

# HENDERSON ASSOCIATION MANAGEMENT

## 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

Individually metered for water (town homes and condos)? \_\_\_ Yes \_\_\_ No

Do you have a common hot water boiler? Sewer System: City \_\_\_ Private \_\_\_ Septic \_\_\_

Private or public streets? \_\_\_ Private \_\_\_ Public

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 Reserve Act. 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? \_\_\_\_\_  
\_\_\_\_\_

Does your community association have a web site? \_\_\_ **Yes** \_\_\_ **No**

If Yes who hosts the site and is the \_\_\_\_\_  
\_\_\_\_\_

**Website Address**

**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 month 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?  
 \_\_\_\_\_

What is the decision-making criteria the Board will use to select a new management company?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

How did you learn of Henderson Properties? \_\_\_\_\_

Referred by: \_\_\_\_\_

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Position with Association**

\_\_\_\_\_  
**Please Print Name**

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