

TENDER: MANAGEMENT COMPANY FOR A NEW CONDOMINIUM

Issued by the developer before turnover. Have your attorney read it before you send it.

Project and address:

Developer:

Number of units:

Planned handover date:

Contact for questions and offers:

Deadline for offers:

Date issued:

Principles of this tender

1. The manager works for the owners' association. It is chosen to be kept by the owners, not to be replaced at their first meeting.
2. The contract term and the owners' right to end it stay within what the law allows, and bidders must accept that.
3. Every fee is itemized and can be shown to buyers before they sign.
4. The manager takes over the common parts and the technical documents in a signed protocol, and keeps the list of open defects with deadlines.
5. The bidder declares any link to the developer and to the people deciding for the owners.

How to bid

1. Answer every question. Write "not offered" instead of leaving a line empty.
2. Send your offer to the contact above by the deadline.
3. Attach a sample contract, your insurance certificate and the license or certificate that applies to you.
4. Offers are scored on the criteria and weights below, with independence from the developer weighted highest.
5. The developer keeps all offers confidential and shares the shortlist with the first owners' meeting.

Turnover and cancellation

1. You accept that a contract made before the owners take control may be canceled by the owners other than the developer on the terms of s. 718.302.
2. You will support turnover under s. 718.301(4): the transfer of the association's records, funds, contracts and warranties listed there.
3. State the community association management firm license number and the license number of the manager you will assign to the building (s. 468.432).

Independence (25 %)

Question	Bidder's answer	Score (owners)
Do you declare in writing any ownership, financial or family link to the developer, the sellers of units or the people making decisions on behalf of the owners?		
Is the contract term within what the law allows, and can the owners end it on notice without a penalty?		
Will you disclose when you give work to companies that you or the developer own?		

Credentials and compliance (10 %)

Question	Bidder's answer	Score (owners)
Do you and the person who will run our building hold the license or certificate that applies where we are (if any), and will you show us the number?		
Do you carry professional liability and fidelity (crime) insurance, and will you show us the certificate?		
Are you a member of a professional association with a code of conduct that owners can read?		

Money handling (20 %)

Question	Bidder's answer	Score (owners)
Will our building's money be kept in a separate account in the association's name, never mixed with your own funds?		
Will owners be able to see the bank statement and who owes what online, at any time? (digital, optional, half weight)		
Will you provide owners with a statement of income and spending every month, within a fixed number of days?		
Will the accounts be reviewed once a year by someone independent of you?		

Reporting and governance (10 %)

Question	Bidder's answer	Score (owners)
Will you deliver the annual budget and the year-end statement on time, in a form an owner can read?		
Will you keep a complete archive of minutes and resolutions that any owner can access?		
Will documents, minutes and contracts be kept in a portal for owners and the board instead of e-mail attachments? (digital, optional, half weight)		
Do you support online voting or remote participation in meetings, where the law allows? (digital, optional, half weight)		

Service and response (10 %)

Question	Bidder's answer	Score (owners)
Will you assign a named manager to our building, and how many buildings or units does that person run?		
Do you have a backup person and an out-of-hours route for burst pipes, elevators and power cuts?		
Will requests be logged with a reference number, and will the resident be able to see the status? (digital, optional, half weight)		
Will you report response and resolution times to the board every month?		

Handover readiness (15 %)

Question	Bidder's answer	Score (owners)
Will you take over the common parts, keys and technical documents from the developer or the previous manager in a signed protocol?		
Will you track defects and warranty claims with deadlines, and pursue them with the builder?		
Will you collect and keep the as-built drawings and the technical file of our building?		

Question	Bidder's answer	Score (owners)
Will owners be able to see the defects being worked on, with their status? (digital, optional, half weight)		

Price transparency (5 %)

Question	Bidder's answer	Score (owners)
Is your fee itemized, with what is included written down?		
Are extra charges and any percentage charged on major works stated up front, with no open-ended add-ons?		
Is the yearly increase tied to a stated index or cap, and will you show last year's actual workload so offers can be compared like for like?		

Proof (5 %)

Question	Bidder's answer	Score (owners)
Can you give references from buildings of a similar size and age, and say how many years you have been in business?		
Will you show us a live demo of what owners and residents actually see? (digital, optional, half weight)		
Do you know, and will you tell us, how many owners actually use online payment and the app? (digital, optional, half weight)		

Fees

Item	Amount	Notes
Monthly management fee		
Accounting and annual statement		
Handover and setup before owners move in		
Extra services (hourly rate)		
Share charged on major works		

Item	Amount	Notes
Yearly increase and its index		
Fee if the contract ends early		

How offers will be scored

1. Independence: 25 %
2. Credentials and compliance: 10 %
3. Money handling: 20 %
4. Reporting and governance: 10 %
5. Service and response: 10 %
6. Handover readiness: 15 %
7. Price transparency: 5 %
8. Proof: 5 %

Declaration of independence

- ☐ The bidder has no ownership, financial or family link to the developer, the sellers of units or the people deciding for the owners, except as listed below.
- ☐ The bidder will disclose in writing any contractor it gives work to in which it or the developer has an interest.
- ☐ Links to disclose (write "none" if there are none):

References

Building or client	Units and years under management	Contact
1		
2		
3		

For the developer (name, role, date)

For the bidder (name, role, date)

Signature

Signature

This template is general information, not legal advice. Statute references are to the Florida condominium act (Chapter 718) and the community association management act (Part VIII of Chapter 468). Have an attorney check it before you send it.