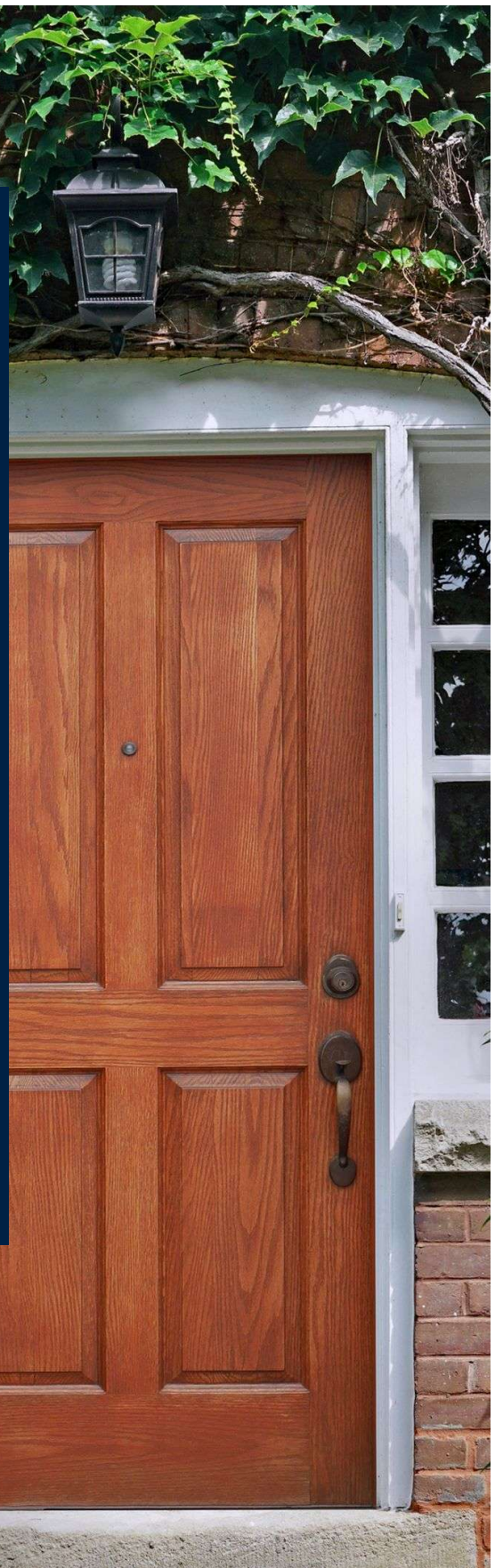




Bringing Community to You.

Proposal for
Full-Service Management

Prepared for:
Cinnamon Lakes Condominium
Association of Unit Owners



5/14/2024

RE: Request for Proposal

Dear Board of Directors,

It is our pleasure to present Blue Mountain Community Management, An Associa® Company to the Cinnamon Lakes Condominium Association of Unit Owners Board of Directors. As outlined in this proposal, our experienced community management professionals and value-added services are tailored to serve the specific needs of your homeowners, residents, and each of you as board members.

As your professional management partner, we will use an array of solutions and resources to provide nothing short of an exceptional community management experience. Our highly trained local teams are responsive problem solvers obsessed with delivering on our 5 Star customer service promise every day.

We look forward to learning more about your vision, goals, and challenges to provide a deeper dive into your service needs and show you why we are the right partner for Cinnamon Lakes Condominium Association of Unit Owners. We will offer you proactive and innovative solutions for your consideration, with an emphasis on open communication, attention to detail, and cost containment always.

We appreciate the board's careful consideration of this proposal and believe that Blue Mountain Community Management, An Associa® Company will provide the partnership and high level of service you envision for your association.

Sincerely,

Tracy Kuehl
Business Development Manager
Blue Mountain Community Management, An Associa® Company
(503) 858-8978
tracy@bluemountaincommunity.com



I have lived in two Blue Mountain communities and am very happy with the prompt, personal, & professional service received. Highly recommend them to associations that could benefit from their expertise and experience.



Table of Contents

Meet the Team	4
Local Experts. Proactive Management.	5
Services Overview	6
Expert Community Management	7
Training & Education	8
Secure Technology	9
TownSq App	10
On-Demand Professional Maintenance	11
Associa OnCall	12
Transition Process	13
Your Investment	14
The Associa Difference	15
Associa Cares	16
Associa Advantage	17
Lifestyle Services	18

Meet the Team

We serve as an all-in-one partner to Cinnamon Lakes Condominium Association of Unit Owners. With our proven technology solutions and highly skilled teams, the professional relationship we bring to a board and homeowners is best in class. Our culture is embodied by our family spirit and shared with our clients. We are involved in the communities we manage, supporting you, and making a difference. The more we get to know the communities we serve, the more effective we can be, working together as a team.



Caren Fewell, CMCA®, PCAM® – Branch President

As a team-focused leader, Caren supports the branch in delivering exceptional service and value to the boards and communities we serve. Caren specializes in building cohesive and productive teams, building relationships with boards, owners and residents, as well as team training, mentoring and coaching. Budget development and financial management are also specific areas of focus and expertise, helping to create value for the team and clients.



Carrie McGonagle, CMCA®, AMS®, PCAM® – Senior Branch Vice President

Driven by efficiency and operational rhythm, Carrie supports her team in providing modern-day solutions to everyday issues by looking at them through a different lens. She works with our team of management professionals to create common sense solutions that meet our clients' everyday needs and respect their time and position. As a Pacific Northwest native, Carrie understands the unique needs and obligations of our associations and how they grow and adjust over time.



Tracy Kuehl – Business Development Manager

With a passion for real estate and prior HOA management experience, Tracy Kuehl has rejoined Blue Mountain Community Management as Business Development Manager. In her role, Tracy works diligently with our operations team and potential clients to introduce them to all the services and programs that Associa can provide. Tracy has a proven ability to build relationships and deliver outstanding customer service through ongoing communication and education. She has been able to transition to the role of Business Development Manager with ease and plans to continue growth in the Portland market by onboarding exceptional communities seeking premier management and a long-standing partnership.

We are part of the Associa family of HOA management firms. Associa's 42 years of experience gives our locally operated branches the resources they need to deliver for you.



Recognizing private company success



Local Experts. Proactive Management.

Blue Mountain Community Management, An Associa® Company offers the full spectrum of HOA, condo, and mixed-use property management services. Our local talented teams demonstrate our values and lead the industry in training and earning professional certifications and designations. With local expertise and strong leadership, we take pride in helping the associations we serve achieve their vision.



2008

Business Established



1

Local Office



6

Local Team
Industry Designations



3,000+

Local Communities Served





Services Overview

We are here to help your association be successful. Your goals for Cinnamon Lakes Condominium Association of Unit Owners are our goals.


Whether you are a self-managed association looking for additional support, or a master-planned community seeking full-service management, our experienced team can customize a plan that's right for you. The transition from your current management company to Blue Mountain Community Management, An Associa® Company requires great attention to detail. You will have our expert support every step of the way.



Expert Community Management



Secure Technology Solutions



On-Demand Professional Maintenance



WATCH AN INTRO TO ASSOCIA VIDEO



Expert Community Management

We like to say that Blue Mountain Community Management, An Associa® Company helps make community happen. Why do we say this? Because creating a vibrant and engaged community doesn't just happen on its own. It happens when you pay attention to the small details and the big picture. We will advise, recommend, and support you on all the decisions and activities that can enhance and preserve the longevity of your community. The services below are just a sample of what we can do for your association.

TOP-TIER MANAGEMENT SERVICES

- Professional board consultation
- Local customer support team
- Contract negotiation and contractor supervision
- Complimentary board orientation and seminars
- Insurance management

BULLETPROOF FINANCIAL MANAGEMENT

- Comprehensive, real-time financial reporting
- Budget analysis and preparation
- Investment fund monitoring
- Accounts payable and accounts receivable services
- \$6 million fidelity bond, the industry's highest level of protection

PROACTIVE COLLECTIONS & ENFORCEMENT

- Governing documents enforcement
- Delinquency and violation notices
- Delinquent account management
- Third-party collection agency
- Call center, lien recordation, personal litigation, and foreclosure action

FAIR ELECTIONS & GOVERNANCE

- Preparation of board updates and meeting packages
- Board portals for access to financials, work orders, private messages, and violations
- Homeowner portals for access to meeting schedules, minutes, voting capabilities, and surveys
- Architectural and design review services
- And more!



Training & Education

At Associa, we invest in our employees in ways that matter to you. When it comes to employee education, training, and development, we are proud to lead the way in the HOA management industry. We are committed to serve our clients with well-trained, empowered, and motivated team members.

We equip our team members with the tools they need to strengthen their expertise and continue their education through our comprehensive learning program, Associa University. Associa University facilitates career advancement and professional skill elevation by offering a classroom experience, virtual instruction, and a customized platform with a specialized curriculum for every role. Through Associa University, we also provide:

- Support for industry certification and advanced designations
- On-demand online learning
- Collaborative learning groups
- Career path and ongoing development opportunities
- Webinars presented by our learning partners (DeVry University, University of Dallas)
- Special tuition discounts with our learning partners
- Skill assessment and leadership development

“As a condo owner for 18 years and a board member for 10 years, I couldn’t ask for a better management company.”





Secure Technology

To maximize the security of sensitive information and assets, we have built our IT infrastructure based on the privacy and protection of funds, transparency, and efficiency. We utilize cutting edge software to meet these requirements.

COMMUNITY MANAGER DASHBOARD

Our Community Manager Dashboard enables managers to communicate across teams, deliver financials, and manage timely tasks and assignments from a single, remote-accessible dashboard.

STRONGROOM

Strongroom is a best-in-class product that provides both unparalleled safety and convenient, enterprise-level verification measures and secure access to review and approve your invoices.

- Complete data protection
- Centralized invoice processing
- Automated invoice approval workflows

VENDOR ACCESS PORTAL

This portal gives trusted vendors a centralized, easy-to-use interface where they can verify documents such as tax and insurance forms, invoices, contracts, and process payments efficiently and securely.

COMMUNITY ARCHIVES

Community Archives provides no-hassle document retrieval. Our real estate document solution delivers critical property information to Realtors®, title companies, attorneys, mortgage lenders, and homeowners.

TOWNSQ

Through our partnership with TownSq, we offer an innovative all-in-one app for managed communities.

- Online payment capabilities
- Real-time reporting
- Seamless communication tools
- Document storage
- Package management
- Custom community websites
- Architectural Requests
- Amenity reservation management
- And more!



TownSq App

COMMUNITY LIVING HAS NEVER BEEN EASIER.

Designed as an all-in-one solution for managing communities, TownSq delivers the most complete, mobile experience by helping you connect, collaborate, and stay up to date on everything happening in your community. Improve and simplify your daily responsibilities while ensuring homeowner voices are heard with the TownSq app.

CONNECT

- Easily communicate with your neighbors, community management team, and board
- Access and update your account
- Pay online and review account balances anytime
- Make your voice heard with community polls
- Post community updates and announcements quickly
- Save time and reduce paperwork

COLLABORATE

- Submit work orders, service, and architecture requests with no hassle
- Reserve and manage common areas and amenities
- Manage committee special projects and assignments
- Get up-to-date community news and events
- Receive status updates on your requests
- Schedule push notifications for upcoming projects and completed assignments
- Upload and access association documents whenever you need



www.townsq.io

AVAILABLE ON





On-Demand Professional Maintenance

Maintenance is vital to protecting and preserving real estate values in your community. It can also be daunting and time-consuming. Associa OnCall offers expert services for hassle-free maintenance to assure your peace of mind. Our teams are licensed, insured, bonded, and compliant with OSHA regulations. They can provide a broad range of services to ensure your community maintains property values and preserves the investments you make.

MAINTAINING YOUR COMMUNITY

- Care and oversight of common areas, landscaping, and repair services
- Community inspections and property condition monitoring
- Routine maintenance and unexpected repairs
- Capital projects
- Needs assessment and reserve fund analysis
- Preventative maintenance programs
- Project management and oversight
- Log, review, and dispatch service requests
- Upload violations to management software in real-time via our mobile app
- Submit work order requests anytime online or via our mobile app
- Vendor review and assessment
- And more...just ask us

“As a board member, I feel empowered to make good decisions about my community; a significant part of that is the toolkit provided by our Associa team.”





Associa OnCall

YOUR COMMUNITY MAINTENANCE SOLUTION

The upkeep of your community or home is essential not only for retaining property values, but also for security and peace of mind. With Associa OnCall, you can count on expert service from a trusted local vendor, and rest assured that all your maintenance issues can be resolved with a simple phone call. Our trained and certified technicians are available to your community on an hourly or contract basis to carry out a broad portfolio of association-related services, including:

AMENITIES

- Pool & playground maintenance and cleaning
- Fitness room sanitizing
- Common area & shared space disinfecting
- Building perimeter upkeep
- Janitorial services for guest rooms
- Parking garage sweep & clean
- Garbage area deep cleaning
- Air filter inspections

EXTERIOR

- Lighting inspections/replacements
- Roof maintenance
- Envelope repairs
- Porter services/grounds cleanup
- Siding, trim, & concrete repairs
- Sign installation and replacement
- Pressure washing
- Winterizing
- Painting

MISCELLANEOUS

- Dryer vent upkeep
- Gate repairs
- Electrical repairs
- Equipment tune-ups
- Plumbing
- Pet waste removal
- Garbage container maintenance
- New development & one-time clean-ups
- Pest management

AssociaOnCall
Expert service from a trusted neighbor

When you require assistance with repairs, installation, or supervision Associa OnCall is here to help.

Transition Process

We have a dedicated transition team that works with your manager, current company, and association to ensure a professional, seamless transition. This process involves reviewing financials, governing documents and CC&Rs, and past meeting minutes and policies. It also involves vendor contracts and scopes of services while collecting all homeowners' fees and balances, holding vendor walks, and board orientation or meet-and-greet.

PHASE 1

FINANCE & ACCOUNTING

- Obtain tax ID, assessment rates, unit details, annual payment plan, current financial statements, budget, vendor listings, banking signature cards, contractor information, payroll information
- Identify most recent tax return and franchise return
- Present collection policy to the board for approval
- Set up resale/transfer and refinance process
- Review delinquent accounts
- Review all existing collection letters and setup new letters
- Meet with board to review the budget

OPERATIONS

- Review community layout
- Review transition and internal audit of documents
- Review articles of incorporation, bylaws, amended and restated CC&Rs
- Document residential guidelines
- Gather resolutions, meeting minutes, pertinent reports
- Obtain insurance certificates from insurance agents and present Best Practice policies to board
- Establish new SOPs
- Review reserve study
- Meet vendors and determine status (*if applicable*)
- Design welcome package

COMPLIANCE

- Review deed restrictions and enforcement
- Review all existing covenant violation letters and setup new letters
- Load architectural modifications into software
- Drive property with inspectors

COMMUNICATION

- Meet with board for a transition session
- Review website or create new site
- Contact all association members
- Notify contractors, insurance, city/county and vendors
- Schedule initial meet and greet between board & the management team

TRAINING

- Onboard executive staff
- Develop training calendar (*if necessary*)
- Train community manager
- Review and train association on policies
- Train vendors on AVA process
- Board orientation and training

PHASE 2

FINANCE & ACCOUNTING

- Discuss financials and inform board of any discrepancies
- Make recommendations on current financial state
- Determine annual and long-range goals
- Implement collections process approved by board

OPERATIONS

- Inventory all facilities and assets
- Establish annual calendars for management, vendors, and the association membership
- Instruct community manager to evaluate all processes

COMPLIANCE

- Drive property again and give inspectors direction on all established and new enforcement procedures

- Community Management team performs initial inspections with all stakeholders
- Review all pending covenant violations

COMMUNICATION

- Conduct initial meet and greet between board & the management team
- Schedule initial meet and greet between the association and the management team (*optional*)

TRAINING

- Continue training procedures for community manager
- Complete all software training with board and other users
- Adjust processes and procedures as needed

PHASE 3

BOARD EVALUATION

- Executive staff and board to evaluate community manager

COMMUNICATION

- Board invite to TownSq
- Homeowner welcome and invite to TownSq

Your Investment

Thank you for the opportunity to present how we can work with your community to achieve its vision. If you have any questions about the contents of this proposal, please reach out to tracy@bluemountaincommunity.com. We look forward to the possibility of becoming your community management partner and helping your community thrive.

AT A GLANCE PROPOSAL INCLUDES:

ADMINISTRATION

- Care and oversight of the building and common areas
- Screening and assistance in selection of vendors and management of contracts
- Resale processing, documentation, and transfer management
- Insurance and claims management
- Advanced compliance inspections
- Facilitation and access to providers for project loans
- Project management and facilitation
- Assistance in rules enforcement

FINANCIAL

- Preparation of annual budget
- Maintenance and reconciliation of bank accounts
- Preparation and distribution of financial reports
- Collection of assessments
- Set up of account payment systems
- Delinquency collection reports
- Tax and audit facilitation
- Provide accounts payable and financial accounting services

COMMUNICATION

- Full customer service department for residents (phone calls, emails)
- After hours call center for emergencies
- With TownSq, residents can manage their accounts, pay online, get up-to-date community news and events, request and review status of service inquiries, any time from any device.

We are pleased to guarantee the management fees quoted below for the next sixty (60) days, providing you the necessary time to evaluate the value and services included in this proposal.

YOUR MANAGEMENT FEE INCLUDES:

- Preparation of monthly financial report.
- Attendance at four (4) virtual and one (1) in person meeting annually.
- Quarterly compliance visits.

MONTHLY MANAGEMENT FEE

\$1,300.00

ONE-TIME SETUP FEE

\$1,300.00



The Associa Difference

We are committed to making a real difference for our clients. When you partner with us, your community association and homeowners get access to unmatched programs and services. In short, we put the power of our national resources to work for YOU.

ASSOCIA ADVANTAGE

- A national program offering deep discounts from trusted vendors like The Home Depot and Orkin – saving you time and money.
- A waste hauling and recycling service that leverages a collective buying power pool to ensure your community has the best rates for these services.
- An energy saving program that provides significant electricity savings to Associa managed communities.
- A streamlined Amazon delivery service providing safe and secure access and saving staff time on package management.
- Learn more at [associaadvantage.com](https://www.associaadvantage.com).

ADDITIONAL BENEFITS

- A restoration service that has helped hundreds of communities rebuild after disasters like floods, fires, and hurricanes. Learn more at [lhrpros.com](https://www.lhrpros.com).
- A one-stop source for exceptional, affordable insurance for community associations. Learn more at [associationsinsuranceagency.com](https://www.associationsinsuranceagency.com).
- A commitment to support living in healthy and sustainable ways. Learn more at [associagreen.com](https://www.associagreen.com).

ASSOCIA CARES

- A culture driven by our values to make an impact for families in the communities where we live, work and play. Learn more at [associacares.org](https://www.associacares.org) and [associasupportskids.org](https://www.associasupportskids.org).

“ We have the most advanced services, technology, and products to help achieve your vision and serve your community. I invite you to discover how Associa is making a difference in communities across North America and how we can do the same for yours.

– John Carona, Founder & CEO

”



Associa Cares

ASSISTING FAMILIES & COMMUNITIES IN CRISIS

Associa Cares is a 501(c)(3) nonprofit organization created to assist families and communities in crisis as a result of natural and man-made disasters. Funded entirely by tax-deductible donations of Associa employees and concerned citizens across North America, we administer resources to where they are most needed.

We help people get back on their feet and recover as quickly as possible by:

- Responding to both Associa-managed and non-Associa communities in need
- Motivating our employees and clients to join us in making a difference
- Raising funds and safeguarding financial resources to fulfill our mission

And it is all done with time donated by Associa employees.



\$127,900

in U.S. & Canada COVID-19 relief
community grants to
local nonprofits



\$327,000

distributed in global assistance



\$4,000,000+

distributed to over 3,000
families since 2017

ASSOCIA  CARES®

214.272.4141 | 800.808.4882 | info@associacares.com | www.associacares.com

Associa Advantage

EXCEPTIONAL VALUE. EXCEPTIONAL LIVING. SIGNIFICANT SAVINGS START HERE!

Associa Advantage puts purchasing power in your hands. We create partnerships with well-known brands and negotiate discounted prices based on our substantial buying power. Then we make these savings opportunities available to your association, saving you time and money. All national and local vendors are pre-screened and vetted, so you know you will get expert service from people you can trust. And best of all, this is available to Associa-managed communities at no extra cost.

PARTNER CATEGORIES

- Elevator service
- Fitness equipment
- Janitorial supplies
- Landscaping
- Maintenance supplies
- Paint supplies & services
- Pest control
- Pet waste supplies & services
- Plumbing
- Security
- And more!

FEATURED PARTNERS



SHERWIN-WILLIAMS



Staples

1-800-GOT-JUNK?





Lifestyle Services

Coming together and connecting with friends, family and neighbors is more valued than ever before. To enrich the quality of life and enhance the vibrancy of your community, we offer a wide variety of lifestyle services that build a sense of belonging, give residents a chance to meet neighbors, and of course, have fun.

Our dedicated lifestyle directors are experienced in designing programs for every type of community and can create a schedule of ongoing and one-time events to boost revenue and involvement. They are supported with extensive resources to relieve you of the work and stress that comes with planning and hosting your own events.

WE ARE HAPPY TO COORDINATE AND MANAGE EVENTS LIKE:

- Movie nights
- Wine tastings
- Golf and tennis tournaments
- Summer barbecues and cookouts
- Holiday parties
- Building grand openings
- Learning opportunities for all ages
- Community-building events through Associa Cares, Associa Supports Kids, Associa Green, and National Night Out



Enriching the Place You Call Home

We believe in setting high standards and are obsessed with delivering world-class customer service to your community. At Blue Mountain Community Management, An Associa® Company, building strong and enduring partnerships with our clients is at the center of everything we do.

To bring positive impact and meaningful value to every community.

Tracy Kuehl

tracy@bluemountaincommunity.com | (503) 858-8978

