

**REQUEST FOR PROPOSALS
FOR
COMMUNITY MANAGEMENT
SERVICES**

**Southern Views at South
Mountain Homeowners
Association, Inc.**

REQUEST FOR PROPOSALS

HOA MANAGEMENT

Issued 4/03/18

Southern Views at South Mountain Homeowners Association, Inc.

NOTICE of REQUEST FOR PROPOSALS –

Community Association Management Services

Southern Views at South Mountain Homeowners Association, Inc. (HOA) is seeking proposals from qualified Arizona licensed professionals for Community Association Management Services.

Request for Proposal packages may be downloaded from the Trellis website: <http://www.trellisaz.org> or by emailing Caroline Cancel: ccancel@trellisaz.org

Proposals will be received until: 4:00 P.M. 04/25/2018.

Proposals may be mailed to:

Trellis (Attn: Caroline Cancel – re: CMA – RFP), 1405 E. McDowell Rd., Phoenix, AZ 85006 or delivered in a sealed envelope to:

Southern Views at South Mountain HOA – Attn: Caroline Cancel, 1405 E. McDowell Rd., Phoenix, AZ 85006, with the understanding that materials must be in hand by 4:00 P.M. 04/25/2018. Proposals received after that time and date will be considered non-responsive and will be returned unopened.

Please contact Caroline Cancel at ccancel@trellisaz.org or 602-424-5346 for additional information regarding this solicitation.

The Southern Views at South Mountain HOA Board of Directors reserves the right to reject any or all proposals, to waive or decline to waive irregularities in any proposal, or to withhold the award for any reason it may determine and also reserves the right to hold any or all proposals for a period of thirty days after the required date of receipt. No proposer may withdraw their proposal during this thirty-day period.

Southern Views at South Mountain HOA

Patricia Garcia Duarte, President

1405 E. McDowell Rd.

Phoenix, AZ 85006

The client

Southern Views at South Mountain Homeowners Association, an Arizona non-profit corporation, (herein-after called the "Association") is accepting proposals for community management services of Southern Views at South Mountain (now known as Montana Bella). Montana Bella is a gated community located five miles from downtown Phoenix in the South Mountain Village Community. Trellis (a non-profit corporation and developer) acquired the subdivision at a Trustee's Sale on 2/23/09 and acquired 18 vacant lots and 16 partially-built single family homes (10 homes were previously completed and had been sold, for a total of 44 lots upon build out). Trellis then completed construction of the 16 partially-built homes between June 2009 and December 2011. Fourteen of those homes were sold to buyers, and two were kept as rental properties. As of April 1, 2018, Trellis has completed the remaining 18 lots and just sold the last 3 with the model home remaining to be sold. Its HOA fees are \$85.00 a lot and its 2015 operating budget is \$45,000.

Common area includes an approximate $\frac{3}{4}$ acre open grass landscaped area in center of subdivision with ramada and playground equipment, private streets and landscaping around perimeter. The Board will provide strategy and high level management. The manager should act in the best interests of the association and the neighborhood, at all times. The manager should remember they are representing the Board in everything they do and should have the highest standards for customer service. They should do everything possible to make our neighbors feel good about living in Montana Bella. Of course the little things, like sending out bills and handling architectural review requests, should be handled flawlessly. Our ideal manager would be the first person we turn to as we strive to make Montana Bella the very best place to live.

PURPOSE

The purpose of the Community Association Management Company is to ensure smooth operation and maintenance of all of the Association's business affairs. This includes, but is not limited to: attending and preparing all agendas and meeting minutes for all Association meetings; managing all association finances, including annual dues collection and budget preparation; conducting property inspections for CC&R's violations; operation and management of the common area; improvements; and financial affairs of the Association.

The objectives of this request for proposals are three-fold:

1. To ensure, through open competition, that the members of the Association are provided with the best management services possible;
2. To ensure, through open competition, that the members of the Association are provided with the best pricing for these management services;
3. To continually review and improve, as necessary, the scope of these services.

SCHEDULE OF PROPOSAL DEADLINES

Advertise for Services: April 3, 2018

Proposals Due: 4:00 P.M. April 25, 2018

Begin Contract Period: May 1, 2018

SCOPE of Management Services

GENERAL

A. Regulatory Requirements:

1. The Management Company is responsible for complying with all Federal, State, and Municipal requirements affecting contracted property management services.
2. The Management Company is responsible for knowledge of the CC&R's, development declarations and conditions, bylaws, rules and regulations, compliance guidelines and architectural standards of the Association.
3. The Management Company is responsible for enforcing document provisions.
4. The Management Company is responsible for filing annual permits, registrations, insurance applications, tax documents and handling of claims.
5. The Management Company shall have at least one individual with training in community association management, have a program for continuing education, and have no documented record of misconduct.

B. Clear Designation/Disclosure:

1. Names of Corporate/personal entities;
2. Disclosure of management relationship with subcontractors/service providers;
3. Identification of management company designated representative(s) for the HOA and to the board.

C. Professional Responsibilities

1. Provide access for legal clarifications
2. Maintain current insurance for both Management Company and the HOA.

HOA SPECIFIC

D. Management Responsibilities:

1. Maintain files;
2. Production of Board Packets;
 - a. Standard items in packets include: Meeting Agendas, Property Manager's Report, Minutes, Financials, Old Business issues, New Business items, Homeowner letters, Executive session issues, i.e. financial or violations issues.
 - b. Identify any special items, not listed above, that your firm routinely or occasionally includes in board packets.
3. Services to be provided at Meetings;
4. Maintenance and Property Inspections;
5. Communication with Owners and Residents;
6. Emergencies.

E. Accounting Responsibilities

1. Monthly Statements of Financial Records;
2. Promptly and responsibly manage Funds/Deposits/Savings and Checking accounts Reserves / Collections/Disbursements and pay obligations;
3. Annual Budget/Corporate reports/Corporate taxes;
4. Audit by independent company.

INSTRUCTIONS TO PROPOSERS

A. GENERAL

All proposals should follow the format and sequence described in the paragraphs on Technical Proposals and Fee of this RFP; to allow a standard basis for evaluation. Failure to follow the instructions regarding format may result in rejection of the proposal.

B. MINIMUM QUALIFICATIONS

Proposals will only be considered from firms with individuals who are currently registered professional Brokers through the State of Arizona Real Estate Department. Firms with any current documented misconduct will be disqualified.

C. FORM OF PROPOSAL

Proposals shall consist of a Technical Proposal and a Fee Proposal.

The Technical Proposal should display clearly and accurately the capability, knowledge, and capacity of the proposer to meet the technical requirements of this RFP. Five (5) copies of the Technical Proposal are required.

One (1) copy of the Fee Proposal is required. The Fee Proposal should detail cost information, including a listing of all base and additional services to be performed and a breakout of unit costs for those services and their components. For evaluation purposes, in addition to the unit prices requested above, please include a Lump Sum, per month, fee proposal which includes identification of the services included.

D. INTERVIEWS

Proposers may be requested to participate in one interview with the HOA Board of Directors.

Interviews will be conducted for a maximum of 60 minutes as follows:

10-20 minutes: Proposer shall enhance or clarify the Technical Proposal information for the Board of Directors

10-40 minutes: Board of Directors question and answer time.

E. FORM AND EXECUTION OF CONTRACT

It is expected that the HOA and the selected firm will enter into a contract for services not later than the week of April 30, 2018. The contract period is anticipated to be for one year, renewed annually, contingent upon any request for fee changes and negotiations.

TECHNICAL PROPOSAL ORGANIZATION

The Board of Directors of the HOA will evaluate firms proposing in response to this RFP based on the information provided in the Technical Proposal and interviews as necessary. The proposals should be organized in six main sections according to the following outline:

Cover:

The cover should contain the following relevant data as a minimum: Technical Proposal In Response To Southern Views at South Mountain HOA, Inc., Request for Proposals for Community Association Management Services, submittal date, company name.

Title Page:

(One page maximum)

Include Firm's name, address, email, website, phone and FAX numbers, name(s) of Principals/qualifying Broker party and license number (if applicable).

Executive Summary:

(Two pages maximum - 5 Pts)

Address issues of experience, number of relevant office personnel by special qualifications; ability to keep community association management projects on schedule and within budget; and local availability.

SECTION 1.) Property Management Experience:

(Two pages maximum - 30 pts)

In a narrative format discuss similar community association management experiences. Provide examples of on-going contracts from the past five years. Identify overall years of experience. Highlight problems/obstacles encountered and solutions/resolutions achieved. Identify the ways in which your firm excels in this area of work.

SECTION 2.) Standard Operating Procedures (SOP):

(Two pages maximum – 25 pts)

Include standard operating procedures (SOP) used by your firm to perform the technical services offered. Describe any quality control techniques utilized by your firm to insure client satisfaction.

SECTION 3.) Project Team:

(Two pages maximum plus, provide a maximum of three single sheet resumes as relevant – 10 pts).

Identify the key personnel and responsibilities for those members of your firm who will be assigned to this contract.

SECTION 4.) Financial Statement (10 pts)

A. Provide a current financial statement for your firm.

SECTION 5.) OTHER INFORMATION

(Three pages maximum – 20 pts)

A. Firm may provide other pertinent information it deems appropriate to confirm its qualifications for this work. Photographs, awards, and letters of reference, pricing discounts/incentives are types of information that might be considered desirable.

FEE PROPOSAL ORGANIZATION

(Two pages maximum)

A. Provide a listing of all required base services, with a breakout of unit costs.

B. Provide a listing of any additional services with a listing of unit costs.

C. Provide a Lump Sum monthly service fee. Provide with the Lump Sum fee a clear identification of all included base and additional services.