Request for Proposal (RFP): Community Association Management Services

[Insert Community Name]

Issue Date: [Insert Date]  
Proposal Due Date: [Insert Date]  
Contact for Questions: [Insert Name / Email / Phone]

## 1. Introduction

[Your HOA Name] (“the Association”) is a homeowners association seeking proposals from qualified Community Association Management Firms (“the Vendor” or “the Management Company”) to provide comprehensive management services for our residential community located in [City/State].

This is the Association’s first time engaging a professional management company, and the purpose of this RFP is to explore available services, pricing models, and vendor capabilities that can best support the Association’s governance, financial, and operational needs. The Association encourages creative and flexible proposals that address the broad scope of potential management needs, as well as suggestions for optimizing community operations.

## 2. Background Information

* Community Name: [Insert Name]
* Location: [City, State]
* Number of Homes/Lots: [Insert Number]
* Common Areas/Amenities: [List briefly – e.g., clubhouse, pool, walking paths, retention ponds, playgrounds, etc.]
* Governing Documents: [Covenants, Conditions & Restrictions (CC&Rs), Bylaws, Rules & Regulations]

The community is governed by a volunteer Board of Directors. The Board currently handles administrative, financial, and vendor management functions in-house and is seeking to transition to a professional management structure to improve efficiency, compliance, and homeowner satisfaction.

## 3. Objectives of This RFP

The Association seeks to:

* Identify qualified management companies with strong experience in HOA governance and operations.
* Understand the range of services, technologies, and management models available.
* Receive recommendations for an appropriate scope of engagement and cost structure based on the Association’s size and needs.
* Establish a partnership with a management firm that can grow with the community.

## 4. Scope of Services (Broad Discovery Areas)

Vendors should propose services they believe appropriate for an HOA of our size and structure. The Association welcomes modular service offerings (e.g., financial-only, full-service, or hybrid options). Proposals should address, but not be limited to, the following categories:

### A. Administrative & Governance Support

* Board and annual meeting facilitation, agenda preparation, and minute recording.
* Document storage, homeowner communication, and official recordkeeping.
* Election management and compliance with state HOA regulations.
* Policy and rules enforcement processes.

### B. Financial Management

* Budget preparation and forecasting.
* Assessment billing, collection, and delinquency management.
* Monthly financial statements and reserve tracking.
* Banking and audit support.
* Online payment and owner portal options.

### C. Vendor & Contract Management

* Soliciting and managing maintenance, landscaping, insurance, and repair vendors.
* Oversight of service-level agreements and performance metrics.
* Coordination of community projects and capital improvements.

### D. Maintenance Coordination

* Routine inspections of common areas and amenities.
* Preventative maintenance planning and documentation.
* Emergency repair response protocols.

### E. Communication & Homeowner Engagement

* Homeowner inquiries and complaint management.
* Newsletter, website, or mobile app management (if offered).
* Recommendations for improved communication channels.

### F. Technology & Reporting

* Software platforms for accounting, communications, and document management.
* Online homeowner portals and mobile access.
* Reporting dashboards and transparency tools for the Board.

## 5. Vendor Qualifications

Please provide the following:

* Company Overview: Years in business, ownership structure, service area, and staff count.
* Relevant Experience: Number and type of HOAs currently managed (size, complexity, amenities).
* Key Personnel: Names, titles, and experience of assigned community manager(s).
* Insurance Coverage: Provide proof of professional liability and general liability.
* References: Minimum of three (3) current or former HOA clients.

## 6. Proposal Requirements

Proposals should include:

* A detailed scope of proposed services, including optional or tiered service levels.
* Pricing structure — indicate all fees (management, administrative, pass-through, etc.).
* Implementation plan and timeline for onboarding a new client.
* Technology overview — describe tools or software used for financials, communication, and reporting.
* Value-added services or differentiators.
* Sample management agreement or contract template.

## 7. Evaluation Criteria

Proposals will be evaluated based on:

* Understanding of HOA management needs.
* Experience and qualifications of assigned personnel.
* Service breadth and flexibility.
* Cost structure and value.
* Technology capabilities.
* References and demonstrated performance.

The Association reserves the right to negotiate with any or all vendors, to reject any or all proposals, and to accept the proposal deemed most advantageous.

## 8. Timeline (Tentative)

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| --- | --- |
| Milestone | Date |
| RFP Issued | [Insert Date] |
| Vendor Questions Due | [Insert Date] |
| Proposals Due | [Insert Date] |
| Vendor Interviews (if applicable) | [Insert Date] |
| Selection and Notification | [Insert Date] |
| Contract Start Date | [Insert Date] |

## 9. Submission Instructions

Please submit your proposal electronically (PDF format) to:  
Contact Name: [Insert Contact Name]  
Email: [Insert Email Address]  
Subject Line: HOA Management RFP – [Company Name]  
  
All submissions must be received by [Due Date] to be considered.

## 10. Additional Notes

This RFP is intended to promote discovery and collaboration between the Association and potential management firms. Vendors are encouraged to include consultative recommendations regarding best practices, service levels, and governance structure.