

Your Community Name Here

Community Association Management Request for Proposal

Date:

Requested by:

[Enter Board Members Names]

Evaluation Criteria

The answers to the following questions will be used to evaluate the services offered by your company as it relates to providing professional management to [Insert Community Name].

Ability to Perform

	Supplier Response
Business name and headquarters address	
Number of years in business	
Is business or parent publicly traded?	
Full legal name of parent or holding company, if any	
Does the management company carry errors & omissions insurance? What is the policy limit?	
Provide company mission or principles	
Member of the BBB?	
What is minimum length of agreement?	
How many days' notice is required for termination by either party?	

Quality

	Supplier Response
Provide total number of properties currently managed	
Provide breakdown of types of properties managed, by percentage. Include: single family homes, condos, town homes, leased, etc.	
What continuing education is provided to managers and other staff members?	
How are service providers screened?	
Are there any companies related to your firm that will provide services to the associations?	
Please describe your mechanism for logging, tracking and responding to concerns from the board or from the homeowners	
Amount of time needed to complete transition from previous supplier?	
What transition activities are anticipated?	
Please Provide 3 Community References Below	

Administrative Services

	Supplier Response
Arrange, schedule and attend annual, organization and board meetings?	
Prepare documentation for board meeting agendas, management reports, and meeting minutes?	
Describe how you handle on-site amenity reservations (Community Meeting Rooms, Park Shelters, etc.), including keys/access codes.	
Maintain files, records and minute book for the association?	
Describe process used to collect association mail and how to distribute critical items to board members.	
Post minutes, announcements, notices, newsletters to website?	
Preparation and presentation of administrative reports and business correspondence?	
How soon are calls returned?	
How soon are emails returned?	
How are after-hours calls handled (i.e. pager, answering service, etc.)?	
How are emergency calls handled?	
How are after-hours calls handled (i.e. pager, answering service, etc.)?	
How are emergency calls handled?	

What are preferred methods of communicating with homeowners?	
How is correspondence with homeowners logged and filed?	
Does supplier provide a website or customer portal for homeowners?	
Does supplier provide a separate website or portal for board members?	
Does supplier provide newsletter services?	
Provide third-party contract administration?	
Process and coordinate ACC requests?	
What is process for repeat deed restriction violations at the same location?	
What is process for interacting with Board and Committee members on day- to-day types of concerns?	
What is included in welcome package?	
Review and recommend modifications to HOA documents to meet current needs? (i.e. bylaws, resolutions, etc.)	

Financial Services

	Supplier Response
Who performs financial management?	
Describe the credentials of the accountant and/or accounting staff	
Does the same accountant or staff person handle the day-to-day financial data?	
Are financial statements reviewed prior to submission to the board?	
List accounting software used in preparation of HOA financials	
On what date each month are financial reports completed and provided to the board?	
Are financial reports electronically archived and delivered to the board?	
List financial reports produced on a monthly basis	
List financial reports produced on an annual basis	
What bank is used?	
Any monthly bank charges for association accounts?	
Monthly reconciliation of all bank accounts?	
Are invoices paid at net 30 or longer?	
Invoice backup provided (i.e. receipts, etc.)?	

Any invoice threshold for board approval?	
Monitor expenses for unexplained increases?	
Monthly schedule of accounts payable provided?	
What methods are available for collecting assessments and water bill payments? (i.e. lockbox, manually, ACH, credit card)	
Capable of collecting bi-monthly, quarterly/annual assessments?	
What is process for handling delinquent accounts?	
Monthly delinquency report provided?	
Budget creation for operational and reserve?	
When is annual budget required to be completed?	

Costs

	Supplier Response
Setup Charge	
What are minimum monthly service fees?	
What are optional services and corresponding fees	
Costs for printing and mailing letter, flyer, and postcard	
Provide a detailed list of any and all additional charges which have not already been provided herein.	

Innovation

The following questions are designed to get a unique perspective from the management company about why they feel they are the right choice for your community.

Describe why your company is right for our community.
What makes your company unique among other property management providers?
Anything else you would like to share about your company?

Additional Enclosures

Please let us know what else may be enclosed with this RFP for board review.

Document	Included
Certification of Insurance	
Management Agreement	