

From: Mark Walther <mark@robotmark.com>
Sent: Sunday, April 25, 2021 7:24 PM
To: rayna@otishoa.com
Cc: 'Scott Otis'; 'Josh Kersten'
Subject: Re: Laurelmont Board Meeting

Flag Status: Flagged

Hello Rayna,

I looking at the minutes of the RECONVENED 2020 ANNUAL MEETING OF THE MEMBERSHIP February 4, 2021 included in 4-27-21 LMCA Packet Pt 1.pdf, I noticed that the RESULTS OF ELECTION were incomplete and incorrect.

Below is the accurate, complete, and correct voting result:

Board Member	Votes	Year term
Patrick Whitfield	112	2 year
Mark Walther	107	2 year
Jessica Sandacz	39	2 year
Tom James	38	1 year
Desmond Kasavan	24	1 year

These results can be verified by Sarah Strain or by reviewing the voting package.

Not sure how you want to update and correct the results.

Regards,

Mark

On 4/22/2021 5:40 PM, rayna@otishoa.com wrote:

rayna@otishoa.com has invited you to Laurelmont Board Meeting

Title: Laurelmont Board Meeting
Location: <https://us02web.zoom.us/j/3311596073?pwd=cINzVWNqQVhDcUlvWGdtVHFtL3M2Zz09>
When: Tuesday, April 27, 2021 6:00 PM – 9:00 PM
Organizer: rayna@otishoa.com <rayna@otishoa.com>

Description: Good afternoon, Please see the attached Board Packet part 1 and 2 for the meeting on Tuesday, April 27th at 6:00pm. Attached are the Harvest Landscape contract and the square footage prepared by Brian Kalmenson. There is also a proposal from Aquatrends to install chemical controllers. My apologies that these did not make it in the Board Packets. Please have the Board Packets and all of the supplemental material prepared for the meeting. Please see the zoom link below. Join Zoom Meeting

josh@otishoa.com

From: Arellano, Juan <Juan.Arellano@aus.com>
Sent: Friday, April 23, 2021 10:21 AM
To: josh@otishoa.com
Cc: rayna@otishoa.com
Subject: FW: Laurelmont HOA

Hey Josh please see below, we will have to respectfully decline as we can't provide the scope of work required.

Respectfully,

Juan Arellano
Operations Manager

Allied Universal Security Services
765 The City Drive South | Suite # 150 | Orange, CA 92868
W: 657.233.8311 | C: 714.438.9899 | Juan.Arellano@aus.com
www.AUS.com | PPO# 14417



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From: Nsaif, Steve <Steve.Nsaif@aus.com>
Sent: Thursday, April 22, 2021 5:03 PM
To: Arellano, Juan <Juan.Arellano@aus.com>
Subject: RE: Laurelmont HOA

Juan,

I've reviewed the scope for this community and determined that our current patrol operation will not be able to accommodate this scope. Especially the main issues with parking and parking enforcement. Our patrol is structured to conduct quick 10-15 minutes per stop to deter any vandalism, quick checks on lights, etc. It will not be successful in addressing the need, therefore I would respectfully decline knowing that we will not be successful addressing the need.

Thanks.

Steve Nsaif
General Manager

Courtesy Patrol Partnership Proposal



LAURELMONT

Aliso Viejo, California



Courtesy Patrol Specialists

Southern California's Patrol and Guard Service Specialists

Courtesy Patrol Partnership Proposal

April 23, 2021

Laurelmont Homeowners Association
c/o otisHOA Management
Josh Kersten, Community Manager
23120 Alicia Parkway, Suite 21
Mission Viejo, CA 92692

Re: Laurelmont and Courtesy Patrol Proposal

Dear Josh,

Thank you for the opportunity to provide you with this information. We consider it an honor to provide information to your association regarding our courtesy patrol and guard services. Our goal is to provide you with the highest level of security services you deserve. We offer both vehicle patrol as well as standing guard services. We only employ officers who have been proven security professionals because of their commitment to training and customer relations. These are officers that will perform their duties to the highest level and protect the best interests of this community and its residents.

I am hopeful that we will be able to prove ourselves worthy of an additional invitation to bid on further services.

As part of our services, our management team will collaborate with you and your staff to continually develop comprehensive post orders for the courtesy patrol officers assigned to serve your clients. Additionally, Courtesy Patrol Specialists, Inc. will establish Account Management protocols to ensure post orders are current and those duties are performed daily, as well as the supervisory and managerial inspections of the officers assigned to fulfill those duties.

Mission Statement

- Our commitment to our clients is to provide a quality courtesy patrol service; to help maintain the quality of living as set forth by the CC&R's and guidelines of your community. We strive to provide courteous and honest enforcement as directed by your community leaders and management staff.
- We will always be honest and truthful in all our dealings with every client and employee of CPS. Our long-term focus is to provide professionalism, quality, and customer satisfaction.

We are proud to offer our service to any of the types of categories listed below:

- Commercial
- Residential
- Municipal/Government
- Hotels/Hospitality Venues



Courtesy Patrol Specialists

Southern California's Patrol and Guard Service Specialists

Company Background/Executive Resume

Courtesy Patrol Specialists, Inc. was founded to restore the fundamentals of what all security companies and their officers should be striving to accomplish: Prevention - prevent the action(s) of violators by remaining highly visible when on property; Alertness; Listening; and most importantly, understanding conflict resolution. When these four main areas are the focus of the officers patrolling your properties, all of the other duties that are required of security officers by law and any additional duties that will be assigned are simplified. In return, customer satisfaction is likely to occur even when enforcement actions are required.

Courtesy Patrol Specialists, Inc. was founded by the Owner and President Doug Kantner. After working over 25 years in the security industry, mainly at two of the largest patrol companies in Southern California, he finally decided to open up a security firm built on integrity, both within the organization and from the officers we employ. Our loyalty to both our clients and employees, as well as our dedication to the clients we serve is the key to our long-lasting relationships. Doug's understanding of both patrol and guard operations as well as law enforcement in general, has been encapsulated in our philosophy and is the core of all of training and expectations of our staff.

Our Courtesy Patrol Program

Our Courtesy Patrol service is an increasingly popular choice for organizations of all types. Regular vehicular type patrols are effective at deterring crime while remaining easy on your budget. Vehicular type patrols are conducted by our well-trained patrol officers who randomly, but regularly, visit and inspect your premises throughout the evening and early morning hours. Daytime inspections are also available. These inspections may include but are not limited to checking all windows and doors, arming and disarming alarms, removing loiterers, locking up buildings and facilities, looking for and discouraging any signs of wrongdoing, and the timely reporting of any safety and/or maintenance related issues that we may find.

Most patrols are requested by the clients to be performed during the vulnerable hours of 10pm - 6am. Additionally, we offer specialized solutions to suit all of your patrol needs. Courtesy Patrol Specialists employs a fleet of marked patrol vehicles staffed by specially trained Patrol Officers.

Sample Vehicle Below





Courtesy Patrol Specialists

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Our courtesy patrol services are designed to meet our individual client's requirements. It offers an affordable and effective alternative to a full-time security presence. We can provide a quality courtesy patrol service to meet the ever-changing requirements of today's clients and will gladly do it with a smile. This service is provided at a competitive price and although it may not be the least expensive available, our services are the best on the market.

Parking Enforcement/Enhancements

We are happy to enforce or create a solid parking enforcement plan with reasonable enforcement and expectations that both the community and property management staff understand and will embrace. We will help design a program that enforces your current parking restrictions with fairness and professionalism. The enforcement officers are to be courteous and, in all cases, where available, will educate all residents, tenants and guests on the parking rules for each property. Many associations and communities refer to impounding vehicles as a last resort. In many cases, this is the only way to ensure compliance is achieved. If impounding a vehicle is required, the towing agencies that we will be using on your properties are independent of Courtesy Patrol Specialists and are licensed and authorized by the State of California to perform such duties.

Our professionally designed database was created for residents and guests alike. After listening to many complaints from residents who used other vendor's websites for safelisting vehicles in their properties, we created a safelisting system second to none. Our system will email you the confirmation number for your records when you have completed the safelisting process. Additionally, we have developed a mobile version of our website so safelisting can occur easily from your smart phone while you are in your vehicle. The system is user friendly and we encourage online safelisting for better accuracy.

If you are unfamiliar with the safelisting program, below is a brief description for your reference.

A safelist/variance is a short-term parking exemption. It allows for vehicles to park within properly marked spaces inside of associations and communities that Courtesy Patrol Specialists may patrol and conduct parking enforcement. This is similar to a guest pass system; however, these passes are limited to your vehicle only and cannot be transferred. Additionally, they are also created electronically.

The safelisting system is an effective method used by hundreds of associations/communities throughout Southern California. The rules on safelisting vary from association to association. In most cases, a safelist requested for one overnight stay is valid for 24 hours from the time of the safelisting request. Typically, there are limits to the number of safelists any one vehicle or residence can use. These limitations are normally set forth by the Board of Directors prior to our enforcement of such rules commencing.

Permit Programs

A simple parking pass program can fix many problems. Incorporating these types of programs can increase property values and more.

Homeowners Association parking permits and decals not only show who has legitimate rights to park within the property, it can help build a sense of community and pride within the neighborhood. Parking permits are the best way to organize your parking areas while ensuring that your neighborhood parking is streamlined, clean and attractive. Any homeowner's association or community can benefit from a specialized parking permit program.



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Courtesy Patrol Specialists provides parking enforcement permit program services for a variety of communities. Our parking management program will simplify your current parking program and allow you the freedom to do other equally important things required to manage your property. We will manage and administer your parking permit and enforcement program for you. Included in our parking permit and enforcement program, we provide the following services:

- Provide Online parking permit registration for tenants and homeowners.
- Evaluate and make recommendations to resolve the gray areas of enforcement.
- Remove violating vehicles, per California Vehicle Code regulations therefore increasing parking spaces for authorized vehicles to use.
- Track and monitor all violations using the vehicle license plate.
- Register all vehicles that will be parking outside of their garages /carports on your property.
- Issue all required parking permits (annually if required).
- Enforce all association and community parking rules and regulations.
- Create satisfied residents.

We do not charge a set-up fee for new clients. We can easily transfer and assume your preexisting permit program information until the next renewal date.

Garage inspections are performed at a cost of \$50.00 per inspection. We can either charge the resident or the community based on the program you have in place or decide to create.

Courtesy Patrol Specialists uses a parking application created just for our software. The officers have real time information and tracking using the latest smart phone technology. Our Courtesy Patrol officers will monitor all parking areas and check the status of any vehicle on your property for properly displayed and valid permits. All violations are documented and recorded into our database for tracking purposes.

Our management team has decades of experience in the creation and enforcement policies of these types of programs.

Officer Experience, Computer Skills, Ongoing Training Programs

All of our officers have undergone a thorough background investigation conducted by the Department of Justice and are licensed security guards by the State of California Bureau of Security and Investigative Services, (BSIS). We also conduct our own internal investigation of each applicants work history, reliability, character and ability to perform. All officers must pass an oral test conducted by the owner and are trained and oriented in our policies and procedures. We provide continual training as well as classroom type instruction using the State of California's training curriculum for security professionals. Officers assigned to posts requiring the use of computers are trained specifically for that program and the responsibilities of the post as it relates to that program.

Service Standards for Laurelmont Homeowners Association

When we are providing our service to you, our officers will be guided by these four key principles that will allow us to meet or exceed your expectations at Laurelmont Homeowners Association.

Professionalism: We will always conduct ourselves in a professional manner that reflects positively on your residents, guest, your association management employees, board members and our company.



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Excellence: We believe in excellence in everything that we do. From responsiveness to your request, direct communication, proficiency in assigned duties, we are dedicated to providing an excellent all-around service.

Accountability: We take every security related function we perform seriously, and accountability is a major point of focus in our operation. We will remain accountable to you (the Board) and your property management company; we guarantee services will be executed timely and in a consistent professional manner.

Value: We understand that you must make a financial investment in our service with confidence. We will always strive to provide you with the most valuable service that comes with as little financial risk to you as possible.

Service Standards for Assigned Courtesy Patrol Officers:

- a) **Minimum Age** - be at least 21 years of age.
- b) **Background**- No felony criminal convictions.
- c) **Communication**- Have excellent verbal communication skills.
- d) **Driver's License** - Guards will possess and carry in their possession while on duty a valid California Driver's License issued by the CA Department of Motor Vehicles.
- e) **Education** - Guards will possess a high school diploma or G.E.D. equivalent and must have the ability to fluently speak, read, and write the English language, understand and carry out oral and written directions, think and act quickly and effectively in emergencies, write accurate and clear reports if required.
- f) **Experience** - Guards assigned to work under this Contract will have had prior security guard experience of a relevant nature.
- g) **Guard Registration Card** - Guards will at all times, be in possession of a current guard registration card issued by the California Department of Consumer Affairs while assigned to the community.

Management / Supervision

The Courtesy Patrol Specialists Team has over 35 years of combined law enforcement, security and customer service experience. At every level, our staff has been encouraged and given the authority to make the necessary decisions to ensure the satisfaction of our clients is achieved. The president of Courtesy Patrol Specialists, Mr. Doug Kantner oversees all day-to-day aspects of the company's growing client list in Southern California. He directly supervises all operations, account management, marketing, and employee training. In addition to the support, you will receive from the Owner and staff members, all Courtesy Patrol Specialists officers are monitored by Field Supervisors. This is to ensure they are delivering the specialized service our clients expect and deserve. Our supervisors perform inspections on a random basis to ensure our Officers are performing their duties in accordance with the contract and post orders for your property. During these visits' supervisors will conduct on-going training and will follow-up to any complaints we may have received and will rectify such issues ensuring they do not repeat themselves.

Communication Protocols

Residents and tenants are encouraged to call our 24-hour Dispatch Communications Center to report issues related to noisy neighbors and/or suspicious activity, including after hour's activities in the recreation areas. We are happy to respond to these types of calls for service free of charge provided we are under contract with the community as their Courtesy Patrol Company.

Officers are issued the newest technology advanced smart phones. We have discovered tremendous advantages by the officer having the ability to make and receive phone calls and take quality pictures of any issues for better documentation and follow-up. Additionally, the officers can also conduct parking enforcement on foot because all of the equipment they need is in the palm of their hand. Status checks



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of the officers and their whereabouts are conducted by the on-duty supervisor at random intervals throughout the shift. All officers are required to report on and off duty with our communications center as well.

Officer Performance Review Process

All officers are continually evaluated on their skills and abilities, customer service and job performance. Courtesy Patrol Specialists has created a merit system to evaluate our officers on various performance areas such as customer service, professionalism, appearance, complaints received, etc. Officers are formally evaluated on a semi-annual basis coinciding with their hire date. Our management staff is available to discuss any issues you may have with a particular officer and a re-assignment if warranted.

Emergency and Contingency Protocol

In the event of an emergency, our officers are trained to make the necessary notifications, such as police, fire or paramedics, depending upon the nature of the emergency. Officers are trained to assist emergency personnel if requested. They are instructed to document the activity for management notification and are required to notify the on-duty supervisor of any incident otherwise. Copies of the incident reports are to be provided to you the client electronically within 24 hours.

Insurances and State Licensing

Courtesy Patrol Specialists, Inc. is **always** current with our General Liability, Workman's Compensation and Automotive insurance policies. Our policy limits meet or exceed the industry standard. Our insurance policies will gladly be provided for you are your request.

We are fully licensed by the State of California to perform security patrol and guard duties. Our owner and President is also licensed by the state as our qualified manager. Doug Kantner is responsible for the training and due diligence to ensure all private patrol operations, security guard regulations and policies mandated by the State are followed and complied by Courtesy Patrol Specialists.

Please note: Courtesy Patrol Specialists, Inc. is fully compliant with:

- SB198 (Health and Safety Program)
- SB179 (California Labor Code 2810)
- AB2880 (Security Officer Training)



Courtesy Patrol Specialists

Southern California's Patrol and Guard Service Specialists

In closing, we want you to remember that we named the company Courtesy Patrol Specialists because we believe that the word "security" offers a false sense of protection to your residents and tenants. Often times it adds unnecessary legal inquiries to the community. Due to the misconception, our courtesy patrols offer and allow a way for the community to have a contracted courteous type of service that performs various assignments and duties for the community. Lastly and most importantly, we wanted to put the word "courtesy" back into positive enforcement.

Thank you for your review of this proposal, we look forward to providing you with excellent service.

Sincerely,

Lindsay Stein
Assistant Vice President
Courtesy Patrol Specialists, Inc.
17731 Irvine Blvd, Suite 116
Tustin, CA 92780



Courtesy Patrol Specialists

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Option 1

Service Description:

One Foot and Vehicle Patrol inspection, seven days per week between 10:00pm and 6:00am, at random.

Cost Per Inspection: \$14.00

Total Monthly Costs: \$426.00

Option 2

Service Description:

Two Foot and Vehicle Patrol inspections, seven days per week between 10:00pm and 6:00am, at random.

Cost Per Inspection: \$14.00

Total Monthly Costs: \$851.00

Here is a list of the duties we would perform but are not limited to:

1. Conduct parking enforcement for the areas of concern as outlined in the client orders.
2. Check any common areas/recreational area(s) in a timely manner in accordance to the hours of operation.
3. Respond to disturbances/suspicious activity and complete follow up of such activities.
4. Ensure parking compliance problems are addressed and citations are issued accordingly.
5. Electronically report all activities and maintenance issues for faster notification
6. Patrol the street and parking areas routinely to discourage vandalism and theft.
7. Replace all required towing signage at the entrances at no cost to the association.

Option 3

Service Description:

Permit Program issuance and administration/database tracking.

The cost to manage each permit is \$1.00 per unit, per month

Here is a list of the duties we would perform but are not limited to:

1. Conduct parking enforcement for the areas of concern as outlined in the client orders.
2. Ensure parking compliance problems are addressed and citations are issued accordingly.
3. Administer permits if requested by management.
4. Provide permits to management (specific color upon request).



Courtesy Patrol Specialists

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Courtesy Patrols Specialists, Inc. invoices our regular patrol type services monthly. We have calculated the number of inspections proposed at the time of this proposal plus your inspection rate and multiplied that by 30.4 to determine the average monthly amount you would be paying for security services. As we are aware, some months have 31 days and only February has less than 30. We believe this formula is fair for the client and us. Please let us know if you have any concerns about this billing philosophy prior to the start of service.

Due to our monthly billing cycle, the cost may seem higher. However, unlike the other security providers, who bill every 28 days, you will have only 12 billing periods, not 13. The cost savings for the community on average is \$250.00 per year by selecting our services over the competition.

Our contracts are month to month with a standard 30 days termination clause, as we want you, (The Client) to be satisfied with our services. We are committed to your long-term satisfaction with the services we are providing to your community.

We believe in being transparent in all of our services. We hope or explanation of our pricing structure is helpful, and we would be happy to answer any questions that you may have about such.

Please sign on the signature space provided below if you have accepted this proposal and pricing structure as listed. At your request, we will gladly follow-up with a formal contract as well.

On behalf of the board/management we accept the outline of this proposal and will advise Courtesy Patrol Specialists, Inc. with a future start date for the services requested.

For CLIENT: Laurelmont Homeowners Association

Signature

Print Name

Title

Date: _____



Courtesy Patrol Specialists

Southern California's Patrol and Guard Service Specialists

OUR AFFILIATIONS



Infragard of Los Angeles- Criminal and Terrorism awareness updates and training

Private security terrorism response group – Shield (County of Orange)

Orange County Private Sector Terrorism Response Group (PSTRG): The PSTRG was formed in December 2001 to create a private sector partnership with the TEWG to effectively address private sector safety, incident management, employee education and public health consequences of potential attacks on the critical infrastructure within Orange County. Two large groups involved with PSTRG are the Orange County Business Council, of which 80% of the major businesses in Orange County are members, and Technet, a consortium of 28 high tech firms. The objectives of the PSTRG include physical resource sharing, information exchange, virtual reach-back capabilities, and subject/industry matter expert's cross-utilization. The PSTRG is an instrument which allows the Sheriff's Department to maximize all resources and prepare community members for the potential of terrorism and recovery in its aftermath.

Irvine Police Department Private Security Partnership (PSP)

A police and private security partnership was formed to enhance the training, knowledge and communication amongst all participating parties regarding the security and safety of Irvine commercial and residential offices and facilities. The program is supported by the Irvine Police Department and participation is encouraged for security directors and property managers throughout the community. Bi-monthly meetings will be conducted that will feature guest speakers, security training and information addressing the latest information relating to crime trends, terrorist updates and safety tips for the Irvine community's commercial/residential buildings and facilities. Additionally, since 2015, our company president Doug Kantner also serves on the committee for advisement for the PSP to the Police Department.

National Council of Investigation & Security Services (NCISS)

The National Council of Investigation and Security Services, Inc. is a cooperative effort of those companies and associations responsible for providing private security and investigation services to the legal profession, business community, government and the public.

Business Emergency Response Team (B.E.R.T)

The purpose of BERT International, Inc. (Business Emergency Response Training) is to provide businesses with the necessary knowledge, expertise and tools to prepare for, respond to, and recover from systemic emergency incidents which would task the First Responder system. This is accomplished through empowering employees and leveraging business relationships through training and guidance by BERT.

HOMEOWNERS ASSOCIATION AFFILIATION

COMMUNITY ASSOCIATION INSTITUTE

CAI NATIONAL- CAI provides information and education to community associations and the professionals who support them. Our mission is to inspire professionalism, effective leadership and responsible citizenship.



Courtesy Patrol Specialists

Southern California's Patrol and Guard Service Specialists

Please feel free to contact our references listed below.

Kara Foley
Keystone Property Management, Inc
99 Ranch Land, Irvine, CA 92620
949.833.2600
kfoley@keystonepacificc.com

Christian Long, CMCA
Optimum Property Management
230 Commerce, Suite 250
Irvine, CA 92602
714.508.9070
clong@optimumpm.com

Lisa Parra, CCAM
Community Manager
BHE Management Corporation
949.363.1963
Lparra@bhemangement.com



PATROL-ONE.COM

Parking Enforcement and General Security for Community Associations and Apartments Proposal



Prepared for:

Laurelmont

(4/23/21)

Offices:

1820 E 1st Street Suite 210 / Santa Ana, Ca. 92705

1101 California Ave Suite100 / Corona, Ca. 92881

37600 Sky Canyon Dr Suite D / Murrieta, Ca.92563

Mike Bancroft:

714.361.5050 (Direct line) or 951.354.0999 X5050

714.541.0990 (Fax)

mikebancroft@patrol-one.com

PPO# 6466

Introduction:

Everything you will ever need to know about parking enforcement in community associations and apartment complexes is covered in only two words, **PATROL ONE**.

We've been *Passionate about Parking* since 1990. We've thought about parking from inside the box, outside the box and from every imaginable angle. We've conducted focus groups, workshops, surveys and seminars. We've consulted hundreds of Community Managers and thousands of Board Members.

All this because, we are truly *Passionate about Parking...* and we desperately want to be the very best parking enforcement company in the world. To be the best parking enforcement company in the world you have to meet and exceed the needs of community association Boards of Directors and Community Managers. And, to do that, there is one simple, but not easy, rule.

Provide the most BANG for the BUCK.

Here's what we know it takes to produce a huge BANG for a very few BUCKS:

- Provide professional licensed officers in new vehicles, both highly visible
- Provide the Board with complete control and tracking of common area parking
- Resolve the most difficult parking issues, such as stored vehicles, residents not using their garages and driveway for parking, and abuse of guest parking.
- Be highly responsive to Board Members, Residents and Community Managers
- Provide a knowledgeable and friendly staff
- Provide simple and comprehensive online services
- Provide impeccable documentation and easily read "real-time" citation and towing reports that can be access on demand or emailed at any schedule.

And, remember, all the above must come at the most competitive price.

Our "play before you pay" offer:

As the pioneers of private community resident and guest parking programs, we have developed our proprietary custom tailored tracking and control programs over the past 25 years. The combination of a criteria based program, database technology, license plate recognition, real-time reporting, and Board and Management online access, allow us to guarantee results!

Patrol One is willing to develop and custom tailor a parking program, fully provide and manage a resident and guest parking program, and provide nightly patrol enforcement services. The **Association will not be obligated or commitment to pay or keep our services for the first three months**. If after 90 days the Board agrees that our programs, technology, and services have been successful, only then would they agree to pay for the first 3 months and choose to continue our proven parking program moving forward. **We are willing to prove ourselves before you pay a dime!**

Scope of Service (typical):

An unarmed, fully uniformed officer in a distinctly marked patrol vehicle, equipped with two-way UHF radio and/or cellular communications linking him to our 24 hour a day Communications Center will patrol your property.

The officer's on-site duties to be as mutually agreed, however, the duties listed below are many of the service options.

- Provide a high profile crime deterrent presence with vehicular and foot patrol of the property.
- Enforce parking rules and regulations as defined by the Board of Directors.
- Ensure those who appear to have no legitimate business or are loitering are approached in a diplomatic manner and identified and when appropriate escorted from the property.
- Notify management of any person(s) engaged in unauthorized activity, any unsafe or obnoxious activity.
- Respond to requests for assistance from residents on as needed basis.
- Report any and all maintenance related items, e.g. burned out lights, broken sprinklers, vandalism and malicious mischief.
- Provide walk-throughs of all recreational facilities, including lock ups and unlocks. Please note that most facilities are scheduled for lock ups and unlocks at the same time. Therefore, we must request our clients' forbearance with regard to precise lock and unlock times.
- Every officer is equipped with a "real-time" tablet that allows up to date citation and safelisting information, and also vehicle history. Also all of our tablets can be tracked via GPS.
- Our phones are monitored by "live" and knowledgeable Patrol One employees 24/7.
- With our digital parking program, residents have the option to fully manage their resident and guest vehicles by simply using our smartphone app.
- Officer reports as well as citation and towed vehicle reports are available 24/7 online.
- Included with our parking programs, full tracking and history by vehicle and/or by address is also available with Board and Management online access 24/7.

Cost Per Billing Period (28 days):

A number of factors can influence the cost of service. Best practices dictate that we should meet an association representative and discuss the association's goals and objectives and, perhaps, walk the community, all in an effort to prepare and present the most accurately tailored response to your request for proposal. However, that approach, frequently, is impractical and we must present you with a bid that is our best estimate. Here are a number of factors to be considered when preparing such an estimate:

1. Complexity of parking rules and regulations
2. Association's policy with regard to strictness of enforcement (strict enforcement reduces the total number of violations, thus, reducing patrol workload and saving the association money)
3. Total number of patrol inspections per week (there is a discount for volume)
4. Proximity to other accounts
5. Average time on-site

These are our assumptions:

- A. The association's parking rules and regulations, as they are to be enforced, are relatively simple and straight forward.
- B. The association has or will adopt a policy of rather strict enforcement
- C. The total number of inspections is one or more per 24 hour period
- D. The subject association is within about two (2) miles of a current Patrol One account
- E. The average time on-site is 10-15 minutes. Please bear in mind that this is an average. When an account first comes on-board, we will be spending a much larger amount of time on-site ensuring compliance. This is especially true when there has been little or no prior enforcement. As time goes on, we will be able to reduce time on-site due to closer to 100% compliance. We aim for a maintenance level of 10-15 minutes once we have reached maintenance levels.

Based on the above, our rate will be **\$12.50** per inspection.

Typically, an invoice amount would be derived by the following calculation:

2 inspections, seven days per week X 28 days (our billing period) X \$12.50 = \$700.00

Guest digital parking program Management, administration, database track, of a custom tailored on line guest "**Safelisting by Address**" program using license plate recognition technology (197 units X \$.25) = \$49.25

TOTAL (with resident and guest parking programs) = \$749.25

The above quote is valid for 60 days from the date of issue.

More information on Patrol One & Our Services:

Please consult the following modules which we have supplied separately to your Community Manager.

- **About Patrol One**

- ✓ License Plate Recognition Technology
- ✓ Criteria Based Parking Programs
- ✓ Three Essential Elements
- ✓ Mission Statement
- ✓ Comparison Checklist
- ✓ Management
- ✓ Patrol Officers
- ✓ Background checks
- ✓ Service Area
- ✓ Equipment
- ✓ Communication
- ✓ Uniforms
- ✓ Professional Affiliations
- ✓ Documentation and Systems that work
- ✓ Post Orders
- ✓ Hotlists
- ✓ Reports
- ✓ Compliance Issues

- **Parking Permit Program**

- **Signage available**

- **Contract**

- **Overview of services**

- **References**

- **Insurances, W-9 Information & State and Federal Tax Identification**

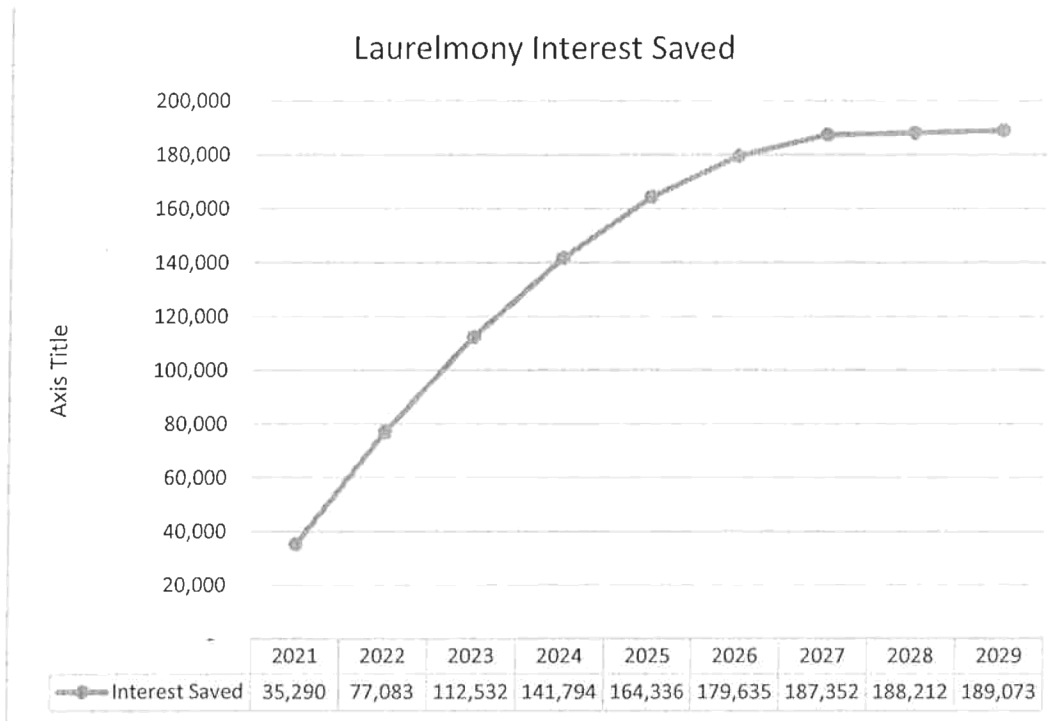
Thank you for choosing Patrol One...

Passionate about Parking since 1990

Board Item for 4/27/21 meeting: Pay-off of the Pacific Premier loan.

Objective: Save the owners approximately \$189,000. This is almost \$1,000 per owner.

How? Immediately pay in full the repipe loan balance of approximately \$861,000. The accrued interest owed on this loan is approximately \$189,000 over the next 7 years. The interest saved is graphed below:



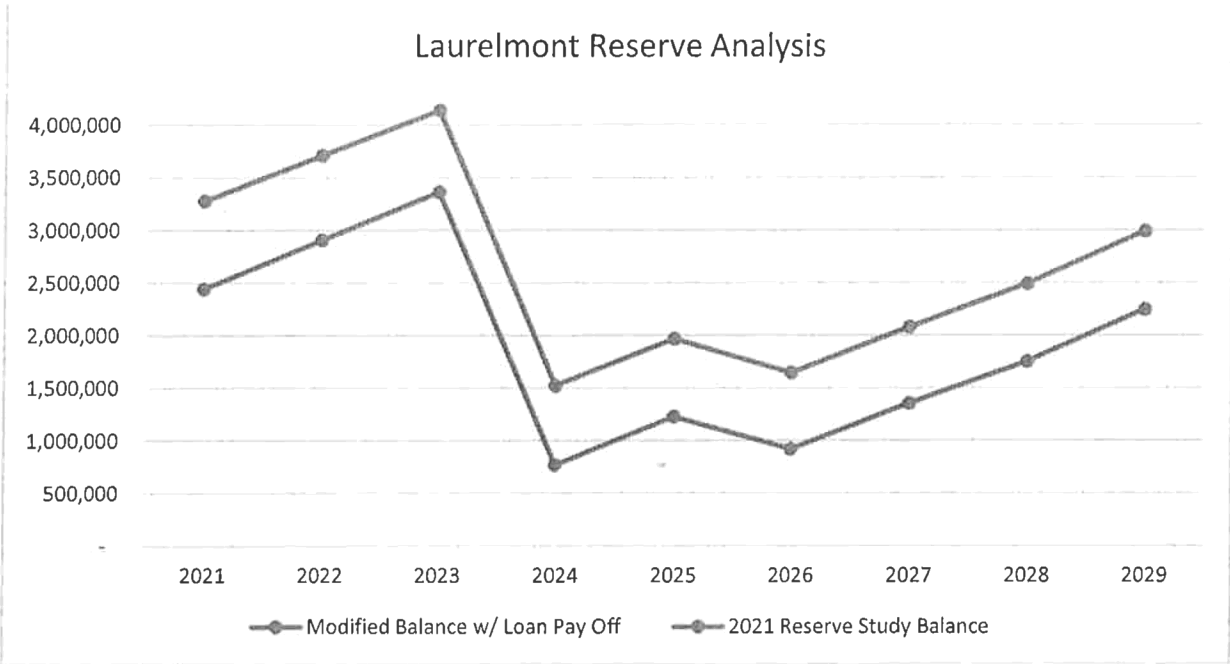
Positive: If the loan were paid off immediately, the association and owners would have this extra money to put into the community OR, decrease dues, or both. This is equivalent to almost \$1,000 per owner. Just the savings for 2021 are approximately \$20 per month per owner. I recommend that most, if not all of this saving go to reserves, but this gives us room to look hard at other expense and reserve items and **CUT or hold dues flat next year.**

In the event of an unexpected **material** expense that is not budgeted, and we have insufficient reserves or no budget for such expense, our worst case scenario is we borrow again (and we have proven we are able to and are credit worthy), so I see no reason to not prepay this loan in full.

Negative: Our reserve balance would be decreased by approximately \$860,000 and put us at around \$2.5 million. Although we add approximately \$480,000 to reserves each year, we have a big roofing project scheduled for about 3 years from now. However, even with the loan payoff and reserve decrease, we are projected to have almost \$800,000 in the reserve account AFTER the \$2.5 million roofing project and we are projected to keep increasing reserves comfortably from there.

Financial Analysis: The analysis below is from the November 2020 Reserve Report approved by the board for the January 1, 2021 Annual Policy Statement and Budget. The reserve report

balance is compared to the projected reserve balance if the loan were paid off and the related interest added to reserves.



Animal Pest Management Services, Inc.

13655 Redwood Ct, Chino CA 91710 | (909) 591-9551

Work Order - Laurelmont - rats near 81 Primrose - relocate 2 stations closer to home

Service Date	4/26/2021	Technician	Mark Martinez
Customer Name	Laurelmont Community Association	External Work Order #	39
Customer #	90605111	Internal Work Order #	96387-1
Service Location	81 Primrose aliso viejo, CA		

Pests	Rat
Bait Stations	
Traps	
Chemicals	0.5 x Ditrac All-Weather Cake (lbs)

Office Notes	Please move two bait stations closer to 81 Primrose. H/O reports wires in vehicle are being eaten by rats and has had to take car into shop twice. requested by Rayna Schonwit
Recommendations	inspected for activity relocated rat station by garage there already is one other station by gate leading to backyard



Project Planning and Review

Ross Construction Management will perform the following tasks as Phase 1 of the Re-Construction Projects

Project Walks

- Ross Construction Management starts every project with an initial site walk to familiarize ourselves with the details of the community and scopes of work for potential projects.

Development of the Association “Wish List”

- Work with the Board of Directors to develop a “wish list” which includes everything the Association desires from each of the individual construction projects. Items indicated by Board of Directors will be prioritized prior to work commencing and as the projects progress.

Specification Guidelines / Scopes of Work

- A scope of work will be developed for each project after visiting the community and reviewing the Board’s “wish list”.
- The scope of work will include: efficiency managing multiple projects in unison, materials to be used, process of material preparation, site regulations, construction application and procedures, building safety, noticing procedures, and installation guidelines.
- Project matrixes will be developed to identify the specifics of the community and project. Ross Construction Management will develop unit cost pricing and/or project total pricing depending on the specifics of each trade.



Hold a Contractor Bid Walk

- Site walk with contractors to educate them on the existing conditions around the job site
- Provide the contractors with the project specification guidelines
- Set a protocol for bidders to request additional information and how that information is to be shared with all other bidders to ensure “apples to apples” bids
- Review tentative schedules with all bidders to make sure they are staffed and available to meet the needs of the community

Apples-to-Apples Bids

- A request for proposal (RFP) will be sent to multiple contractors to obtain pricing for each job. Unit pricing will be broken down specifically to accommodate each trade. This will generate “apples to apples” bids and locks in pricing for future change orders.
- The bids received from the contractors and the scope of work will be reviewed against the “wish list”. At this time the association will be able to determine if everything on the “wish list” can be accomplished. Ross Construction Management and the Board will work together to review bids, the scope of work, and the budget to ensure the community uses construction funds to acquire the most benefit for the community.

Contractor Interviews & Selection

- Hold contractor interviews with the property management, Board of Directors and contractors
- Review bidder interviews and proposals with property management and the Board of Directors
- Select a contractor for each trade



Construction Management

Ross Construction Management will perform the following tasks as Phase 2 of the Wood Project

Project Mark-Up

Ross Construction Management will instruct the contractor to take the wood and siding replacement matrix and mark all items that are to be replaced / repaired on-site. Ross Construction Management will walk the property with the contractor to verify all items on the matrix have been marked for replacement / repair.

During the project mark-up, additional items may be identified for replacement. These items will be added to the unit cost of the project.

Weekly Progress Walks

Ross Construction Management will walk the project to make sure the scope of work is being followed, quality standards are met, questions are answered, and the contracted items are being replaced as indicated by the matrix.

No change order work will be performed without visual approval from Ross Construction Management.

Billing and Change Order Management

All billing and change orders will be reviewed for accuracy and thoroughness. No payment approvals will be made without walking the completed work with the applicable contractor.



Construction Verification

After substantial completion of construction phases, Ross construction Management will walk each unit / building with the contractor to confirm the work previously approved on the matrix has been completed. We thoroughly walk the property to make sure that there is no double billing and each piece that the community is paying for has been replaced.

Ross Construction Management will perform the following tasks as Phase 2 of the Painting Project

Pre-construction Job Walk:

- Meet on-site with the awarded contractor, product manufacturer representative (if needed), Board (if desired), management, etc.
- Review contractor's submittals for accuracy and completeness
- Identify staging areas with management approval
- Review contractor's proposed schedule and tailor it to the Association if needed
- Go over requirements and details associated with this specific job site

Final Review of Project Information:

- Final submittal review
- Final schedule review
- Final Plan and Permit review prior to permit application

Project Noticing:

Communication is the most important aspect to any construction project; RCM will review the following;

- Pre-construction project overview notices
- Building/unit specific courtesy notices
- Noticing schedule



Weekly Meetings:

Attendees will include Ross Construction Management, contractor's project manager, contractor's foreman, Board representative if desired, and property management if desired

Random Site Visits:

Random visits will take place in addition to the weekly meetings. Random visits are set to;

- Ensure the proper materials are being used
- Ensure the proper procedures are being used
- Make sure safety procedures are being maintained
- Check the job site cleanliness
- Etc.

Final Inspection Per Building:

Covers the following;

- Building punch-lists for the project
- Punch list sign-off
- Building final report that includes pictures and explanations of what has taken place
- Review the work of the contractor with all applicable product manufacturer representatives

Billing and Change Order Review:

- Review all progress billing and issue approvals for payment
- Review any change orders prior to the work being approved to ensure that the work is actually necessary
- Check all change order work for completeness
- Review all change order billing and issue approvals for payment
- Review warranty package from contractor prior to submitting final payment approval to the Board



Consulting Fees

Consultant will perform the Phase 1 scope of work for \$2,000.00. \$2,000.00
Deposit Required.

Consultant will perform the Phase 2 scope of work for 7.00% of the
construction costs.

Phase 2 Contract will be provided after initial approval including a payment
schedule.

Owner's Approval:

Date

9/3/2020

approved via Board Minutes

Laurelmont Wood and Paint Comparison

	Accurate	1st Street	Pacific Western	Pilot	Prestige
	Line Cost	Line Cost	Line Cost	Line Cost	Line Cost
Wood Base Bid (Unit Cost with "Assumptions")	\$231,675.36	N/A	\$122,460.82	\$124,337.00	\$124,927.00
Paint Base Bid	N/A	\$197,940.00	\$166,919.67	\$201,500.00	\$147,750.00
Wood and Paint Base Bid Contingency (35% - adjustable)	\$81,086.38	\$69,279.00	\$101,283.17	\$114,042.95	\$95,436.95
Wood and Deck Project Total with Contingency	\$579,980.74		\$390,663.66	\$439,879.95	\$368,113.95
Selected Wood Options	TBD		TBD	TBD	TBD
Selected Paint Options		TBD	TBD	TBD	TBD
Time and Material for additional work (Per Man Hour)	\$120.00	\$55.00	\$69.50	\$55.00	\$45.00

Laurelmont HOA

Wood Components - Bid Form - Attachment A

Wood Component	Size	Community Length (Assumption)	Unit of Measure	DF #1		DF #1				WindsorOne				DF #1		DF #1	
				Unit Cost Per One Unit of Measure	Extended Cost for Community	Accurate		Pacific Western		Pilot		Prestige					
				Unit Cost Per One Unit of Measure	Extended Cost for Community	Unit Cost Per One Unit of Measure	Extended Cost for Community	Unit Cost Per One Unit of Measure	Extended Cost for Community	Unit Cost Per One Unit of Measure	Extended Cost for Community	Unit Cost Per One Unit of Measure	Extended Cost for Community	Unit Cost Per One Unit of Measure	Extended Cost for Community		
Fascia	2x10	974	1 LnFt	\$34.50	\$33,603.00	\$16.52	\$16,090.48	\$24.23	\$23,600.02	\$21.00	\$20,454.00	\$15.00	\$14,610.00				
Fascia Shadow Board	2x6	2157	1 LnFt	\$17.25	\$37,208.25	\$11.91	\$25,689.87	\$15.35	\$33,109.95	\$10.00	\$21,570.00	\$15.00	\$32,355.00				
Gable Fascia	2x10	410	1 LnFt	\$34.50	\$14,145.00	\$16.52	\$6,773.20	\$24.25	\$9,946.60	\$22.00	\$9,020.00	\$17.00	\$6,970.00				
Gable Shadow Board	2x6	1286	1 LnFt	\$17.25	\$22,183.50	\$11.91	\$15,316.26	\$15.35	\$19,740.10	\$10.00	\$12,860.00	\$17.00	\$21,862.00				
Gable Jamb	2x8	24	1 LnFt	\$138.00	\$3,312.00	\$15.27	\$366.48	\$20.68	\$496.32	\$22.00	\$528.00	\$12.00	\$288.00				
Window Trim	2x4	716	1 LnFt	\$17.25	\$12,351.00	\$9.03	\$6,465.48	\$11.18	\$8,004.88	\$10.00	\$7,160.00	\$8.00	\$5,728.00				
Window Trim	2x6	123	1 LnFt	\$17.25	\$2,121.75	\$11.50	\$1,414.50	\$14.92	\$1,835.16	\$11.00	\$1,353.00	\$10.00	\$1,230.00				
Window Trim	2x8	24	1 LnFt	\$17.25	\$414.00	\$13.80	\$331.20	\$19.30	\$463.20	\$13.00	\$312.00	\$12.00	\$288.00				
Bay Window Trim	2x6	93	1 LnFt	\$34.50	\$3,208.50	\$11.55	\$1,074.15	\$14.96	\$1,391.28	\$11.00	\$1,023.00	\$10.00	\$930.00				
Bay Window Fascia	2x10	52	1 LnFt	\$51.75	\$2,691.00	\$17.01	\$884.52	\$24.63	\$1,280.76	\$14.00	\$728.00	\$12.00	\$624.00				
Corner Trim	2x2	20	1 LnFt	\$34.50	\$690.00	\$7.31	\$146.20	\$8.27	\$165.40	\$8.00	\$160.00	\$8.00	\$160.00				
Corner Trim	2x4	374	1 LnFt	\$34.50	\$12,903.00	\$9.05	\$3,384.70	\$11.20	\$4,188.80	\$10.00	\$3,740.00	\$10.00	\$3,740.00				
Corner Trim	2x6	8	1 LnFt	\$34.50	\$276.00	\$12.95	\$103.60	\$16.65	\$133.20	\$11.00	\$88.00	\$12.00	\$96.00				
Gate Trim	1x2	8	1 LnFt	\$17.25	\$138.00	\$7.32	\$58.56	\$7.06	\$56.48	\$7.00	\$56.00	\$6.00	\$48.00				
Gate Trim	2x4	34	1 LnFt	\$25.87	\$879.58	\$9.42	\$320.28	\$11.51	\$391.34	\$9.00	\$306.00	\$7.00	\$238.00				
Gate Trim	2x6	82	1 LnFt	\$25.87	\$2,121.34	\$11.60	\$951.20	\$14.98	\$1,228.36	\$11.00	\$902.00	\$8.00	\$656.00				
Gate Trim	2x8	95	1 LnFt	\$34.50	\$3,277.50	\$13.16	\$1,250.20	\$18.73	\$1,779.35	\$13.00	\$1,235.00	\$9.00	\$855.00				
Entry Door Trim	2x4	72	1 LnFt	\$25.87	\$1,862.64	\$9.23	\$664.56	\$11.33	\$815.76	\$11.00	\$792.00	\$8.00	\$576.00				
Entry Door Trim	2x6	26	1 LnFt	\$25.87	\$672.62	\$11.95	\$310.70	\$15.37	\$399.62	\$10.00	\$260.00	\$9.00	\$234.00				
Entry Door Trim	2x8	8	1 LnFt	\$25.87	\$206.96	\$14.71	\$117.68	\$20.80	\$166.40	\$13.00	\$104.00	\$10.00	\$80.00				
Wall Caps	2x6	48	1 LnFt	\$25.87	\$1,241.76	\$12.17	\$584.16	\$15.65	\$751.20	\$10.00	\$480.00	\$7.00	\$336.00				
Wall Caps	2x8	215	1 LnFt	\$25.87	\$5,562.05	\$13.86	\$2,979.90	\$19.39	\$4,168.85	\$13.00	\$2,795.00	\$8.00	\$1,720.00				
Wall Caps	2x10	41	1 LnFt	\$25.87	\$1,060.67	\$17.39	\$704.79	\$24.74	\$1,014.34	\$14.00	\$574.00	\$9.00	\$369.00				
Belly Band	2x10	345	1 LnFt	\$29.57	\$10,201.65	\$16.56	\$5,713.20	\$24.27	\$8,373.15	\$17.00	\$5,865.00	\$12.00	\$4,140.00				
Garage Jamb	2x8	146	1 LnFt	\$34.50	\$5,037.00	\$13.08	\$1,909.68	\$18.67	\$2,725.82	\$23.00	\$3,358.00	\$22.00	\$3,212.00				
Garage Trim	2x6	644	1 LnFt	\$25.87	\$16,660.28	\$11.35	\$7,309.40	\$14.82	\$9,544.08	\$13.00	\$8,372.00	\$12.00	\$7,728.00				
Garage Trim	1x4	8	1 LnFt	\$25.87	\$206.96	\$9.00	\$72.00	\$8.97	\$71.76	\$8.00	\$64.00	\$8.00	\$64.00				
Soffit Trim	1x2	12	1 LnFt	\$17.25	\$207.00	\$7.22	\$86.64	\$6.76	\$81.12	\$7.00	\$84.00	\$8.00	\$96.00				
Wall Trim	1x2	30	1 LnFt	\$17.25	\$517.50	\$6.57	\$197.10	\$6.40	\$192.00	\$7.00	\$210.00	\$6.00	\$180.00				
Wall Trim	2x4	21	1 LnFt	\$17.25	\$362.25	\$9.81	\$206.01	\$11.72	\$246.12	\$9.00	\$189.00	\$7.00	\$147.00				
Wall Trim	2x6	46	1 LnFt	\$17.25	\$793.50	\$11.68	\$537.28	\$15.12	\$695.52	\$11.00	\$506.00	\$8.00	\$368.00				
Wall Trim	2x8	8	1 LnFt	\$25.87	\$206.96	\$14.71	\$117.68	\$20.00	\$160.00	\$13.00	\$104.00	\$9.00	\$72.00				
PotshelF Trim	2x12	56	1 LnFt	\$34.50	\$1,932.00	\$19.44	\$1,088.64	\$28.52	\$1,597.12	\$16.00	\$896.00	\$16.00	\$896.00				
PotshelF Trim	2x10	234	1 LnFt	\$34.50	\$8,073.00	\$16.59	\$3,882.06	\$24.30	\$5,686.20	\$15.00	\$3,510.00	\$14.00	\$3,276.00				
PotshelF Trim	2x6	133	1 LnFt	\$25.87	\$3,440.71	\$12.06	\$1,603.98	\$15.45	\$2,054.85	\$11.00	\$1,463.00	\$12.00	\$1,596.00				
Chimney Trim	2x10	48	1 LnFt	\$25.87	\$1,241.76	\$16.82	\$807.36	\$24.66	\$1,183.68	\$21.00	\$1,008.00	\$10.00	\$480.00				
Chimney Trim	2x6	94	1 LnFt	\$25.87	\$2,431.78	\$12.11	\$1,138.34	\$15.50	\$1,457.00	\$11.00	\$1,034.00	\$16.00	\$1,504.00				
Radius Trim	2x4	10	1 LnFt	\$69.00	\$690.00	\$27.01	\$270.10	N/A	See DF#1	\$32.00	\$320.00	\$28.00	\$280.00				
Radius Trim	2x6	8	1 LnFt	\$69.00	\$552.00	\$32.36	\$258.88	N/A	See DF#1	\$22.00	\$176.00	\$32.00	\$256.00				
Meter Closet Trim	2x4	72	1 LnFt	\$25.87	\$1,862.64	\$9.23	\$664.56	\$11.33	\$815.76	\$10.00	\$720.00	\$8.00	\$576.00				
Arch Trim	2x6	10	1 LnFt	\$27.60	\$276.00	\$30.46	\$304.60	N/A	See DF#1	\$32.00	\$320.00	\$6.00	\$60.00				
Rafter Tail (2x6x3)	2x6	3	1 LnFt	\$17.25	\$51.75	\$31.29	\$93.87	\$35.53	\$106.59	\$22.00	\$66.00	\$18.00	\$54.00				
Rafter Tail (2x8x3)	2x8	6	1 LnFt	\$17.25	\$103.50	\$35.00	\$210.00	\$40.61	\$243.66	\$23.00	\$138.00	\$20.00	\$120.00				
Frieze Block (2x4)	2x4	1	1 LnFt	\$17.25	\$17.25	\$25.54	\$25.54	\$29.42	\$29.42	\$17.00	\$17.00	\$12.00	\$12.00				
Frieze Block (2x8x3)	2x8	3	1 LnFt	\$17.25	\$51.75	\$26.20	\$78.60	\$32.17	\$96.51	\$25.00	\$75.00	\$14.00	\$42.00				
Trim	2x6	16	1 LnFt	\$34.50	\$552.00	\$14.39	\$230.24	\$17.65	\$282.40	\$12.00	\$192.00	\$8.00	\$128.00				
Trim	2x8	8	1 LnFt	\$34.50	\$276.00	\$16.73	\$133.84	\$22.70	\$181.60	\$13.00	\$104.00	\$9.00	\$72.00				
Trim	2x10	32	1 LnFt	\$34.50	\$1,104.00	\$18.00	\$576.00	\$25.53	\$816.96	\$15.00	\$480.00	\$10.00	\$320.00				
6x6 entry post	6x6x16 (each)	2	Each	\$2,208.00	\$4,416.00	\$1,050.67	\$2,101.34	N/A	See DF#1	\$380.00	\$760.00	\$250.00	\$500.00				
Bondo	Each	102	Each	\$69.00	\$7,038.00	\$61.36	\$6,258.72	N/A	See DF#1	\$50.00	\$5,100.00	\$45.00	\$4,590.00				
Corbel Ends	Each	3	Each	\$414.00	\$1,242.00	\$200.83	\$602.49	N/A	See DF#1	\$290.00	\$870.00	\$55.00	\$165.00				
Time and Material Rate	Per Man Hour	TBD	Per Man Hour	\$120.00		\$69.50				\$56.00							
Stucco Texture Repair	-	-	1 SqFt	\$75.00		\$11.75								\$18.00			

Stucco System Repair	-	-	1 SqFt
Wood Siding (If Applicable)	-	-	1 LnFt
Totals			

\$136.00	
\$13.80	
\$231,675.36	

\$30.00			
\$19.21			
\$122,460.82		\$161,564.82	

\$124,337.00	

\$25.00	
\$30.00	
\$124,927.00	

Additional Options			
Pot shelf waterproofing/repair	Each	TBD	Each
Cost to Replace Full Chimney Cap (DF #1 or better)	Each	TBD	Each
Cost to Replace Full Chimney Cap (WindsorONE)	Each	TBD	Each
*Community may decide to replace all Chimney Caps			
**Option - Cost to perform a PROBING inspection prior to project start and provide a workable matrix per unit/building			No Charge if awarded Project
**Option - Cost to perform a VISUAL inspection prior to project start and provide a workable matrix per unit/building			

Accurate	
\$950.00	
\$650.00	
\$750.00	

Pacific Western	
\$1,834.43	
\$2,152.18	
\$2,312.37	
\$9,791.64	
\$5,087.00	

Pilot	
\$900.00	
\$425.00	
\$570.00	
\$2,955.00	

Prestige	
\$1,675.00	

Laurelmont Project Paint Bid Comparison - 1/20/21

197 Total Units	Accurate / 1st Street Painting	Pacific Western Painting & Construction	Pilot Painting & Construction	Prestige Paint & Decorative
Base Bid Prep and paint specified surfaces Paint Manufacturer Sherwin Williams (Duration) Spot prime and paint 1 coat	\$ 197,940.00	\$ 166,919.67	\$ 201,500.00	\$ 147,750.00
Project Contingency Amount _____ % of Base Bid 35%	\$ 69,279.00	\$ 58,421.88	\$ 70,525.00	\$ 51,712.50
Total Project Costs Base Bid + 35% Contingency	\$ 267,219.00	\$ 225,341.55	\$ 272,025.00	\$ 199,462.50
Mobilization/Down Payment Costs	None	5-10% of contract value (Negotiable)	None	15% (\$22,163.00)
Re-mobilization Costs	None	\$500.00 (Negotiable)	\$1,500.00	10% (14,775.00)
Base Bid Includes				
Trench below grade when applicable to paint, then backfill	confirmed	confirmed	confirmed	confirmed
Project consists of wood trim and fascia only. No siding or stucco is included.	confirmed	confirmed	confirmed	confirmed
Pool building and pool trellis are included (no siding or stucco)	confirmed	confirmed	confirmed	confirmed
Wrought iron paint at homeowner entrance gate is to be included	confirmed	confirmed	confirmed	confirmed
Satellite cables are to be removed from the building to paint the wood behind it. Homeowners are responsible for reinstallation afterwards	confirmed	confirmed	confirmed	confirmed
Benches located on Primrose are included	confirmed	confirmed	confirmed	confirmed
Wood will be painted the same color as it is currently (no color change)	confirmed	confirmed	confirmed	confirmed
Pressure wash and proper preparation is needed prior to paint	confirmed	confirmed	confirmed	confirmed
Sampling of paint specs and finish of one unit (front only) is to be completed prior to production starting	confirmed	confirmed	confirmed	confirmed
If termite infested wood is discovered, termite company is to be contacted immediately to address before area can be painted	confirmed	confirmed	confirmed	please confirm this is included
Optional Items				
Apply second coat (Duration)	\$98,970.00 (In addition to base bid)	\$50,212.33 (In addition to base bid)	\$ 73,000.00	\$44,325.00 (In addition to base bid)
Full prime and paint one coat (Duration)	\$118,765.00 (In addition to base bid)	\$289,216.13 (In replacement of base bid)	\$265,000.00 (In replacement of base bid)	\$162,525.00 (In addition to base bid)
Full prime and paint one coat top caps/ wall caps only (Duration) (Paint is included in the base bid)	\$3,545.00 (In addition to base bid)	\$33,057.65 (In addition to base bid)	\$6,000.00	\$29,550 (In addition to the base bid)
Apply Second coat to Caps / Wall tops only (Duration)	\$1,420.00 (In addition to base bid)	\$34,189.98 (In addition to base bid)	\$6,500.00 (In addition to base bid)	\$8,865.00 (In addition to the base bid)
Full prime and paint second coat to Caps / Wall tops only (Duration)	\$4,965.00 (In addition to base bid)	\$42,132.98 (In addition to base bid)		\$49,250 (Is this in addition to the base bid?)
Chimney Cap housing (Tall - Difficult Access) each (metal)	\$ 350.00	Confirmed, no price difference between Chimney cap housings \$78.55	\$150.00	Confirmed, no price difference between Chimney cap housings \$250
Chimney Cap housing (Short - Easy Access) each (metal)	\$ 200.00	Confirmed, no price difference between Chimney cap housings	\$120.00	Confirmed, no price difference between Chimney cap housings
Utility doors will be painted on an as needed basis per pair (Exterior and return side only)	\$ 75.00	\$ 59.05	\$ 70.00	\$ 300.00
Homeowner front entry doors will be painted on a request basis (Doors are not included in base bid)	\$ 75.00	\$ 100.30	\$ 120.00	\$ 175.00

Stripping Entry Doors (Exterior Side) (Doors are not included in base bid)	\$550.00 each door	\$500.00 each door	\$410.00	\$275.00 each door
Homeowner garage doors will be painted on a request basis (Doors are not included in base bid)	\$ 125.00	\$ 165.48	\$ 130.00	\$ 200.00
Stripping Garage Doors (Exterior Side) (Doors are not included in base bid)	\$975.00 each door	\$500.00 each door	\$580.00	\$350.00 each door
Paint homeowner rain gutters (per unit)	No additional cost Does not include cleaning out the gutters	\$1.97 per lineal foot \$1.57 per lineal foot to clean out prior to paint Paint is \$1.55 per SqFt	No additional cost to paint gutters \$90.00 per unit to clean gutters	\$200 Includes cleaning out the gutters
Paint homeowner trellis	\$2.50 per SqFt (spot prime and one coat finish) \$3.50 per SqFt (full prime and one coat finish)	Wood repair is \$69.50 per hour + material + 20% markup Page 2; Item #1 - the "initial approved pricing" is \$2.99/sqft+T&M. Can you please clarify?	Separate quote with H.O. directly \$4.50 per SqFt (price may vary depending on prep work needed)	\$8.00 per SqFt
Spot prime and paint 1 coat (A-100)			\$ 175,500.00	N/A
Apply second coat (A-100)			\$ 63,000.00	N/A
Full prime and paint 1 coat (A-100)			\$ 236,000.00	N/A
Second coat to caps/ wall tops only (A-110)			\$ 6,500.00	N/A
Removal of nails, hooks, screws, staples, etc.	Included	Included	Included	Included
Time and Material Rate per man hour	\$55.00	\$69.50	\$55.00 per man hour \$72.00 per gallon	\$45.00 per man hour
Excluded Items				
Wood siding (contractor is responsible for touchups if stucco is not properly masked/protected).				No action
Building stucco (contractor is responsible for touchups if stucco is not properly masked/protected).				No action
Pool wrought Iron				No action
Homeowner gutters (optional price to be provided)	no charge Does not include cleaning out gutters		No Charge	No action
Homeowner trellis (optional price to be provided)	Individual quote to be provided to homeowner directly		Individual quote to be provided to homeowner directly	No action
Project Total				

		Accurate (First Street)	Pacific Western	Pilot Painting	Prestige
Warranties	Stucco:	N/A	N/A	N/A	N/A
	Wood:	4 years	5 years	3 years	5 years
	Metal:	2 years	3 years	2 years	5 years
	Copper:	N/A	N/A	N/A	N/A
Posting homeowner notices prior to work beginning		Yes	Yes	Yes	Yes
Was proposal submitted on time?		Yes	Yes	Yes	Yes
If additional paint is needed to meet Sherwin Williams Spec per what has been estimated, how will this be handled?		Confirmed - No additional costs to meet Sherwin Williams spec's if bid is under <i>estimated</i>	Confirmed - No additional costs to meet Sherwin Williams spec's if bid is under <i>estimated</i>	Confirmed - No additional costs to meet Sherwin Williams spec's if bid is <i>under estimated</i>	Confirmed - No additional costs to meet Sherwin Williams spec's if bid is under <i>estimated</i>
Approximate Job Duration (weather permitting and full cooperation of residents)		3 months	4 to 5 months	79 Working Days	18 weeks
Bid price expiration		4/30/2021	3/30/2021	90 days from 12/23/20	None listed, please provide if there is an expiration.

Notes/Questions/Comments

Contractor	Paint Base Bid	Option 1 Full Community			Option 2 Top and Wall Caps Only			Option 3 Merged Community + Top Caps			Option 4 Chimney	Option 5 Chimney	
		1.A	1.B	1.C	2.A	2.B	2.C	3.A	3.B	3.C			3.D
Base Bid	Prep and paint specified Williams (Duraton) Spot prime and paint 1 coat	Base Bid + additional coat (Spot Prime + 2 coats)	Full Prime community then (Full Prime + 1 coat)	Full Prime community and then paint additional coat (Full Prime + 2 coats)	Base scope then add second coat to top caps only (Spot Prime + 2 coats)	Full Prime top caps only then (Full Prime + 1 coat)	Full Prime top caps only, paint second coat top caps only (Full Prime + 2 coats)	Base Bid + Full Prime on Top Caps Only + Full Prime on Top Caps (Spot Prime community + Full Prime Top Caps + 1 coat)	Base Bid + additional coat With Full Prime only on Top Caps (Spot Prime Community + Full Prime Top Caps + 2 Coats)	Base Only + Second Coat on Top Caps only (Spot Prime community + Full Prime Top Caps + 1 coat)	Full Prime Community + Second Paint Coat to Top/Wall Caps Only (Full Prime + 1 coat + second coat top cap)	Caulking metal on chimney caps where metal meets the wood (As needed basis)	Chimney Cap Housing Paint *Assume each home has one chimney = 19 total **Assume tall vs short access is split 50/50 (98 tall/99 short)
Accurate	N/A												
First Street Painting	\$197,940.00												
Pacific Western	\$166,849.67												
Pilot Painting and Construction	\$201,500.00												
Prestige Paint/CPR	\$147,750.00												
First Street Painting		\$296,910.00	\$316,705.00	\$415,675.00									
Pacific Western		\$217,162.00	\$289,216.13	\$339,428.46									
Pilot Painting and Construction		\$274,500.00	\$265,000.00	\$338,000.00									
Prestige Paint/CPR		\$192,075.00	\$310,275.00	\$354,800.00									
First Street Painting					\$199,360.00	\$201,485.00	\$202,905.00	\$201,485.00	\$200,455.00	\$202,905.00	\$318,125.00		
Pacific Western					\$201,139.65	\$200,007.32	\$205,082.65	\$200,007.32	\$250,219.65	\$209,082.65	\$323,406.11		
Pilot Painting and Construction					\$208,000.00	\$207,500.00	\$214,000.00	\$207,500.00	\$280,500.00	\$214,000.00	\$371,500.00		
Prestige Paint/CPR					\$196,615.00	\$177,300.00	\$186,165.00	\$177,300.00	\$221,625.00	\$186,165.00	\$319,140.00		
First Street Painting													
Pacific Western													
Pilot Painting and Construction													
Prestige Paint/CPR													
First Street Painting													
Pacific Western													
Pilot Painting and Construction													
Prestige Paint/CPR													
First Street Painting													
Pacific Western													
Pilot Painting and Construction													
Prestige Paint/CPR													
Sherwin Williams Comments	Base Bid	"Second coat not necessary since you're using a product that equals the mil thickness of 2 coats"	"I like this scenario because priming always benefits a paint project"	"Not needed because you are using a product that equals 2 coats of paint based on mil thickness"	"Not needed since you are using a product that equals the mil thickness of 2 coats of regular paint"	"I'm good with this scenario"	"You don't need the second coat because you are using a product that is equal to 2 coats of regular paint"	"I'm good with this scenario"	"Not necessary"	"You don't need the second coat because you are using a product that is equal to 2 coats of regular paint"			
Based on the scenarios, Sherwin Williams recommends:	Base Bid	X	Recommends	X	X	Recommends	X	Recommends	X	X			X