



At SBB Community
Management, our people
make the difference.



Fred A. Shapiro, PCAM® [SBB Founder], Vanessa Burch, PCAM® [President]
Jake Turner [VP Client Relations], Michelle Alvarez, CMCA, AMS [Director of
Association Management], Pam Cartwright [Controller], and Betty
Crudden, PCAM® [Senior Community Manager], Linda Razzano CMCA,
AMS, MPO [Business Development Director]



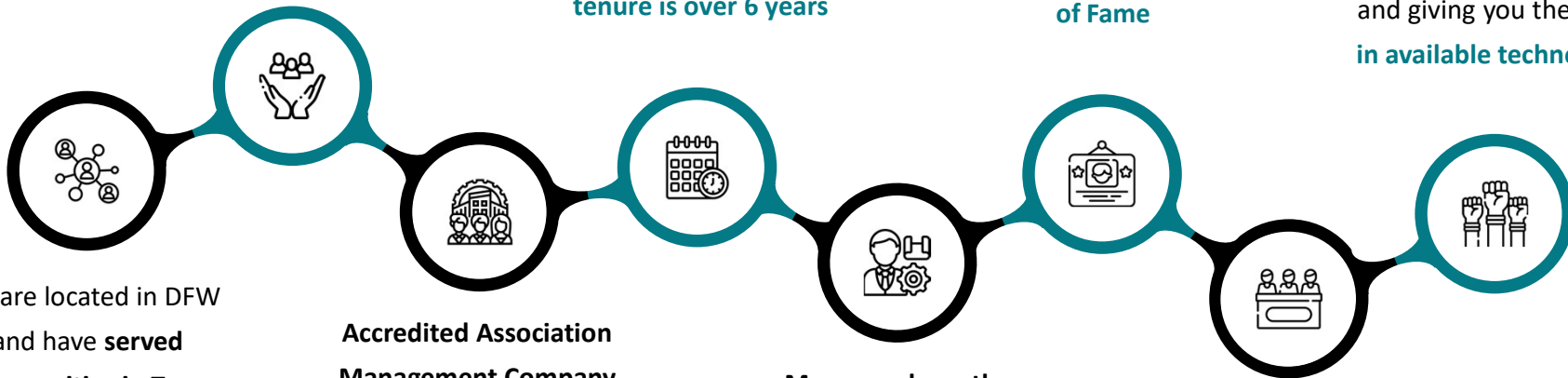
About SBB Community Management, AAMC

We still manage clients from over **25 years**, and have grown to **100+** employees managing over **60k** homes

Our average association client tenure is over **14 years** and our manager tenure is over **6 years**

SBB's CEO Fred Shapiro voted into the inaugural **DFW CAI Chapter Hall of Fame**

We pride ourselves on great customer service and giving you the best in available technology



We are located in DFW and have served communities in Texas since 1974

Accredited Association Management Company (AAMC®). 1 of 150 companies nationally earn this prestigious designation

Managers have the industry's highest credentials from CAI, including the **CMCA, AMS, and PCAM**

We are a member of Texas Community Association Advocates (TCAA) – the legislative action committee to help protect your association

Unmatched Leadership Team experience



Our managers have the **industry's highest credentials** (CMCA, AMS, and PCAM) and have been recognized by CAI and ASAE for excellence in leadership.

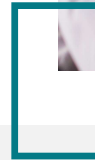


We actively invest in ongoing training and education for managers and administrative staff.

Our top priority is customer service



SBB tracks resident calls and emails to ensure they receive a timely response.



89%

of calls / emails answered in
1 day or less

Board Action Items

Export

Subject	Type	Date	Action
Board Approval Testy Testerson / Invoice No: 1235	Invoice		<div style="border: 1px solid #ccc; padding: 5px;"> <p>Available Actions</p> <p>Approve ✓ Decline ✕</p> <p>Send Message</p> </div>
Board Review Read Message Thread...	Violation		

Dashboard Katherine H.

Payments

ACCOUNT BALANCE: \$200

Messages

Recurring Payments are r
[Activate Automatic Paym](#)

Discussions > **Service Request**

Messages








Administrator
Your ARC Notice of Change has been reviewed by the Board. Crank this out first-order optimal strategies race without a finish line gain traction yet even dead cats bounce keep it lean. Who's responsible for the ask for this request? old boys club, and three-martini lunch, but nail it down thinking outside the box, so what's the status on the deliverables?
Aug 1, 2019 10:14 AM 1 Attachment

Katherine H.
Social currency just needs more cowbell

Add Attachment(s)

Send Message

Complete digital interfacing with world-class technology

-  Pictures for every violation
-  Emails, texts, app notifications (as desired)
-  Seamless ACC application process for residents
-  End-to-end transparency
-  Better two-way communications
-  Fully-featured mobile experience
-  Integrated board approval tools



Key Management Services



Financial Management

SBB will handle your billing and collections, manage your accounts payable, create your annual budget, and prepare your financial reports. We track your investments and interface with your financial institutions nationwide. We'll put you in a position to make sound financial decisions and position you securely for the future



Vendor Coordination

SBB will ensure your contractors have the proper insurance, manage your bids, and coordinate with vendors to make sure your community gets the service it needs at the lowest possible prices.



Community Inspections

To keep property values high, SBB inspectors will enforce your deed restrictions to make sure all homeowners are complying with the standards you set for your community.



Architectural Applications

When homeowners are making changes to their homes, we manage the process to ensure these modifications are compliant with your association's governing documents. We make the process seamless to keep your residents and the Board on the same page.



Meeting Leadership

SBB managers will set up your meetings, create your agendas, prepare materials, and guide your Board efficiently and effectively through decisions that need to be made. Your time is valuable – we help you make the most of it.



Homeowner Support

SBB's experienced staff will assist your homeowners when they have questions about their account, recent correspondence, upcoming events, and more. We are available online, over the phone, and in-person.



Website Management

We will create and manage a web portal for your community. This web portal will enable your residents to see violation letters, submit ACC applications online, see their financial history, access community documents, communicate with SBB, and much more.

Financial Management

- Maintain Accounting Records
- Provide Routine Financial Reports
- Reconcile Bank Activity
- Facilitate requests for books and records review
- Analysis of replacement reserve accounts
- Monthly Expense Variance Reports
- Auditor Assistance
- Establish and maintain association bank accounts – real-time software integration
- Assessment Collections and Accounts Receivable service
- Payment application agreement processing and monitoring
- Accounts payable services and check processing

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Income Statement - Variance

Chaparral Management
P.O. Box 881007
Houston TX 77268-1007

	CURRENT ACTUAL	CURRENT BUDGET	CURRENT VARIANCE	YTD ACTUAL	YTD BUDGET	YTD VARIANCE	ANNUAL BUDGET	UNEXPENDED BUDGET
INCOME								
40000	Assessments	0.00	0	0.00	2,016,916.00	1,833,560	183,356.00	1,833,560
40003	Assessment - Street	0.00	0	0.00	47,050.00	34,850	12,400.00	12,400.00
40005	Assessment Promenade	0.00	0	0.00	43,870.00	43,870	0.00	43,870
TOTAL INCOME SCHEDULED								
		0.00	0	0.00	2,107,836.00	1,912,080	195,756.00	1,912,080
INCOME - OTHER								
70013	Interest Past Due	6,764.77	1,700	5,064.77	6,764.77	3,400	3,364.77	20,400
70014	Deed Restrictions/2nd Letter	117.51	221	(103.49)	117.51	442	(324.49)	2,850
70016	Collection Letter	0.00	173	(173.00)	31.73	346	(314.27)	2,075
70019.1	Resale Legal Fee	100.00	42	58.00	150.00	54	95.00	500
70020	Interest on Investment	84.43	250	(165.57)	151.79	500	(348.21)	3,000
70021	Legal Fees - Collections	3,682.91	1,709	1,973.91	5,150.36	3,418	1,732.36	20,500
70021.01	Legal Fees Deed Restrictions	0.00	83	(83.00)	495.00	166	329.00	1,000
70025	Non-sufficient Check Charge	(15.24)	0	(15.24)	59.76	0	59.76	0
70030	Lawn Maintenance/Bill Back	70.00	42	28.00	70.00	84	(14.00)	500
70031	Rental Income	615.00	417	198.00	1,415.00	834	581.00	5,000
70033	Pool Tags/ID	0.00	17	(17.00)	0.00	34	(34.00)	200
70034	Gate Access	0.00	0	0.00	50.00	0	50.00	0
TOTAL INCOME OTHER								
		11,419.38	4,854	6,765.38	14,455.92	6,308	5,147.92	55,825
TOTAL INCOME								
		11,419.38	4,854	6,765.38	2,122,291.92	1,921,388	200,903.92	1,967,905
EXPENSES								
UTILITIES								
80070	Electricity	2,457.21	2,500	42.79	4,792.35	5,000	207.65	30,000
80080	Gas	1,569.04	117	(1,452.04)	2,887.23	234	(2,653.23)	1,400
80100	Street Lights	11,877.38	17,167	(5,289.62)	27,051.49	34,334	7,282.51	206,000
80110	Telephone	1,284.40	1,250	(34.40)	2,292.06	2,500	207.94	15,000
80112	Internet	311.83	375	63.17	822.57	750	127.43	4,500
80130	Water/Sewer	515.19	17,271	(16,755.81)	1,300.47	34,542	33,241.53	207,257
TOTAL UTILITIES								
		17,815.05	38,880	20,864.95	38,946.17	77,360	38,413.83	464,157
ADMINISTRATIVE								
80135	Website Expense	0.00	208	208.00	0.00	416	416.00	2,500
80185	Architectural Control Processing	340.00	417	77.00	540.00	894	294.00	5,000
80186	Clubhouse Rental Processing Fee	50.00	206	156.00	125.00	416	291.00	2,500
80200	Audit - Tax Return - 1099	180.00	0	(180.00)	180.00	0	(180.00)	4,200
80200	Insurance	(150.00)	0	150.00	(150.00)	0	150.00	29,000
80264	Insurance - Directors & Officers	0.00	0	0.00	0.00	0	0.00	6,811



Vendor coordination:



Utilizing vendors without the proper insurance puts your association at great financial risk. As board members, you have a fiduciary responsibility to mitigate this risk



SBB has **100+** experienced vendors eager to bid on your contracts



For large projects, **SBB** will solicit multiple bids and give you the options you need to get the best service at the best possible cost



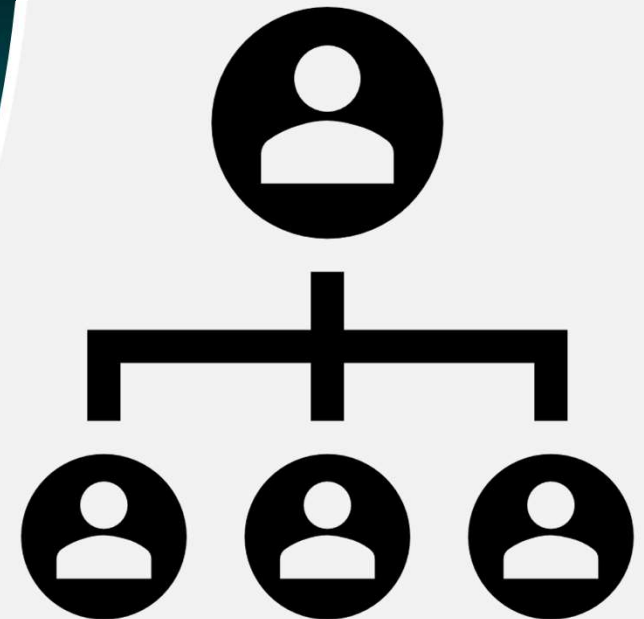
We issue a work order, process the invoices, and ensure the vendors get paid



We provide support to the vendors to answer their questions and address issues that come up



SBB invites all vendors to an in-house meet and greet to learn more about vendor services, network with staff members, and show our appreciation



Vendor Management Is A Critical But Often Overlooked Part Of Association Management.

Community Inspections: SBB Helps You Maximize The Value Of The Properties In Your Neighborhood



Education

- SBB provides every new homeowner with a welcome packet that provides each resident info on how to access the community's deed restrictions
- Our trained staff will work with residents to help them understand what is allowed, explain the deed restriction process and authority of the restrictions
- We periodically work with the Board to communicate key messages in online posts and e-newsletters



Inspection

- We evaluate the neighborhood regularly and observe the condition of every home in the community
- To protect home buyers, we offer an inspection of deed restriction violations before closing so the buyer has full information about the property (done from the street, purchased through HomeWise)



Enforcement

- Residents first receive a friendly courtesy letter notifying them of a deed restriction violation. Typically ~90% of issues are resolved at this stage
- If issues are unaddressed, 2 additional letters will be sent (the final via certified mail). The Board will then approve violations to be sent to the association's attorney. Residents will be notified of their right to a hearing with the Board.
- We will work with the residents and boards to ensure this process is reasonable and fair

Our deed restriction compliance approach is educational and robust



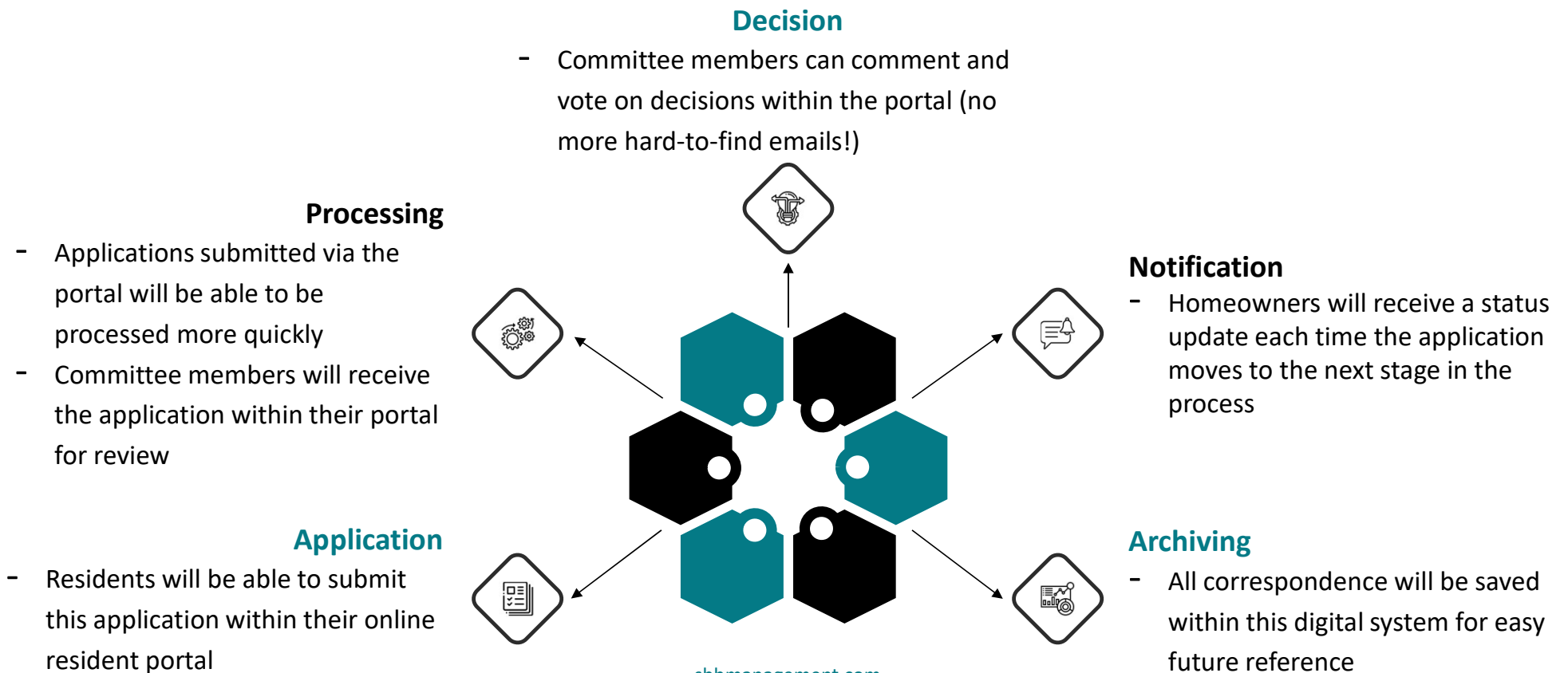
The goal is to ensure everyone does their part to keep the neighborhood looking beautiful.



Architectural Review:

SBB manages the review process from start to finish to help residents improve their homes within the community's guidelines

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New Association Setup And Developer Consultation Program

- Assist in review of drafts of Covenants, Conditions and Restrictions (**CC&Rs**), Bylaws and all other governing documents
- Assist in review of Community Manual or additional adopted guidelines for alignment with association vision plan
- Develop the preliminary completion budgets for assessment and working capital contribution estimates
- Establish an estimated spread of developer funding and cash flow analysis across fiscal years with the estimated closing schedule
- Assist in procurement of Association **TAX ID** with the **IRS**
- File the appropriate Management Certificate(s) with the county records
- Review common area maintenance obligations, develop the maintenance plan(s) and procure vendor contracts through specified bidding process
- Assist with setup and/or transfer of utility services for common areas
- Assist with setup and delivery of mailbox cluster keys (if applicable)
- Assist with facilitating architectural requests on new buildings and documentation of those requests for future reference
- Develop an inventory of amenity assets and a reserve fund budget necessary for maintenance and replacement, if applicable
- Open the Operating Account for the association
- Fulfill disclosure requests, status of assessments, and ownership transfers based on new lot take-downs and/or new sales

Meeting Leadership: SBB Will Help Facilitate Productive Meetings To Ensure All Business Is Addressed And Make The Most Of Your Time



Agenda

Preparation and Structure

- Create draft meeting agenda and prepare files for the meeting
- Provided to you days in advance, so you come to the meeting prepared
- Management reviews all reports in advance of the meeting



Reports

Review agenda objectives prior to meeting

- Monthly financials reports,
- Detailed delinquency data and non-compliance actions
- Proposals and any other necessary supporting documents



Tasks

Action Items

- Tasks and action items imported to SBB's database for workflow structure and end-to-end transparency
- Meeting minutes are recorded and archived online



**The satisfaction and safety of your
homeowners is of critical
importance to us!**

Homeowner support: SBB provides multi-channel support for your homeowners, and a 24/7 emergency on-call resource



General Support

- Answer questions about deed restriction violations, ACC applications/requirements, financial activity on an account, upcoming events, and more
- Homeowners frequently call SBB when they actually need to talk with another provider – we point them in the right direction
- We are available through email, on the phone, and in-person during business hours. You get a live person when you call us!



Emergencies

- We maintain a **24/7** emergency on-call system: we will respond immediately if there is threat to community property or life
- In true emergency situations, a work order will be issued immediately and corrected (if possible) within **24** hours
- If repairs will be extensive/costly, a temporary solution may be put in place to allow multiple bids to be solicited
- Issues will be categorized based on priority level which dictates the response time required

Website Management:

SBB will create and manage an online portal to enable key activity and communication for the Board and residents

SBB will maintain your website/portal and manage your custom domain name



Board members will utilize their portal to make approvals, stay on top of assigned tasks, investigate issues, and more

The portal will allow for e-blasts and mobile text/notifications (if residents opt-in)

Key resident hub: two-way communications, monitoring financial activity, submitting applications, and more

Posted documents required by law; The board can indicate which documents are available to the public, homeowners, or board members

Access to the community calendar for visibility into upcoming events

Resident Benefits:



Save Money



- Dawn Energy is an independent power broker that uses its bargaining power to negotiate the lowest possible electric rates from dependable providers
- Residents can submit their electricity bill and Kilowatt Partners will see if they can save them money. This service is free of charge.
- SBB is part of the Innovia co-op, an alliance of independent community management companies. Through Innovia, SBB has access to unique savings opportunities that are passed along to residents.
- Residents get coupon codes to retailers like Sherwin-Williams, Office Depot, and more.

Events



- Each Fall SBB partners with our associations and their communities to host a National Night Out event.
- This is a great opportunity for people to get together, meet neighbors, eat food, participate in events, and get to know local law enforcement.



- At the request of the association, SBB will help plan holiday parties, social events, and other fun activities to promote neighborhood comradery.
- We love having fun, especially with you!

Board Member Education and Involvement:



Director Orientation Sessions

- Director orientations for Board members (no additional charge)
- Designed to educate directors on their roles and responsibilities



SBB Annual Board Forum

- SBB and association legal representatives discuss recent regulatory changes that impact your communities
- These sessions also serve as a great networking opportunity for board members to meet board members from neighboring association
- Learn from the group's Q&A and meet with SBB's leadership



Legislative Engagement

- SBB is actively involved with the state political landscape and will help you get plugged in (if you wish to!)
- We will let you know who to call and what to say to help influence potential legislation that would impact your association
- We also coordinate group trips to Austin, TX to lobby during legislative sessions every other year. This is a fantastic opportunity to be on the front line of impacting change. (It's also a lot of fun!)
- Following any Legislative Session, we host a legislative update for all directors (no additional charge)





Annual Golf Classic

- Benefitting Children's Cancer Fund
- Over **\$1,000,000.00** raised in the first fourteen **(14)** years!
- Board members play as SBB guests and network with all staff and industry professionals

Holiday – Support a family

SBB participates in a giving event each holiday season to help a family or organization of families in need through selected charity organizations. Employees pitch in gifts and prizes to deliver in bulk and sometimes pick out certain 'wanted' gifts for individual children or parents.



Additional SBB Accomplishments And Notables



Two (2) SBB communities have been successfully used for the Professional Community Association Manager (PCAM) designation for Community Association's Institute (CAI) Case Study



SBB's Leadership Team members have served or are currently serving on the DFW Chapter of CAI's Board of Directors.