

Villages of Valencia HOA

Management Company Proposals - Summary Chart

04/10/2023 revised 15 April

| | | Annual Budget | Coastal | Leland | Sovereign Jacobs | Vesta | Watson (Option 1&2) | NOTES |
|----|--|---------------|--|---|--|--|---|--|
| | | | | | | | \$55,200 | Option 1=8 hrs/wk |
| 1 | Cost for basic services | \$40,100 | \$69,000 | \$40,100 | \$46,080 | \$36,000 | \$46,200 | Option 2=6 hrs/wk |
| | * not coupon books, bulk copies, large mail-outs, postage for mailings | | inclusive * see services | plus extras | plus extras | plus extras | plus extras | see line 3 |
| 2 | Transition fee cost (data/web) | N/A | \$0 | N/A | \$3,840 | \$500/\$500 | \$500 | |
| 3 | Extra services at a cost | \$7,000 | SEE SCHEDULES INCLUDED WITH PROPOSALS | | | | | |
| | capital project admin fee | | ? pg 2-c2 ? | 5% | ?? | 5% | 10% | |
| 4 | # of board meetings included | | no limit | 4 + annual | 4 + annual | 12 + annual | 12 + annual | Coastal - no minutes |
| 5 | # of site visit inspections (min.) | | 2/month | 2/month | 2/month | 2/month | 2/month 1/wk | Option 2=6 hrs/wk Option 1=8 hrs/wk |
| 6 | Accounting services | | full | full | full | full | full | |
| | financial reports by the: | | 15th | 15th | 25th | 20th | ?? | |
| 7 | Collections | | full | full | full | full | full | |
| 8 | Communications Platform | | Appfolio | ?? | MGC | Vantage Pro* | Vantaca | *free virtual mtgs |
| | annual cost | | included | ?? | \$1,200 max < | \$1,500 | ?? | < contract - pg. 7 |
| 9 | Violations | | full | full | full | full | full | |
| | ARB Process | | | | | | | |
| 10 | Community Website | \$2,050/yr | included | \$2,050/yr | ?? | \$1,500/yr | \$800 + \$900 | |
| | | | see services | current | pg. 5 | pg. 13 | schedule A | |
| 11 | Proximity to VOV (miles/minutes) | | 11/15 | 20/21 | 9/13 | 20/22 | 3/5 | |
| | Local CAM ? | | yes | no | yes | maybe | yes | |
| 12 | Company experience (in years) | | 30 years | 29 years | 11 years | 25 years | 57 years | |
| | BBB accreditation rating | | A+ * | A+ | A+ * | A+ | A+ * | *not accredited |
| 13 | Interview Scale (1=high 5=low) | | K-1/V- | N/A | K-2/V- | K-1/V- | K-4/V- | |
| | Reference Check Professionals | | Florida Community Association Professionals Awarded 2018 thru 2020 | Florida Community Association Professionals 2023 10 th year as TOP DIAMOND Level | Florida Community Association Professionals 2023 4 th year as TOP DIAMOND Level | Florida Community Association Professionals 2023 6 th year as TOP DIAMOND Level | Florida Community Association Professionals 2023 1 st year as GOLD Level | |