



FIRSTSERVICE RESIDENTIAL'S

Comprehensive Services: **Supporting Our Communities with Unmatched Resources**

Since partnering with FirstService Residential, have you fully accessed and benefited from the exclusive services and value-added resources that are available to your association? As your trusted community manager, we want to ensure you are realizing the full potential of our relationship, and that begins with our unique ability to offer local expertise to communities like yours. It's our depth of resources that sets us apart.

Our comprehensive support system, made possible by our deep company infrastructure and experience, operates in all our markets throughout North America and serves all property types. By virtue of our size and scale, we're able to surround your community manager and board with empowered leaders who have deep, local market knowledge and industry expertise. These advantages also allow us to provide comprehensive, proven solutions to community issues and quickly pivot as situations change

and challenges arise within the properties we serve — all with a local touch.

The purpose of this guide is to outline for you both the human and business resources that support your community at the local level. It's also designed to help you maximize the value of your partnership with FirstService Residential by taking advantage of all that we offer:

- » The exclusive support services that are extensions of our corporate structure and capabilities.
- » The value-added resources that are available through the optional programs we have developed.

By tapping into FirstService Residential's extensive services and resources locally, your community will realize even more value from our partnership. Let's examine them more closely.

“ When boards work with us, they enjoy the small company feel, but benefit from a big company's backing. We have all the resources they need right there where they are, but we also have this expansive breadth of services that no one else can offer. Ultimately, you're getting the best of both worlds. ”

— Amy Mathieson, executive vice president, FirstService Residential



Service Delivery Structure & Capabilities

FirstService Residential is proud to be the leading residential association manager in North America, including Arizona, California and Nevada. We work hard to make a difference every day and our efforts have been both fruitful and rewarding. And it is communities like yours that benefit from our energy and experience.

We have purposefully structured our service delivery system to be easily accessible by your local community manager so that your association can more easily take advantage of the resources that FirstService Residential offers. And to further promote a close partnership with you and your fellow board members, we want to reaffirm all the reasons you selected us to manage your community.

At FirstService Residential, we surround your community manager with a team of empowered, executive-level leaders that are located in Arizona, California and Nevada to ensure there is a strong local presence with a deep understanding of the market and the communities we serve. And they have the backing of 15,000 associates and 8,500 communities across North America that bring even more knowledge and experience to the table.

This structure ensures that none of our communities are tied to just one individual — namely, your community manager — and that the entire company is responsive to your association's needs.

Each regional team is comprised of:

- » Community manager
- » Regional director
- » Vice president
- » President

Together, these professionals leverage best practices that have been shared across the organization to help our community managers, boards and communities successfully address challenges and make better use of the in-house services that are built right into FirstService Residential's corporate framework.

Exclusive Support Services

As a FirstService Residential-managed community, you can benefit from the following services because they already exist within our organizational structure and fuel how we conduct business each and every day.

1. Operations & Team-Based Administrative Services

Operations is the nuts and bolts of what happens within our communities each day and the resources that are available to address them. We work very hard to share information and solutions across our platform so that when curve balls come our way, we can quickly adjust and directly address them.

“Because of our collective expertise and capabilities as a national company, we’re able to leverage best practices and standardize operations so that we’re functioning optimally and efficiently,” said Scott Bresnick, regional vice president of operations at FirstService Residential. “Most smaller association management companies struggle with handling the diversity of issues that emerge day in and day out, whereas we’ve seen most all of them already or we’re in the midst of addressing them head on.”

The pandemic is a good example of this. Right in the beginning stages, FirstService Residential started developing best-in-class solutions so that our communities could properly and safely deal with Coronavirus.

“Here in New York, we were hit first and hardest by COVID-19 last March. In response to it, very early on we created a team of New York-based senior executives that addressed how to move forward safely which helped our properties out tremendously,” said Keith Werny, president at FirstService Residential – New York. “With us going through it first, we were able to help out the other regions. They could pick our brain and utilize the protocols we put in place to get ahead of the pandemic as much as possible.”

Another benefit is our operational structure. Each region, by design, backs its communities with various layers of capable leadership which help make transitioning easy when there is a change in personnel.

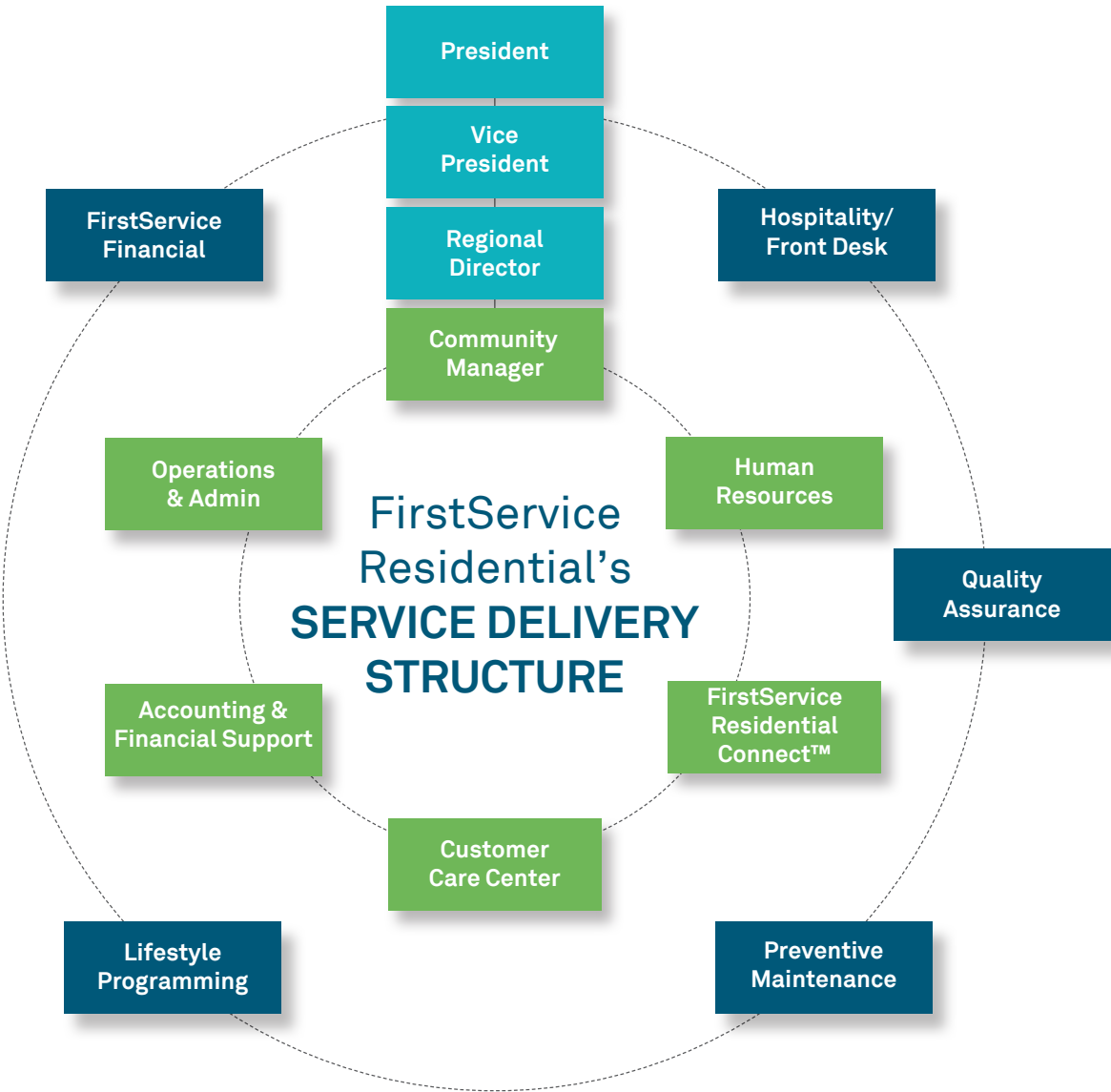
FirstService Residential has also adopted a team-based model to provide a greater depth of administrative resources to our communities. Instead of assigning just one administrative support person to a community manager, we deploy an entire administrative team that has a thorough working knowledge of the association which promotes greater continuity and consistency. This way, should one administrative person leave the community, there isn’t a big hole to fill. This team-based approach has proven to be a tremendous and unique asset for our community managers and our associations.

- LEADERSHIP SUPPORT
- EXCLUSIVE SUPPORT SERVICES
- VALUE-ADD RESOURCES

“

Our support structure starts with the community at the center, and then expands to all of the resources surrounding it from an operations standpoint — locally, regionally, nationally — as you move out from the bullseye. In other words, if the community manager is not available, then the next level is the regional director, and so on — right up through the chain of command. ”

— Kirk Kowieski, vice president at FirstService Residential Arizona



2. Accounting & Financial Support

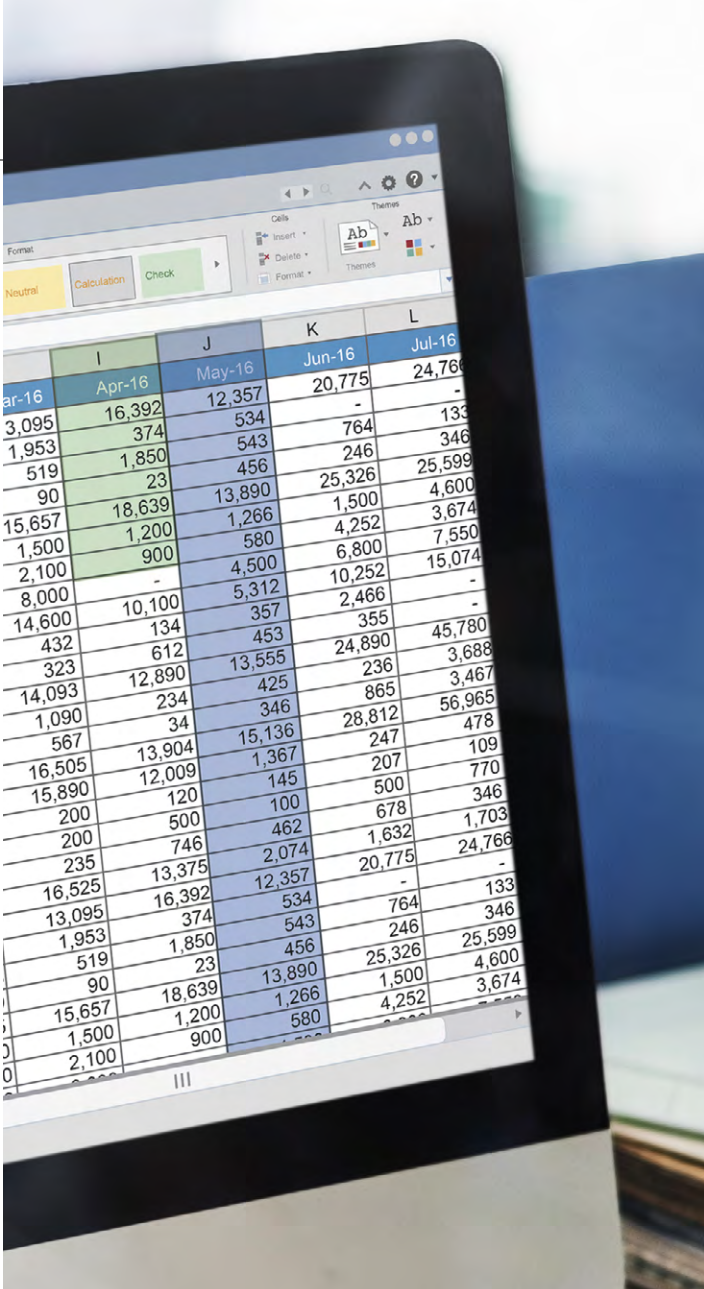
Because of the extensive resources we have carefully placed within our regions, your community manager and board have easy access to accounting and financial experts — professionals who are well versed in Accounts Payable, Accounts Receivable, and General Ledger accounting practices and very adept at preparing financial reports for associations.

In addition, because of our scale, we are able to segregate duties and utilize a system of checks and balances to ensure a smooth financial auditing process for your community.

“At smaller association management companies, the person writing the checks is the same one that’s bouncing them,” said Steven Parker, president at FirstService Residential – Nevada. “At FirstService Residential, not only are our departments segregated, but our software is as well. We also regularly perform audits to determine whether these segregations are valid and appropriate. That’s an important benefit for communities that have lost money in the past.”

Community management companies that don’t have these financial resources in house must resort to using third parties for accounting software and support. But at FirstService Residential, we’ve invested time and money in developing proprietary accounting software.

Werny offers this perspective:



“What’s unique about FirstService Residential is that we actually invest in our company. Because we have our own accounting software, we can customize it so that it is more applicable to a specific community’s issues and can better solve its problems.”

In some areas, FirstService Residential also offers financial consulting on the local level to address a variety of needs including capital planning, protection against losses, tax planning and preparation, investments and insurance.

3. Customer Care Center

One of the many ways we deliver exceptional service is through our U.S.-based Customer Care Center, a 24/7/365 multi-lingual, call-in resource where residents can get immediate help with:



- » Payments/collections
- » Account balances
- » Violations
- » Document requests
- » Access to common areas
- » Emergencies

All Customer Care Center team members are FirstService Residential associates and have real-time access to specific information about each of our communities which allows them to respond to questions and requests quickly and capably during the very first contact with residents. These FirstService Residential associates receive comprehensive training and coaching to prepare them for any scenario and ensure consistent quality and responsiveness.

We view every call as an opportunity to provide a positive experience for residents — which is why FirstService Residential's Customer Care Center has become such an integral part of our day-to-day operations.

4. Technology Ecosystem

At the core of our technology ecosystem is FirstService Residential Connect™, our proprietary community management software that facilitates community management and communication for our associates, board members and residents.

Connect assists with the dissemination and exchange of information within our communities and features two communication portals:

- » The FirstService Residential Connect Resident Portal lets residents and board members see their account balances, view calendars, reserve amenities and place service requests.
- » Connect's Associate Portal provides our teams with software that includes tools for vendor payment and communicating with residents about community events and board or membership meetings via alerts and email blasts.

In addition, because Connect is proprietary, we have a great deal of flexibility when it comes to adding new functions and features. “For example, if a community requests that we add something, such as a customized report, we have the ability to do that — and that’s important for boards to know,” said Parker. “If there’s something they need, we can have that conversation and build it.”

In other words, we can make special enhancements for your community through Connect that you may not otherwise get with an off-the-shelf software program from another management company.

By design, FirstService Residential's platforms work together to create a best-in-class ecosystem of technology that delivers real value every day. “Most of our competitors simply pick technology solutions as they react to community needs. But we’re very proactive in developing our technology solution sets and work hard to ensure they are the very best fit for each of our communities,” Bresnick said.





5. Human Resources & Training

FirstService Residential's Human Resources and Training teams are dedicated to recruiting and training highly skilled, knowledgeable and dedicated individuals with a strong customer service DNA. These teams continuously innovate, design and orchestrate the implementation of numerous training programs to support the associates who serve our communities. We offer a myriad of training programs and resources that, in terms of scale, are unmatched in our industry:

- » **FirstService Residential University** – Housing more than 1,800 compliance, operational and business courseware and serving more than 8,000 users, FirstService Residential University is the organization's on-line learning platform. Associates and managers can access courses mapped by skill and competency anytime, anywhere, to enhance their current skills or as part of their career aspirations.
- » **Community Manager Onboarding Program** – This four-stage training program is geared toward newly hired and promoted community managers and is comprised of instructor-led and virtual modules. Facilitated by subject matter experts and via interactive virtual modules residing on FirstService Residential University, the program covers a wide variety of board management, community management, property services and financial management topics, inherent to a community manager's success on the job.
- » **Regional Director Playbook** – This comprehensive guide for regional directors covers their key responsibilities and areas of focus. The playbook is the primary resource for onboarding new or promoted regional directors, and an invaluable developmental and reference tool throughout a regional director's career. The guide also includes proprietary Standard Operating Procedures that ensure constant service delivery excellence.
- » **FirstLeader Program** – Our two-day leadership development program is designed for associates at the director level and above and provides leaders with the tools, concepts and "know how" in three key areas: self leadership, people leadership and organizational leadership.
- » **Emerging Leaders Program** – Geared toward assessing and developing high performing/high potential associates who aspire to or are being considered for leadership roles, this year-long program is built around competencies reflective of people leaders. During this time, the selected

associates participate in a variety of assessment and development activities including, but not limited to group activities, group presentations and shared learning experiences.

- » **Career Development Workshops** – These sessions are designed to help associates understand how to take charge of their career and engage in more meaningful development conversations with their managers. At the same time, managers are provided with useful tips on how to better support and engage with their associates.

In addition, all markets offer customized training based on specific individual and business needs. Our highly talented team of training professionals in each market ensure our associates and managers are supported and developed at each stage of their career lifecycle with the organization.

“Our ongoing training initiatives are really there to protect the associations that have hired us — especially those who have FirstService Residential associates physically working within the community,” offered Bresnick. “Associations that are self-managed assume all of the liability that comes with having their own employees. But when we are in place and receiving ongoing support from our really strong HR department, we are able to guide our

local executives and managers in all the decisions they make every day for our communities — which, in turn, frees our clients from having to make them.”

Werny adds, “Keeping liability away from associations is very important. Compliance is a huge issue these days and exposure is a concern for us and our boards. That’s why we must be on top of our game on the HR side, and we are.”

Making sure we keep good people in our communities is paramount. That said, when you have great managers you always run the risk of losing them to other communities. To lessen that risk, we spend a tremendous amount of time focusing on career development so that a community manager, for example, can one day become its regional director, and so on. Having a succession plan is valuable not only to our associates, but also to the communities that depend on them.

We are also fully committed to training association board members so you are well equipped to lead your communities while navigating the responsibilities that come with the role. We utilize subject-matter experts for this purpose, some who are internal and others from third-party partners, and hold regular, educational meetings to honor this commitment. Most other community management companies don’t offer this kind of ongoing, in-depth support.





Value-Added, Optional Resources

In addition to the exclusive services you benefit from by partnering with FirstService Residential, there are also a number of optional, specialty resources that we make available locally to enhance community operations. And these also make FirstService Residential unique because you simply cannot find these resources elsewhere.

Please note, some of the programs described below are not available in every market. Nevertheless, we are presenting them here to give you a better working knowledge of the breadth and depth the resources that only a company of our size and scale can offer.*

» **FirstService Financial** – This affiliate company develops short- and long-term strategies to address our communities' financial needs, ranging from banking and investments to financing alternatives and insurance. And, because of our powerful relationships with numerous financial institutions, we're able to secure preferred rates and lower fees for our communities.

"We manage \$5 billion in assets and over \$1 billion in lending. So, we're able to get preferred rates. But beyond that, we have subject-matter experts at our fingertips to help guide associations in lending and financing opportunities. The depth of experience, resources and benefits of working with FirstService Financial cannot be overstated."

— Robert Smith, president at FirstService Residential Florida

» **Quality Assurance** – This program is built on a scoring system which measures safety, cleanliness, maintenance or whatever a particular community wants to quantify from a quality perspective. Then we create assessments and score them against industry standards. The results are presented to the community management team and board to demonstrate where processes and procedures are working well and where improvement is needed.

"We use this program right from the start so we can show communities where they were on day one, and then all the upgrades and progress that has been made over a period of time. It has become a very powerful program for us and our boards."

— Robert Smith, president at FirstService Residential Florida

» **Hospitality/Front Desk** – Our Hospitality Program is designed to assist our communities with developing a service-based mindset which exceeds the expectations of the most sophisticated residents. Its purpose is to train around the concept of what good looks like from a hospitality standpoint, and address everything from presentation and conduct to standardizing uniforms. The program is managed with a scoring system, and even includes surprise visits.

"Hospitality is a very client-facing component that comes down to great customer service. Our Connect

software plays a big role in its successful execution. It begins with the front desk and encompasses many different elements such as package tracking, concierge, standard operating procedures and security.”

— Scott Bresnick, regional vice president of operations at FirstService Residential

- » **Lifestyle Programming** – This FirstService Residential resource involves all the events and programs that we plan and execute for residents in our communities such as ice cream socials, arts and crafts, residents clubs, concerts, fitness programs, resident newsletters and even virtual events. Lifestyle programming incorporates the culture of the community and works in concert with lifestyle operations to support the programming — reserving pickle ball courts, setting up the clubhouse and preparing other facilities and amenities.

“Many other community management companies leave the planning and execution of activities and events to their boards or they don’t have best practices to execute against. At FirstService Residential, we take on the role by connecting lifestyle programming directly to the culture of the community and execute our proven best practices against that.”

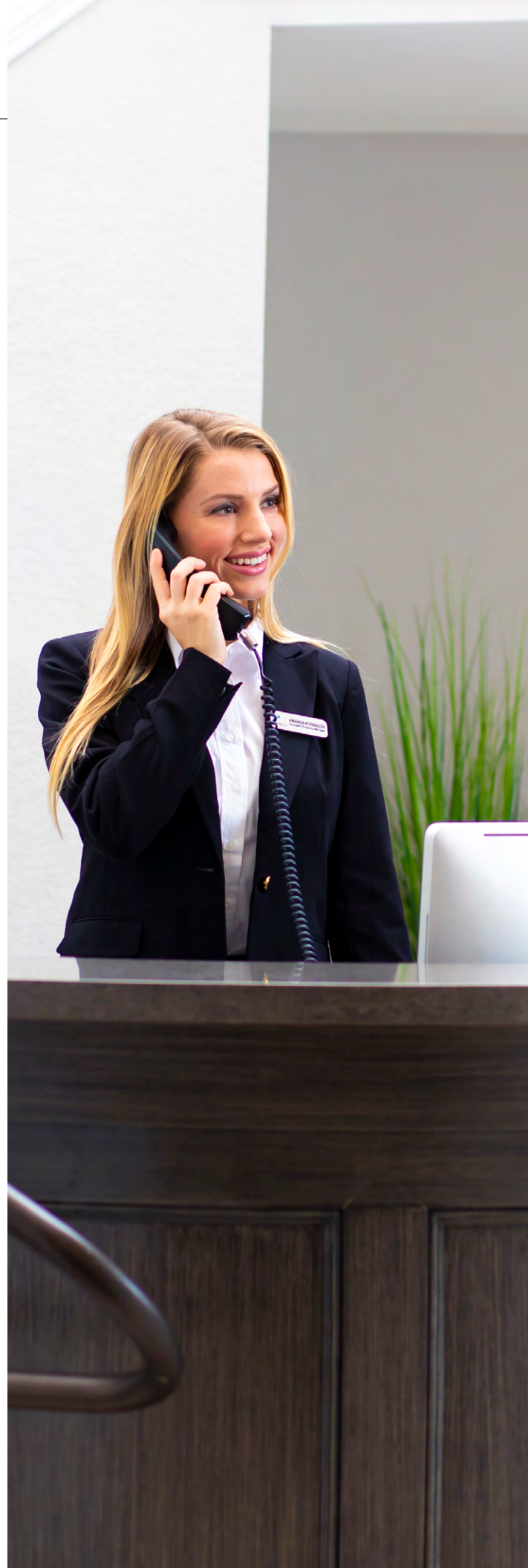
— Robert Smith, president at FirstService Residential Florida

- » **Preventive Maintenance** – This program establishes the standards, procedures and schedules that are necessary to properly maintain and maximize the lifespan of common area components throughout our communities. It identifies when to perform specific tasks such as cleaning the carpets, flushing cooling towers, ordering air filters, etc.

“FirstService Residential brings a lot of expertise to the table. We know when and how to order light bulbs and keep them ordered. We know how to refurbish clubhouse furniture. We know how to put maintenance schedules in place. That level of expertise is not easy to find.”

— Scott Bresnick, regional vice president of operations at FirstService Residential

**Please consult with your FirstService Residential community manager to learn more about the value-added, ancillary resources available in your area.*



How You Benefit from Our Local Expertise



We know from our experience that everything your property needs should be local and within easy reach. That's why we have purposefully structured our service delivery system so that your community manager and fellow board members like you have access to decision-makers who are right there, on the ground, in your area.

Werny captures the corporate structure this way: "When boards work with us, they enjoy the small company feel, but benefit from a big company's backing. We have all the resources they need right there where they are, but we also have this expansive breadth of services that no one else can offer. Ultimately, you're getting the best of both worlds."

FirstService Residential is also uniquely able to directly address most any challenge because by virtue of our size, we've seen it all. So as issues arise, regions share information with each other to tackle problems and uncover effective solutions. Here are three good examples of this:

» As previously mentioned, when New York was the epicenter of COVID-19 last spring, an executive team was established there that initially met virtually seven days a week to review guidelines and information being issued by the Center for Disease Control, the World Health Organization and the New York Department of Health — as well as guidance from our

corporate counsel. Its purpose was to stay on top of best practices and protocols to ensure our properties were ahead of the game instead of lagging behind. Our successes were regularly shared throughout the organization in order to help the other FirstService Residential regions better prepare the pandemic's eventual spread.

- » A high-rise building in Reno, Nevada had a pet park on the 10th floor that began leaking. The community manager reached out to three other FirstService Residential high-rise properties that had pet parks on upper floors and they shared what they did from a maintenance standpoint to prevent leaks. This enabled the community manager to quickly fix the problem.
- » Establishing electric vehicle stations at one of our largest properties in Florida was becoming a challenge for the team located there. They reached out to fellow associates in California who shared their years of experience with electric vehicle stations and best practices. With their feedback and guidance, the Florida team was able to develop and execute a viable installation plan.

By leveraging our relationships across North America, FirstService Residential can make a huge, positive difference for the communities and boards we serve — a difference that is experienced locally.



We hope this guide has reinforced for you the many ways which you, as a board member, can gain local access to the exclusive services and value-added, optional resources that are available to you and come with partnering with FirstService Residential as your trusted association management company. And, we sincerely hope you'll take advantage of them as you work for the continued betterment of your community.

If you have questions about any of the resources available to FirstService Residential-managed communities, contact us today.



About FirstService Residential

FirstService Residential is North America's association management leader, partnering with 8,500 communities across the U.S. and Canada. HOAs, community associations, condos and strata corporations rely on our extensive experience, resources and local expertise to maximize their property values and enhance their residents' lifestyles. Dedicated to making a difference, every day, we go above and beyond to deliver exceptional service.

FirstService Residential is a subsidiary of FirstService Corporation (FSV), a North American leader in the property services sector. Find out how we can help your community thrive. Visit www.fsresidential.com.

