

HENDERSON PROPERTIES

Preliminary Bidding Questionnaire

Association Legal Name: _____

Master Association: _____

Cross Streets: _____

Contact Person: _____ Title: _____

Address: _____ City: _____ State: _____ Zip: _____

Work Phone: _____ Home Phone: _____ Cell: _____ E-mail: _____

Property Description

Total Units: _____ Type of Units: _____ Year(s) Built: _____

Common Area Amenities: ___ Pool ___ Clubhouse ___ Sauna ___ Sport Court ___ Other: _____

Rental factor in your Association: _____ % (estimate)

Security gates or entrances: _____

How would you rate the physical condition of the property?

Buildings: _____ **Grounds:** _____

When did you last paint?

Buildings: _____ **Last roof replacement:** _____

When did you last re-pave and perform major concrete work? _____

Is there a need for an annual concrete and/or re-paving program? ___ Yes ___ No

Do you have a common hot water boiler? Sewer System: **City** ___ **Private** ___ **Septic** ___

Do the properties have reoccurring problems such as breaking water lines, rotten wood, peeling paint, or leaky roofs, etc.?

___ Yes ___ No **Explain:** _____

Please describe the problems that need immediate attention: _____

Future Improvements

What major projects are scheduled in the next 3 years?

Drainage ___ **Painting** ___ **Resurface Parking Lots** ___ **Decks** ___

Electrical ___ **Amenities** ___ **Tot Lot Replacement** ___ **Sidewalk Repairs** ___

Other _____

Vendors

Landscape maintenance company: _____

Other: _____

Insurance

Name of Insurance company: _____

Renewal Date: _____ Any outstanding claims? ___ **Yes** ___ **No**

If yes, provide overview: _____

Accounting Information

Assessments/Dues: HOA Fee \$ _____ Special Assessment: \$ _____

Billing Frequency: **monthly** ___ **quarterly** ___ **annual** ___

Fiscal year end: _____ Budget year end: _____

(Please attach a copy of current budget.)

Do you have employees? ___ **Yes** ___ **No** If yes, how many? _____ Position: _____

Has a Reserve Study been completed? ___ **Yes** ___ **No**

When was it last updated? _____ **By whom?** _____

Are your Reserve Accounts being adequately funded? ___ **Yes** ___ **No**

Current Account Balance: \$ _____

Percentage of current delinquencies: ___ % Do you have a Collection Policy Resolution? ___ **Yes** ___ **No**

Who did last years' tax return? _____

Current Management and Procedures

Current management company: _____

Explain rule violation problems in your Association: _____

Rule violation enforcement procedure: _____

When did you last update your Rules and Regulations? _____

Do you publish a newsletter? ___ **Yes** ___ **No** How Frequently? _____

Who writes, publishes and distributes the newsletter? _____

Board/Membership Activity

of Board Members: _____ # of Committees: _____ Average Committee Size: _____
Board meetings held: _____ monthly _____ quarterly **other** _____
Location: _____ Time: **from** _____ **to** _____
Annual meetings held during the moth of: _____
Location: _____ Time: _____ Estimated Attendance: _____

Legal

Other than routine collection work is your Association involved in any litigation? _____ **Yes** _____ **No**

If yes, please provide an overview of the nature of dispute: _____

Association attorney: _____

Miscellaneous

What are your reasons for bidding management?

What type of Community Manager would be best suited to the personality of the Association and the Board?

Additional comments: _____

How did you learn of Henderson Properties? _____

Referred by: _____

Date

Signature

Position with Association

Please Print Name

**Please mail to Phil Henderson @ 919 Norland Road, Charlotte NC 28205
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