

SOUTHSHORE METROPOLITAN DISTRICT NO. 2

REQUEST FOR PROPOSAL FOR DISTRICT MANAGEMENT SERVICES INCLUDING COMMUNITY MANAGEMENT

Date: November 6, 2023

A. INTRODUCTION

Southshore Metropolitan District No. 2 (the “**District**”) was organized on December 3, 2002, to serve a residential community development known as Southshore, located in the City of Aurora (the “**City**”), Arapahoe County, Colorado.

A map of the District boundaries is attached. The District operates pursuant to the Consolidated Service Plan for Southshore Metropolitan District Nos. 1 and 2,¹ as approved by the City (the “**Service Plan**”) and by the powers authorized in Title 32, Article 1 of the Colorado Revised Statutes.

The District was established for the purpose of planning for, designing, constructing, furnishing, operating and maintaining public improvements, as well as providing services authorized by the Service Plan, for the use and benefit of the residents and taxpayers of the District. The District has certain ongoing service and community management responsibilities, as further specified in in Exhibit A of the “Bid Form” and attached to this request for proposal (the “**RFP**”). These responsibilities will primarily include District management and administration, public improvement operation and maintenance, including common area landscaping and two recreation centers known as the Lighthouse and the Lakehouse.

Each recreation center is approximately 10,500 square feet and consists of outdoor swimming pools, community rooms, fitness facilities and offices. The recreation centers’ addresses are:

Lakehouse at Southshore
27151 E Lakeview Drive
Aurora, CO 80016

Lighthouse at Southshore
27301 E Southshore Drive
Aurora, CO 80016

Hours of Operation:
9am-5pm Monday thru Friday

Hours of Operation:
10am-8pm daily

Currently operations are performed by the Southshore Master Association, LLC (the “**HoA**”) under a memorandum of understanding. The District is intending to provide the current operator notice of intention to terminate. The District intends to assume operations of all facilities, through the Manager, on April 1, 2024.

¹ Southshore Metropolitan District No. 1 (“**District No. 1**”) is expected to be dissolved in 2023. Once District No. 1 is dissolved, the District intends to change its name to “Southshore Metropolitan District.”

Beyond the memorandum of understanding, the HoA provides trash service and covenant control for the property owners and residents of the District. It is unknown if the HoA intends to transfer those responsibilities to the District. The Manager should be prepared to assume these responsibilities if or when this might occur.

The following District documents are provided with this request proposal for reference:

1. Service Plan
2. District Map
3. 2023 Approved Budget
4. 2022 Audit
5. Master Declaration of Covenants, Easements, Conditions and Restrictions

B. GENERAL INSTRUCTIONS

1. The District seeks proposals from parties interested in being engaged (“**Bidders**”) to provide district management and community management services, beginning April 1, 2024.

2. Bidders may submit proposals for the Work, defined in Exhibit A of the Bid Form, attached to this request for proposal. **All bids are to be delivered to the District c/o David Greher at the address provided below, preferably by email, by no later than 5:00 p.m. on January 2, 2024 (the “Submission Deadline”).**

3. Requests or inquiries regarding this RFP should be directed to:

Southshore Metropolitan District No. 2
c/o Cockrel Ela Glesne Greher & Ruhland, P.C.
44 Cook St., Suite 620
Denver, CO 80206
Attention: David Greher
dgreher@cegrlaw.com

4. **It is understood that this request for proposal is broad in nature and may require on-boarding additional staff, consultants, or formation of a consortium. The Bidder should submit a narrative with a comprehensive business plan for how it intends to structure the delivery of services requested.**

5. Any bid submitted by a business entity must be executed by an authorized officer or agent of the entity.

6. The names of all persons signing the bid must also be legibly printed or typed below the signature. A bid by a person who affixes to his signature the word “president,” “secretary,” “agent,” or other designation without disclosing the principal may be held to be the bid of the individual signing. Evidence of the authority of the person signing shall be furnished.

7. The address to which communications regarding the bid are to be directed must be shown.

C. QUALIFICATIONS OF BIDDERS

In determining the Bidder's qualifications, the following factors will be considered: Work previously completed by the Bidder and whether the Bidder (a) maintains a corporate presence in Colorado and the number of years' experience managing a community with a comparable size, budget and operation and if so, how many such communities; (b) has adequately trained staff or consultants in place and dedicated availability to do the Work properly and expeditiously; (c) has the financial resources to meet all obligations incident to the Work; and (d) has appropriate technical experience; and willing to work closely with Southshore's current management company to ensure a smooth transition of services and records. No bid will be accepted from a Bidder who is engaged in any work that would impair its ability to perform this Work.

D. SUBMISSION OF BIDS

1. The Bidder shall assume full responsibility for delivering its bid to the location designated in Section B.3 above prior to the Submission Deadline. Bids received after the Submission Deadline may not be opened.

2. Oral or telephone bids are invalid and will not receive consideration. No Bidder may submit more than one bid. Multiple bids under different names will not be accepted from a single firm or association.

3. Bids will be accepted from consortiums, with the understanding that the Manager will manage the consortium.

4. **Questions should be submitted in writing by no later than 5:00 p.m. on December 15, 2023.** The questions along with corresponding responses will be addressed by December 22, 2023 and provided to all Bidders.

5. A pre-bid conference may be coordinated upon request.

6. On-Site visits to tour and review the facilities will be offered on November 13, 2023.

E. MODIFICATION AND WITHDRAWAL OF BIDS

A Bidder may modify or withdraw its bid by providing written notice to the District at the location designated in Section B.3 any time before the Submission Deadline. Such notice shall be in writing with the signature of the Bidder. Bids may also be modified or withdrawn by the Bidder, or an authorized representative provided such representative can prove identity and authority. Modified or withdrawn bids may be resubmitted up to the Submission Deadline.

F. BIDS TO REMAIN OPEN

All bids shall remain open and prices held for 90 days after the Submission Deadline, but the District may, in its sole discretion, release any bid prior to that date.

G. SUCCESSFUL BIDDER AND AWARD OF CONTRACT

1. The District reserves the right to reject any and all bids, to waive any informality, technicality or irregularity in any bid, to disregard all non-conforming, non-responsive, conditional or alternate bids; to require statements or evidence of Bidder's qualifications; to interview Bidders so as to determine successful Bidder; to negotiate contract terms with the successful Bidder, and to accept the bid that is, in the opinion of the District, in its best interest.

2. If the District awards a contract, the District will give the successful Bidder a **"Notice of Award"** within 90 days after the Submission Deadline.

BID FORM

TO: **Southshore Metropolitan District No. 2**
 c/o Cockrel Ela Glesne Greher & Ruhland, P.C.
 44 Cook St., Suite 620
 Denver, CO 80206
 Attention: David Greher
 dgreher@cegrlaw.com

THE UNDERSIGNED BIDDER, having familiarized itself with the work described in Exhibit A attached hereto and made a part hereof (the “**Work**”), in addition to all laws, regulations and other factors affecting performance of the Work, and having satisfied itself of the expense and difficulties related to the performance of the Work,

HEREBY PROPOSES and agrees that attached to this Bid Form as Exhibit B and made a part hereof is its bid for the terms and conditions, including compensation to be paid, for performance of the Work. If the Bidder’s bid is accepted, the Bidder agrees to enter into an agreement, of a form acceptable to the District (the “**Agreement**”), to perform the Work in accordance with the terms and conditions set forth in Exhibit B to this Bid Form, unless otherwise agreed in writing by the District, including the assumption of all obligations, duties, and responsibilities necessary to the successful completion of the Agreement. Bidder shall provide all services as provided in the Agreement and shall bill the District for same as provided in the Agreement.

BID REJECTION

In submitting this bid it is understood that the District reserves the right to reject any and all bids, to waive any informality, technicality or irregularity in any bid, to disregard all non-conforming, non-responsive, conditional or alternate bids, to negotiate contract terms with the successful Bidder, to require statements or evidence of Bidder’s qualifications and to accept the bid that in the opinion of the District is in its best interest. It is understood that this bid may not be withdrawn during a period of 90 days after the Submission Deadline. The District shall consider the skill and experience of the Bidder to perform the Work.

BID IS GENUINE

The undersigned hereby certifies (a) that this bid is genuine and is not made in the interest of, or in the behalf of, any undisclosed person, firm, or corporation, and is not submitted in conformity with any agreement or rules of any group, association, organization, or corporation; (b) that Bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid; (c) that Bidder has not solicited or induced any person, firm, or corporation to refrain from bidding; (d) that Bidder has not sought by collusion to obtain for itself any advantage over any other Bidder or over the District; and (d) that he or she is an authorized representative of the Bidder.

Date: _____, 2023

NAME OF BIDDER ENTITY:

Signature of Authorized Representative

Printed Name

Title

EXHIBIT A DESCRIPTION OF WORK

DISTRICT MANAGEMENT SERVICES

The Manger is responsible for overseeing a wide range of tasks. Below, we will take a closer look at each of these tasks and how they contribute to the overall management.

Community Management

- 1. Provide Expert Advice to the Board** - The role of a Manger is to advise the Board by providing them with information and recommendations based on their expertise and the governing documents.
- 2. Act as a Liaison** - The Manger will act as a point of contact between the Board and the community and keep the Board informed of any feedback or concerns from the public. A diligent Manger will respond to the public inquiries within one business day for phone calls and two business days for emails. The Manager is expected to respond to emergencies 24 hours/7 days a week.
- 3. Communicate Efficiently** - The Manager can answer questions and provide information. An effective Manager communicates with the community in a variety of ways, including:
 - a. **Newsletters:** Publish regular newsletters to keep the District informed about social events, projects, and important dates or deadlines. These newsletters will be email and posted on the community's website.
 - b. **Website:** Maintain the District's website where residents can find important information, documents, and forms related to the District.

The Manager need to establish clear and consistent communication with the District, as this helps to build trust and ensure that the public feel informed and engaged.

- 4. Vendor Management and Performance** - The Manager is responsible for monitoring the performance of vendors and contractors, not supervising them. Property owners should contact the Manager with any issues regarding vendors and contractors, who will forward the concerns to the Board for further action under the terms of the contract.

The Manager will also provide the Board with information on the condition of the community's common areas and buildings and recommend any necessary repairs or

maintenance. They will also coordinate with vendors and contractors to ensure that these tasks are completed promptly and cost-effectively.

5. **Offer Guidance on Community Issues** - The Manager will inform the Board of any issues or concerns, and guide how to address them. They may offer suggestions for policies or procedures to prevent similar problems from arising.
6. **Performs District Inspections** - Perform site inspections to ensure that the District property and common areas are properly maintained. The inspections may include checking the condition of buildings, landscaping, and amenities and ensuring proper maintenance.
7. **Provide Financial Management** - The Manager reviews the District's financials, including income, expenses, and reserves, and in conjunction with the District's accountants, provides regular reports to the Board. They will also make recommendations for budgeting and financial planning.
8. **Source Expert Opinions** - The Manager may offer opinions on various topics, but they should source expert opinions in a variety of situations, including:
 - a. Legal matters: If a legal issue arises the Manager should seek the advice of the District's attorney.
 - b. Financial matters: If the Manager is unsure how to handle a financial issue, such as creating a budget or investing reserve funds, they should consult the District's accountant.
 - c. Maintenance and repair issues: When dealing with complex maintenance or repair issues, such as issues with the District's infrastructure, or the destruction of common areas or building systems, the Manager should seek the advice of a qualified contractor or engineer.
 - d. Insurance matters: If the District is facing a claim or needs to renew or negotiate an insurance policy, the Manager should work with the Colorado Pooling and/or District's attorney.
 - e. Compliance with state and local laws: If the Manager is unsure how the Board should comply with state or local laws, they should seek the advice of the District's attorney.

Administrative Responsibilities:

The Manager will provide administrative services required for the cost effective and efficient operation of the District in accordance with the requirements of local, state and federal laws governing the operation including the following:

1. Attend Board and its committee meetings.
2. Preparing minutes of meetings in conjunction with the Board and committee Secretary.
3. Preparing agendas for meetings and provide meeting materials and financial reports at least four days prior to regularly scheduled meetings.
4. Providing status reports of all pending work orders as well as completed work order reports.
5. Preparing a monthly newsletter (with Board and committee input) and distribute to property owners.
6. Providing a 24/7 call center to assist or refer emergencies in the Common Areas and returning emergency calls within one hour of receipt.
7. Providing a website that allows property owners access the status of their account, make payments and submit service requests. Allowing members to link to management company's website via the District's website.
8. Providing recommendations for improvement of communication among and with the Board its committees and property owners including maintenance of the District's website.
9. Develop recommendations to improve administrative and operational efficiencies, and reduce associated costs.
10. Maintaining an up-to date electronic membership list (including Email addresses of all members who authorize the District to communicate with them via electronic means).
11. Coordinating and distributing Board and committee meeting notice and election information in accordance with current laws and assist with annual elections.
12. Monitor the status of the District's property, liability and worker's compensation insurance coverage.
13. Serve as the custodian of District records.
14. Financial Services. In conjunction with the District's accountants, the Manager provide financial services required for the operation of the District in accordance with the requirements of local, state, and federal laws and to ensure the financial stability including the following:
 - a. **Assessments:** Provide for the collection and deposit of all general and special assessments and any other charges/fees as they become due and payable or as otherwise directed by the Board.
 - b. **Electronic Payment:** Provide a method for members to pay dues and assessments electronically.

- c. Operating Funds:** Establish and maintain in federally insured financial institution trust accounts in the name of the District for the purpose of discharging liabilities and obligations incurred.
- d. Delinquent Accounts:** Provide for the collection of delinquent accounts.
- e. Disbursements:** Provide for the disbursements of funds for liabilities incurred in accordance with policy established by the Board. Specifically, the Board shall establish specific guidelines for the disbursement of funds requiring Board approval.
- f. Accounting & Financial Statements:** Provide and maintain financial and accounting records in accordance with generally accepted accounting principles (GAAP) as issued the Financial Accounting Standards Board.

15. Facilities Management

a. Operational Oversight

- i. **Daily Operations:** The Manager will be responsible for the day-to-day operation of the recreation centers and pools, ensuring they are open to the public during scheduled hours. Manager can either continue pool operations with the existing pool management company (Front Range Recreation Inc.) or source and onboard a new service provider.
- ii. **Scheduling:** Manage and coordinate facility schedules for fitness classes, social events, maintenance, and other activities.
- iii. **Safety and Security:** In coordination with the District's security services, the Manager will maintain a safe and secure environment which includes implementing security protocols, monitoring access, and emergency response planning.
- iv. **Compliance:** Ensure compliance with health, safety, and environmental regulations, including pool water quality and safety standards.

b. Maintenance and Repairs

- i. **Preventive Maintenance:** Develop and implement a preventive maintenance plan to ensure that equipment and facilities remain in good working condition.
- ii. **Repairs:** Address and rectify any equipment or facility issues promptly to minimize downtime.
- iii. **Grounds Management:** Oversee the maintenance of outdoor spaces, including landscaping, playgrounds, and parking lots.

c. Staff Management

- i. **Recruitment:** Hire and onboard Manager's staff, including lifeguards, fitness instructors, janitorial personnel, and event planning staff.
- ii. **Training:** Provide ongoing training and development opportunities to ensure that Manager's staff members are skilled, knowledgeable, and up to date with best practices.
- iii. **Scheduling:** Create and manage Manager's staff schedules, including part-time and seasonal staff, to ensure that all necessary roles are adequately staffed.

d. Budget Management

- i. **Budget Development:** Collaborate with the Board, Committees, District consultants and other service providers to create an annual budget for facilities management, accounting for all operational and maintenance costs.
- ii. **Expense Tracking:** Monitor and control expenses to ensure they align with the budget, making cost-effective decisions when necessary.
- iii. **Financial Reporting:** Provide regular financial reports to your organization, detailing budget performance and variances.

e. Vendor Management

- i. **Contracting:** Identify, contract, and manage third-party vendors or service providers for specialized maintenance, services and repair tasks.
- ii. **Negotiation:** Negotiate contracts and service agreements to secure the best terms and pricing for your organization
- iii. **Conflict of Interest:** Manager will not request or accepted any goods or services from a service provider as a condition to bid or offer services for the District.

16. Community Engagement

- a. **Feedback and Improvement:** Establish channels for community feedback and input to continuously improve the services offered.
- b. **Community Programs:** In close collaboration with the Board and its Committees, the Manager shall develop and implement community programs, events, and initiatives that align with the goals and the community's needs and interests.

17. Event Planning

- a. **Planning and Coordination:** In collaboration with the Board and its Committees, Manager will create a diverse and engaging portfolio of community events, including but not limited to holiday and special event celebrations, sports tournaments, fitness programs, cultural celebrations, educational activities, and other appropriate regular and recurring events for all age groups that promote community and activation of the community spaces. This may include regular meetings to gather input, share progress, and align goals.
- b. **Event Logistics:** Oversee the logistical aspects of event planning, including scheduling, vendor procurement, venue setup, safety protocols, and all necessary equipment or resources required for each event.
- c. **Marketing and Promotion:** Develop marketing strategies and materials to promote community events, including the use of various media channels and community outreach efforts.
- d. **Community Engagement:** Encourage the active involvement of community members in the planning and execution of events, fostering a sense of ownership and pride in community activities.
- e. **Budget Allocation:** Effective allocation of social event budget across all events throughout the year which may include the implementation of “pay to attend” and sponsorship opportunities.

18. Landscaping & Public Improvements. The Manager will be responsible for overseeing the landscape maintenance company. The landscape maintenance company will play a critical role in enhancing the aesthetics and functionality of the community.

- a. Solicit competitive bids for landscape maintenance project to ensure fiscal value.
 - i. **Request for Proposals (RFP):** The Manager shall initiate a separate RFP process for the selection of a qualified landscape maintenance company. This RFP should include the following:
 - 1. Please note, the existing contract for landscape services expire March 31, 2024 (this does not include snow removal services)
 - 2. The scope of landscape maintenance services required, including the specific areas to be covered.
 - 3. Qualification criteria for the landscape maintenance company, including experience, insurance, and references.

4. Evaluation criteria for the selection, emphasizing the company's track record and ability to meet the needs of the community.
 - ii. **Review and Selection:** The Manager will review and evaluate proposals received from landscape maintenance companies, and present the Board with a bid comparison and recommendation.
- b. Management of Third-Party Landscape Maintenance Company:
 - i. **Contracting:** Once a landscape maintenance company is selected, the Manager will be responsible for negotiating and executing a maintenance contract. The contract should include the scope of work, service levels, performance metrics, pricing, and terms and conditions, for approval by the District.
 - ii. **Performance Monitoring:** The Manager will actively monitor the performance of the landscape maintenance company to ensure that all maintenance tasks are carried out effectively and in accordance with the contract.
 - iii. **Quality Control:** The manager should establish quality control measures to assess the quality and consistency of the landscape maintenance services provided. This includes regular inspections and reporting.
 - iv. **Budget Allocation:** Allocate a portion of the overall budget for landscape maintenance services and manage expenditures in a manner consistent with the agreed-upon budget.
- c. Communication and Reporting:
 - i. **Reporting:** Provide regular reports to the District on the performance and status of the landscape maintenance services. This should include a summary of activities, issues, and any proposed improvements.
 - ii. **Communication:** Maintain open and effective communication channels with the landscape maintenance company, ensuring that any concerns or issues are promptly addressed.
- d. Compliance and Sustainability:
 - i. **Compliance:** Ensure that all landscaping complies with all relevant regulations, environmental standards, and safety requirements.
 - ii. **Sustainability:** Encourage sustainable and environmentally friendly practices in landscape maintenance, such as water conservation, eco-friendly products, and sustainable landscaping designs

e. Landscape Services

- i. **Annual Landscape Services** – Services will include but not be limited to seasonal lawn care; weeding and maintenance of native grasses, flowers, bushes and trees; weekly trash and debris clean-up
- ii. **Sprinkler Repair** – The District requires the landscape maintenance company to have a dedicated staff member onsite 7 days a week during watering season. The staff will primarily perform sprinkler repair and monitoring. If time permits, staff will assist in weeding and trash and debris clean-up.
- iii. **Snow Removal** – On a time and material basis, common area sidewalks, and both recreation centers and their respective parking lots require snow removal. Recently, the City of Aurora has authorized metro districts to maintain public roads within their boundaries. The District is actively researching this service.
 - a. **Pond Maintenance** – Routine maintenance of five (5) ponds and three (3) drainage channels. Services includes trash and debris removal, mowing, weed and algae control, inspect control, and minor repair work
 - b. **Irrigation Pumps** – Routine maintenance of irrigation pumps located in two (2) locations. Irrigation pumps operate during the growing season and additional pumps operate the Senac pond water feature year round

EXHIBIT B

I. BIDDER CONTACT INFORMATION

All communications and notices related to the bid should be directed to:

Bidder Name	
Attention	
Address	
Telephone No.	
Fax No.	
Email Address	

II. QUALIFICATIONS OF BIDDER

Insert or attach the following information:

1. Written evidence of Bidder's qualifications to perform the Work as set forth herein.
2. Evidence that Bidder has a practical knowledge of the particular Work bid upon, and that it has the financial resources to complete the proposed Work.
3. Comprehensive Narrative proposal containing the following elements:
 - a. **Introduction:** Provide an introduction to your firm, including its history, mission, and relevant experience in facilities management and event planning.
 - b. **Project Approach:** Detail your approach to managing our facilities, including staff management, maintenance strategies, and your approach to event planning.
 - c. **Case Studies:** Include at least three case studies showcasing your firm's successful management of community recreation centers, pools, public improvements, and event planning. These case studies should highlight key achievements, challenges, and innovations from similar projects.
 - d. **Landscape Management:** Submit a detailed strategy outlining how you will select, manage, and collaborate with a third-party landscape maintenance company. Include your approach to sustainable and environmentally responsible landscape management, please highlight your experience with unique community facilities (pump stations, reclaimed water, etc.)

- e. **Community Event Planning:** Present a sample event portfolio that demonstrates your firm's ability to create a diverse and engaging range of community events. Include descriptions, schedules, and promotional strategies for at least three hypothetical events. Detail your approach to collaborating with volunteer sub-committees, including strategies for forming, supporting, and coordinating their efforts in event planning. Provide examples of successful past collaborations with community volunteers.
4. Three references, including name, address, and phone number for other persons or entities for which the Bidder has performed services comparable to the Work.
5. The names and titles of all professional personnel who are presently on staff and will perform the Work, and for each such person, a resume describing relevant experience and recent projects similar to the Work and, if applicable, license and/or registration numbers. Please include information on the total number of clients supported and how many years the company and its principals have been providing the services requested.

III. COMPENSATION

Insert or attach the compensation to be paid for performance of the Work and related expenses, including any terms and conditions regarding payment for same. Preference will be given to fixed price proposals (with a menu of additional services) as this provides the most efficient method for budgeting purposes.

IV. QUESTIONNAIRE

State of formation and entity type

Number of years managing community associations

Names of principals and their personal certifications (e.g., PCAM, CCAM, etc.)

Certifications held (e.g., AAMC, ACMF, etc.)

Corporate/home office address

Locations of regional offices (if any)

Total number of employees in all offices

Total number of Metro Districts/Associations managed

Number of planned developments managed

Number of Metro Districts/Associations managed within Aurora

Revenues and unit count of the largest community currently managed

Revenues and unit count of the smallest community currently managed

Average revenues and unit count of communities currently managed

Name of parent company (if any)

Names of all affiliate companies (if any)

Resume of proposed property manager(s)

What is your overall management philosophy and approach to working with Metro District boards, owners, and residents/occupants?

What qualifications does your company require when interviewing potential employees?

Would the manager assigned to manage the Association hold a PCAM and/or a CCAM designation?

Does your company provide regular performance evaluations for its employees?

If so, please provide information about that process.

What type of training do you provide to the personnel who are responsible for servicing your company's clients?

What would be the chain of command between the personnel assigned to Southshore and the principals of your company?

Will a supervisor and/or upper management of your company ever attend Board meetings?

If so, how often and when?

What are your company's normal business hours?

What are your company's email and phone call response time policies with respect to board members, members/owners, and residents/occupants?

If applicable, distinguish the different response times for each category of the foregoing persons.

What would be the participation of the CM at a Board meeting?

Please provide a copy of a sample manager's report your company prepares.

Please provide a copy of sample board meeting minutes your company prepares.

Please provide a copy of a sample board packet your company prepares.

Please provide detailed information regarding your assessment collections process.

What delinquent assessment collection companies and/or attorneys does your company currently work with?

Please describe any pre-qualifying procedures your company has implemented for contractors, vendors, and service providers used by its association clients.

What methods do you use to identify opportunities for operational and maintenance improvements?

What process would you use to identify actual and/or potential violations of Southshore's governing documents?

When a maintenance issue is noted to the manager by the Board or by a member/owner, how would that request be handled?

How would your company verify that an invoice is appropriate for payment by Southshore?

Please describe any checks and balances procedures utilized by your company.

Please describe your company's experience in assisting its association clients with amending their CC&Rs and bylaws and adopting rules and regulations.

Do you currently employ an in-house IT staff?

If not, how do you regularly manage IT systems?

What is the most unique and innovative idea or program that you currently provide your clients?

What methods does your company use to assess and manage aesthetics and modernization of the communities that it manages?

Do you provide any informational/educational programs for your association clients' board of directors?

If so, please elaborate.

How does your company keep informed about new legislation and case law affecting communities?

Please describe the involvement of your company in any property management professional organizations.