

# Association Management Services Request for Proposal

Association name: \_\_\_\_\_

Association address: \_\_\_\_\_

## Property Details

Number of units: \_\_\_\_\_ Number of ponds: \_\_\_\_\_ Number of fountains: \_\_\_\_\_

Clubhouse: \_\_\_\_\_ Swimming pool: \_\_\_\_\_ Fitness center: \_\_\_\_\_

Phone: \_\_\_\_\_ Cable: \_\_\_\_\_ Internet: \_\_\_\_\_

Irrigation: \_\_\_\_\_ Landscape lights: \_\_\_\_\_ Tennis courts: \_\_\_\_\_

Access control: \_\_\_\_\_ Pet waste stations: \_\_\_\_\_ Laundry facility: \_\_\_\_\_

Elevators: \_\_\_\_\_ Private trash service: \_\_\_\_\_ Towing: \_\_\_\_\_

Security: \_\_\_\_\_ Automobile gates: \_\_\_\_\_ Carports: \_\_\_\_\_

Parks and park features: \_\_\_\_\_

Other: \_\_\_\_\_

## Administration

Number of board meetings per year: \_\_\_\_\_

Who creates the agenda: \_\_\_\_\_ Who drafts the minutes: \_\_\_\_\_

Newsletter generation: \_\_\_\_\_

Website administration: \_\_\_\_\_

On-site staffing: \_\_\_\_\_

\_\_\_\_\_

Architectural modification process: \_\_\_\_\_

Other: \_\_\_\_\_

## Financial

How often are dues paid: \_\_\_\_\_ Statements or coupon books: \_\_\_\_\_

Does each unit pay the same dues: \_\_\_\_\_ Is water sub-metered: \_\_\_\_\_

Current ways dues can be paid: \_\_\_\_\_

Collections process: \_\_\_\_\_

Who prepares the budget: \_\_\_\_\_ Do you have a reserve study: \_\_\_\_\_

Other: \_\_\_\_\_

## Asset Management

How often do you want a property inspection: \_\_\_\_\_

How often do you want a compliance inspection: \_\_\_\_\_

What projects need to be completed this year: \_\_\_\_\_

\_\_\_\_\_

What projects need to be completed next year: \_\_\_\_\_

\_\_\_\_\_

Competitive bidding required above what cost: \_\_\_\_\_

Other: \_\_\_\_\_

## Current Information

How satisfied are you with the condition of the property: \_\_\_\_\_

What are the three biggest issues you are trying to solve by changing management companies: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Timeline

site meeting with prospective management companies: \_\_\_\_\_

Proposals and management agreements to be received: \_\_\_\_\_

Presentation with the Board: \_\_\_\_\_

Final decision: \_\_\_\_\_

Start date for new management company: \_\_\_\_\_

## Management Company Questions

How long have you been in business: \_\_\_\_\_

What percentage of your business is association management: \_\_\_\_\_

How many association's do you manage: \_\_\_\_\_

What size associations do you manage: \_\_\_\_\_

Of our assets, what do you have experience working with? \_\_\_\_\_

\_\_\_\_\_

Will we have a designated association manager: \_\_\_\_\_

Does our manager have any CAI credentials: \_\_\_\_\_

How many properties will our manager be managing: \_\_\_\_\_

How many meetings will our manager have per week: \_\_\_\_\_

How and when do financial statements get distributed to the Board: \_\_\_\_\_

Who answers resident phone calls: \_\_\_\_\_

Do you provide emergency services: \_\_\_\_\_

Do you employ maintenance technicians: \_\_\_\_\_

Do you have resident and board online portals: \_\_\_\_\_