, selecting vendors and implementing smart energy programs such as solar power, LED lighting options, recycling programs, organic fertilization options, etc.
- Our **in-house Accounting Department** is led by a Certified Public Accountant (CPA) partnered with a Director of Accounting with decades of experience in the hospitality and property management industry. With the support of our expert Accounting Analyst, we provide unparalleled financial management solutions customized to the needs of a community. We maintain an optimal banking relationship for your checking accounts to which we grant Board access to view activity. Additionally, we also aid in the selection of FDIC insured institutions with competitive interest rates for the placement of your reserve funds.
- Our **in-house Collections team** is led by a well-versed A/R and Collections Manager with over 20 years of experience in the industry working with our communities and an extensive portfolio of Attorneys which we have established a strong working relationship.
- Our **in-house Facility Management and Maintenance Departments** are available 24/7 in conjunction with our emergency services program to respond to your community's needs. Through these integrated departments, we can provide expertise in the management of your facilities to include but not limited to tennis courts, putting green, swimming pool, volleyball court, tot lots, pocket parks and walking trails.

OUR SENIOR TEAM

MEET OUR LEADERSHIP TEAM

ACM's key strength is its talented and experienced professionals. As a result, we seek to attract and retain high-quality personnel to provide the best customer service experience to our communities. We understand the "community" in community management. "Community" is a feeling of mutual benefit and unity with others, manifested by sharing common attitudes, interests, and goals. We emphasize this culture within our company under the leadership of the following individuals:



**Theresa McCoy, CPA
Chief Executive Officer**

Theresa joined ACM as Vice President of Accounting in 2009 and was later appointed Chief Operating Officer of ACM in June 2015. With almost twenty years of experience working with management in a variety of businesses to include advising leadership, Theresa has been instrumental in implementing several managerial and financial reporting/banking enhancements. As CEO, Theresa directs the day to day operations of the company servicing over 200 HOAs and Condominiums in Maryland. Her primary focus is on promoting customer service above all, strategic initiatives, reinforcing strong corporate leadership, the efficiency of operations and business development. Theresa will continue to develop, retain and attract top-notch talent, to enhance the delivery of ACM's core and ancillary services.



**Heather Griffing, CMCA,
AMS
Vice President of
Administrative Services**

Heather executes her leadership of the administrative services team with a positive, innovative and inspiring attitude. Heather has held multiple positions serving in the Community Administrative, Community Management & Property Management Departments. Heather has over 10 years of experience providing high-quality customer service and uses those skills as she leads several departments to include the Community Administrator Team, Accounting and Administrative Contracts and Resale Team. She has been instrumental in planning and delivering training to provide the best experience for our customers, as well as facilitating enhancements to our integrated management platform.



Charlene Pindell, CMCA, AMS
Vice President of Community Management

Charlene governs the community management group with care, guidance, one-on-one devotion toward addressing staff at all levels to equip them to face all aspects of community management. She is a prized resource, having been a member of the ACM team for over twenty years. Charlene has managed many of the communities in our Baltimore portfolio since ACM's inception in 2001. She has more than 20 years of experience in all phases of community and property management. Her very diverse portfolio has also included construction and rehabilitation projects involving detailed oversight. Charlene's collaboration and influence with community members, association Board members, and local officials have been an asset to ACM's clients.



Melody Flippo CMCA, AMS
Regional Community Association Manager,

Melody serves as the leader of a group of talented portfolio managers. She has over 20 years of combined experience in the community management and landscaping industry. She has experience with large associations, to include master associations with complex community governance concerns. Melody offers a warm demeanor and welcomes a challenge. Her responsiveness and interpersonal skills are well-received by her Boards and homeowners, alike. Melody exudes high standards of attention to each and every client.



Sheri Courtock, CMCA, AMS
Regional Community Association Manager,

Sheri serves as the leader of a group of talented portfolio managers. She has over 20 years of combined experience in the community management. Sheri began her career in community administrative management in 1999, as an Administrative Assistant, an ambitious team member of a training/advancement program dedicated to elevating hardworking employees. Since ACM's inception in 2001, Sheri has managed many of the communities in our Howard County portfolio, repeatedly proving her solid work ethic and high standard of performance. Her excellence in service has resulted in referrals from several community Board members, which has helped grow ACM's client base.



Richard Cosgrove, MHIC
Director of Property
Maintenance

Richard is responsible for the identification, implementation, and completion of our community maintenance needs. Richard has held a Maryland Home Improvement License for over 22 years. His focus is on sustaining customer satisfaction through the assurance of the successful implementation of maintenance services. Richard's training and diverse experience include residential and commercial construction, which consist of management, sales, and design. With over 14 years' experience in the field of property management, and over 30 years' experience in the construction industry he is able to implement his insight and experience into business development, sales, and planning initiatives.



David Boyce
Senior Facility Manager

David is a senior member within ACM's facility/property management division. He has been with ACM since 2015 and in the property management field for over 30 years. Among his roles was having served as a director of operations and procurement, regional vice president and regional property manager. David routinely visits ACM communities to assess the condition of the physical property, coordinates with vendors in the delivery of services, oversees major projects and reports recommendations to Boards in conjunction with the community manager. David frequently participates in strategic discussions on how we can leverage ACM's network and bring value-added products and services to our communities. David managed the implementation of the Community Owners Buying Organization (COBO) providing access to low-cost building materials to homeowners. David also facilitated earning thousands of dollars for several ACM clients by working with utility providers.



Joanne Allen
Collections Manager

Joanne serves as our in-house collections professional. She solves a critical challenge facing many communities. As a key team member, she works closely with ACM community managers and attorneys as a primary liaison. Mitigating delinquent assessments is an important component of managing community cash flow. Joanne has over 20 years' experience in the community management industry with a specialized understanding of collections and its intricate processes. She has built a longstanding rapport with attorneys in the industry over the years. Joanne is a firm believer in educating the board on the legal and collection matters. She is part of a dynamic team that promotes current legislation and presents Board-focused seminars. Joanne has brought a value to our company and our communities unlike no other.

PACKAGES OFFERED

American Community Management knows that each community is unique, and we are proud to offer two types of service options for newly developed and established communities from which to choose. The first is defined as **"FULL-SERVICE ADMINISTRATIVE COMMUNITY MANAGEMENT"** package which includes the service of community managers along with our full spectrum of financial, accounting, administrative and facilities management services. We always strive to exceed the Board's expectations. We offer a unique solution to self-managed communities by way of an **"ADMINISTRATIVE AND ACCOUNTING ONLY"** package which supports the HOA in carrying out its routine functions. We do offer a-la-carte options with this plan such as; maintenance staff, community and property managers as needed for an hourly fee.

OUR SERVICE TEAMS

ACCOUNTING SERVICES

Provides timely accounting for all transactions using Union Bank Homeowner Association Services and Jenark Integrated accounting system, reconciled and reported monthly.

- Maintain operating and reserve fund-level accounting as required by generally accepted accounting principles (GAAP)
- Accounts Payable Automation/Timely Payments to Service Providers.
- Collection of assessments and generation of late payment notification to homeowners.
- Bank account management and reconciliation.
- Provide support during the development of the annual association budget.
- Specialized collections service to include timely monitoring, escalation notices sent resulting in more payments collected before the turnover, routine contact with the association's collections attorney, review and reporting of legal action and strategically addressing severe delinquency issues with the Board.

COMMUNITY ADMINISTRATION SERVICES

Responds to routine homeowner inquiries ensuring responses within 24-hours or less.

- Maintain maintenance request database and route work orders based on pre-selected vendors as directed by the Board.
- Log, follow-up on and route architectural applications, follow-up on homeowner violations.
- Provide support for training with Board members in the use of various systems.
- Arrange homeowner mailings including but not limited to notices and flyers and announcements at the direction of the Board.
- Incorporate pertinent association documents and workflows within the centralized online management system.

- Maintain property documents, call logs, homeowner unit files, inspection documentation, meeting minutes, governing documents, and contracts on the community website.

COMMUNITY MANAGEMENT SERVICES

Specialized knowledge in forging effective homeowner/board and manager/board relationships and covenant enforcement

- Attendance at Board Meetings and maintain Board Actions items list.
- Monthly management report provided to the Board outlining all activities.
- Management and oversight of on-site community to include performance evaluation.
- Review community recurring service contracts and insurance policies, annually.
- Assist with preparation in advance of and during the annual meetings.
- Present annual budget to the Board.
- Advise on state and local regulatory requirements and provide guidance pertaining to the association's governing documents.
- Coordinate all parties (homeowner, board, contractor and insurance broker) as it relates to insurance claims.
- Assist with escalated homeowner concerns beyond the day to day matters.
- Attend court on behalf of the community for collections.

FACILITY AND PROJECT MANAGEMENT SERVICES

Assists the Board of Directors in the maintenance of the common elements of the Association by making observations during bi-weekly visits.

- Serve as liaison with service providers to facilitate community needs and Board requests in the delivery of services.
- Create and maintain files to include electronic documents of community association construction plans and materials, reserve studies, record plats, and warranty information for all major structural components owned by the Community Association as provided by the Association.
- Provide procurement support by assisting the Board in securing the services of contractors to perform maintenance services such as lawn maintenance, trash removal, snow removal, engineering for major improvements, emergency repairs, and replacement items set out in the Community Associations Replacement Reserve Study.
- Report any observations related to the status of facilities owned and operated by the Association.
- Assist the client in the negotiation of contracts for special projects.
- Assist the Board in preparing facility maintenance and improvement budgets.

TECHNOLOGY TO MANAGE

Our systems benefit your Community by streamlining processes and providing greater ease of access to information. By investing in the services of companies such as **CoreLogic Jenark**, **Union Bank HOA Services**, and **eUnify**, we have been able to create a platform to streamline information seamlessly and efficiently for our clients, in a fashion that few others can deliver. Proactively pursuing new and innovative ways to assist our associations and deliver services is our priority. This approach and philosophy will remain steadfast as we move forward. Descriptions of our current systems and some of their beneficial features are as follows:

CoreLogic Jenark Accounting/Property Management Software

CoreLogic Jenark's acclaimed software is specifically designed for the property management industry. This system allows ACM the ability to streamline accounting documents and other pertinent information accurately and efficiently, securely transmitted through a centralized database, accessible online 24 hours a day.

ACM Interactive Web-based Community Portal

ACM currently utilizes eUnify which is an innovative community management software that has enabled ACM to deliver a far superior product to our clients. This provides a most reliable system for our managers to easily enter, view, store, track, and update documents. eUnify's unique platform permits all homeowners to submit requests directly through the web portal enabling fewer emails and increased response time. It also enables board members to view information via a simple connection through ACM's community website portal, www.acmhome.com.

ACM is currently evaluating and designing a new, enhanced solution partnered with Ciracconnect and will pair your community with the solution that works best for our clients.

Union Bank HOA Services

Union Bank HOA Services, a division of Union Bank is catered specifically to the needs of community associations and the professionals who manage them. Union Bank HOA Services saves customers invaluable time by processing all payments automatically and no banking fees are assessed for their service. With Union Bank HOA Services, once you establish your personal account through ACM's community website portal, you can conveniently make electronic payments to the association's account.

SAMPLE Q & A

In this section, we have included the summary of hypothetical questions which a Board may ask and our response provided beneath under the headline "ACM RESPONSE". We encourage you to contact us directly for further information about us and/or our services. Thank you for your interest.

A. What percentage of your firm's business is dedicated to managing community associations?

ACM RESPONSE

ACM has dedicated 98% of its business to managing residential homeowner's associations, condominium associations, co-ops and 2% to commercial property management in the state of Maryland.

B. Describe the unique features your firm can bring to our Association.

ACM RESPONSE

ACM strives to be an innovative community administrative management organization working in partnership with the governing body to forge a satisfying community experience. Our success is built on the pillars of Communication, Integrity, Professionalism & Transparency in Business and Governance. Unique qualities include:

- Emphasis on Board Education
- Cultivation of Community Management Professionals via ACM Training Program
- Facilitation of Annual Tax & Audit with an Experienced Accounting Staff
- In-House:
 - Collections Department with Established Attorney Relationships
 - Maintenance & After-Hours Emergency Service
 - Project Management & Contractor Vetting
 - Designated Resale Coordinator
- Uniform Integrated Quality Control

C. What is your transition plan to assume responsibility for our community?

ACM RESPONSE

Upon execution of the contract, a transition letter is sent to the prior Community Management Company. ACM sends a three (3) part transitional checklist consisting of an initial request, secondary request, and a final closeout request.

INTRODUCING THE ACM CUSTOMER SERVICE CALL CENTER

At ACM, we strive to keep up with the changing business environment and employ futuristic thinkers who actively listen to our customers. All team members play an integral role in creating the ideal customer experience. We are launching a fully functional and resolution-oriented call center by Fall 2018 led by a customer service expert and joined by team members who are well-trained and have instant access to the specifics of our communities. We want to ensure homeowners always hear a live voice when calling in and ensure each of them has a positive experience. Additionally, to forge one on one relationships, community administrators are assigned to specific communities who respond to homeowners' needs immediately, effectively and respectfully whenever follow-up is necessary. This structure will allow community managers more dedicated time with Board members and to maintain an onsite presence.

CLIENT REVIEWS

Chris Fath

"I had the pleasure of working with the ACM team. Specifically, Heather Griffing went above and beyond what I could have expected. Thank you so much for all your help. You all are the best!"

Mike Cooley (Google Review)

"I am the elected President of the HOA. It has been my pleasure to work with Ron Rims for the past 10 years. I am grateful on a daily basis for what they do for us. This position would be impossible without their support."

Nancy on the Summerhill Board:

"As you know Kimberly Snyder and I did inspections today. Since this was the first time ACM did this for us, I accompanied her to see how and what would be cited. I feel secure in saying we can hire ACM to continue doing this. Kimberly did a great job and we were in full agreement as to what to cite."

Harvey Fort (Google Review)

I rarely post reviews but I had to take a moment to write about the good work that Carole Brady and Ruth Cook are doing at American Community Management. I recently drove through the property and gave it a thorough inspection. I was so pleased with the detail that they both have given to the maintenance of the grounds. It was beautiful. More impressively, their management prowess helped the Board of Directors and the legal team return our association back to an FHA compliant community. We were one of those communities who struggled through "Housing Crises" so this has been a huge relief to the homeowners. Being a property manager is a thankless job. Most of the time people are calling to complain about something. As a former board member, I am so impressed with the continued customer service provided by these remarkable people...

Karen <km*****@yahoo.com> wrote:

"Thank you so much, Tatiana. You are the absolute best, great customer service. Thanks so much."

Andrew Hoch (Google Review)

Emily at ACM is a game changer. Emily couldn't have been more helpful in assisting me, as a homeowner in need, with getting an HVAC Tech / Plumber to my home to correct what could have become a significant problem. I did not wait on hold, Emily listened patiently, assessed the situation correctly, and called the right service provider - who was subsequently dispatched promptly. Emily also showed initiative and compassion for the residents of the surrounding units who could also be affected and made sure to say that all the affected parties would receive the assistance they needed as well. My follow-up call to ensure that the charges for said services were allocated to ACM because of the nature of the issue was not met with any denial, debate, or finger-pointing, rather ACM took full responsibility, which I found incredibly refreshing as a customer. The negative experiences and ratings posted below were not reflective of my experiences with Emily at ACM who I would gladly call again.



MEMBERSHIPS AND ASSOCIATIONS

BETTER BUSINESS BUREAU (BBB) OF GREATER MARYLAND (BBB)

COMMUNITY ASSOCIATIONS INSTITUTE (CAI)

INSTITUTE OF REAL ESTATE MANAGEMENT (IREM)

NATIONAL ASSOCIATION OF HOMEBUILDERS (NAHB)

ACAM-CEO

COMMUNITY OWNERS BUYING ORGANIZATION (COBO)