

## **Introduction**

Fawn Ridge Maintenance Association is seeking responses from qualified management companies to assume the management responsibilities for the community of 682 homes. The Fawn Ridge HOA is a very active Association with an energetic board of directors and architectural committee who take a hands-on approach to running the community. We are seeking a professional and flexible management company able to work with the Association team in maintaining the community and managing finances and violation processes as per our HOA policies. The Association is currently managed by NewGuage and the board is seeking information on other companies and other company offerings to see what would be the best fit for this community.

## **Instructions**

Please fill out all attached forms and add additional information where necessary. Additional brochures or proposals are welcome, however any information in electronic format is preferred.

## **Due Date:**

The Association will require all submissions to be sent to the Board of Directors at [BoardofDirectors@fawnridge.org](mailto:BoardofDirectors@fawnridge.org) or to be submitted by mail to Fawn Ridge HOA , 8945 Eastman Dr,, Tampa, Fl, 33626 no later than \_\_\_13 april\_\_\_\_\_, 2022.

## **Decision Date:**

The Association will be reviewing all responses and then looking to discuss in the following board meeting to be conducted at or around \_\_April\_\_\_\_, 2022. The Board would expect to make a decision around this time.

## **Vendor Information**

Company Name: Resource Property  
Management

Address: 7300 Park Street North,  
Seminole Florida 33777

Contact: Al Freda

Telephone: (727) 581-2662

Email: [afreda@resourcepropertymgmt.com](mailto:afreda@resourcepropertymgmt.com)

## Management Company Request for Proposal

1.0 Company Background		
1.1	Number of years in business	30 Years
1.2	Number of Employees & Local Employees	400 Employees Local
1.3	List 3 other local communities being managed	<a href="#">Click here to enter text.</a>
1.4	Company Website	<a href="http://resourcepropertymgmt.com">resourcepropertymgmt.com</a>
1.5		

2.0 Violation Processing		
2.1	Does Company provide a deed restrictions violation review service of community properties?	Yes
2.2	What is the frequency of Review?	Per Board direction
2.3	Are Pictures taken during the review process with time & date stamps?	Yes
2.4	How are violations tracked?	Via One Source management portal
2.5	How are violations reported to the Association?	Via One Source management portal
2.6	Does the company maintain a violation history by property?	Yes
2.7	Does the company allow association to customize violation letter content?	Yes
2.8	What is the cost to the association for each violation notice?	No cost
2.9	How are Attorney Escalations tracked? Do they have a unique case number? How is status maintained and updated to the association?	Via One Source management portal. Legal issues are typically a "Board Only " feature. Case numbers are not assigned. Updates are provided in One Source.
2.10	Does property manager patrol neighborhood in marked or unmarked vehicle?	Unmarked
2.11	Association has a violation policy with respect to type of violation and timeframes for response and escalation. Does the Company allow for flexibility in processing of Violations?	Need to Review

Provide details on any other Violation services offered:

[Click here to enter text.](#)

## Management Company Request for Proposal

3.0 Resident Services		
3.1	Does the company provide a 7/24 hotline for residents?	Yes. Emergencies are handled after hours by an on call manager.
3.2		<input type="text"/>
3.3	Is there a dedicated property manager assigned? (single point of contact for the HOA)	Yes <input type="text"/>
3.4	What percentage of units would Fawn Ridge account for in their portfolio?	<input type="text"/> Depends on the manager selected. Typically, a manager with a larger property would have a smaller portfolio.
3.5	Does Company Provide a community website page for residents? If Yes; Does this provide secure login for residents to view their account information?	Yes  Yes
3.6	Does the Company Provide a Secured Website for Board & Community business	Yes
3.7	Can documents / information be posted to websites by Association?	Yes
3.8	Does the company provide community meeting facilities? If Yes; How many people can they accommodate?	No <input type="text"/>
3.9	Access to Information: Fawn Ridge has an Access to Information Policy. Where are community documents stored?	Local Office Electronically Third Party Storage
3.10	Is there a charge or restrictions for residents to view public access documents? Please specify	If records are not available online, then access will be provided per FS 720

Please List any other services provided to residents:

Please see attached brochure

Please List any other services provided to Board / Committees

Please see attached brochure

4.0 Architectural Applications		
4.1	How are architectural applications submitted by residents?	Email, Mail or One Source online portal
4.2	What is the cost / submission to the Association	No cost
4.3	How do residents submit payment for Architectural Applications?	Check
4.4	Is there a service fee for electronic payment and if so how much?	N/A
4.5	Is the architectural application customizable by association?	Yes
4.6	How are applications conveyed to the Architectural committee?	Email or One Source
4.7	What is the turnaround time to provide applications to the Architectural Committee once received by property management?	1-2 days depending on the requirements of the association.
4.8	Fawn Ridge HOA has a color booklet for approved colors. Will the management company provide access to this booklet to residents? List access times and any restrictions such as call ahead that are required.	We will provide access during business hours, 9:00 am- 12:00 pm and 1:00 pm -5:00 pm, Monday through Friday.

Please List any other architectural services provided to residents or board:

[Click here to enter text.](#)

## Management Company Request for Proposal

5.0 Financial Handling		
5.1	Is there a specific financial institution that is used by the Management Company or is the Association free to use its own financial institution?	Popular Bank for the lock box and operating account.
5.2	How can residents submit payments for association fees? (Check all that apply)	ACH, Coupon/Check, Credit Card
5.3	Is there a service fee for electronic payment and if so how much?	\$1.99 for e-checks, 3.25% for credit cards (third party fee)
5.4	What is the payment process for contracted vendors and recurring payments? Does the management company pay all invoices or is the treasurer required to authorize monthly payments?	Invoices are sent directly to our office for approval by the manager. Once approved, Invoices paid through our accounting office. The treasurer may authorize payment through our online A/P system if the Board chooses.
5.5	What is the payment process for other non-recurring payments & Invoices? How are payments authorized?	See above
5.6	How are financial statements provided to the HOA?	Financials are uploaded to One Source upon completion.
5.7	Fawn Ridge HOA has a specific collection policy for assessments. Is the management company able to incorporate this policy?	Probably, but we need to review the policy.

6.0 Management Costs		
6.1	Please provide Standard Annual Costs	More information is required before we can provide a proposal. We recommend a meeting to discuss in detail the needs of the community
6.2	Please Lists all ancillary Management Costs	See attached Appendix A

Management Company Request for Proposal

6.3	Pleases List Fees & Consumable Costs Photocopies General Membership Notifications Violation Letters Pre-Lien Notice FAX Cost / Page Other	See attached Appendix A
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We certify the information provided in this proposal to be true and accurate.

Signature: *Alberto Freda*\_\_\_\_\_

Name: Alberto Freda\_\_\_\_\_

Date: 4-13-2022\_\_\_\_\_