



Association/District Name: _____

Director Name: _____

We want to continue to improve our services and want to focus our attention on what is most important to you!
Please take a moment to rate the following areas based on importance to you and the community.

- 1- of no importance
- 2- of little importance
- 3- fairly important
- 4- very important
- 5- extremely important

1 2 3 4 5

Technology

A community website that provides:

- 1.) Critical Board Documents (CCRS, HOA rules, etc.)
- 2.) HOA Meeting Minutes
- 3.) Online Dues Collection
- 4.) Online Amenity Reservations
- 5.) Resident Directories
- 6.) Local event guide
- 7.) Ability to sell advertising on the community site
- 8.) Live Chat feature for direct contact to you manager

Community Management

- 9.) Frequency of the property manager being on site
- 10.) Timeliness of receiving financial statements
- 11.) Timeliness of receiving meeting minutes
- 12.) Availability of payment options for dues
- 13.) Enforcing rules even-handedly and consistently
- 14.) Consistency in persuing delinquencies
- 15.) Partnering with real estate experts to pursue options such as HOA Foreclosure, or resident short sale assistance.
- 16.) Educating residents about rules (what they are and why they are implemented)
- 17.) Communication and timeliness of resident inquiries
- 18.) Timeliness of resolving open issues
- 19.) Routine property inspections to ensure a proactive management approach
- 20.) Handling community issues with minimal board involvement



1 2 3 4 5

Experience/Education

- 21.) Your manager has superior knowledge and experience managing cities, counties, municipalities and master-planned communities
- 22.) Your manager has an advanced degree (Masters in Public Administration, MBA, etc.)
- 23.) Your manager has a small portfolio of communities (<6) to maximize time spent on your needs
- 24.) Your manager attends seminars to learn about industry standards and best practices
- 25.) Promote initiatives to have board members attend seminars also
- 26.) Offer educational trainings to new board members

Open Questions

- 27.) What is the single most important criteria when selecting a management company?

- 28.) What is it that your management company does particularly well?

- 29.) In what areas do you feel your management company needs to improve?

- 30.) If a management company met all of your most important criteria, would you consider them the next time the board goes out for bids?

Best time to attend an HOA/CDD symposium

- September
- October
- November
- December

Top 3 Topics you are interested to learn about at the symposium

- New Accounting Laws
- Bond Payment Defaults
- Managing Community Delinquencies