

REQUEST FOR PROPOSAL: COMMUNITY ASSOCIATION MANAGEMENT SERVICES

Condominium or homeowners' association. Have your attorney read it before you send it.

Association and building:

Address:

Number of units:

Current manager (if any):

Contact for questions and offers:

Deadline for offers:

Date issued:

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. Late offers may not be considered.
3. Attach a sample contract, your insurance certificate and the license or certificate that applies to you.
4. We compare offers on the criteria and weights below. The lowest price does not win by itself.
5. We collect at least three offers and share them only with the people deciding for the owners.

Florida condominium requirements

1. State the community association management firm license number and the license number of the manager you will assign to the building (s. 468.432).
2. Confirm that you will keep the official records so that members can inspect them, and provide them within 10 working days of a written request (s. 718.111(12)).
3. For a condominium with 25 or more units: confirm that you will run the association's website or app where the records in s. 718.111(12)(g) are posted.

Credentials and compliance (15 %)

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 (15 %)

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 (15 %)

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?		

Question	Bidder's answer	Score (owners)
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 (10 %)

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?		
Will owners be able to see the defects being worked on, with their status? (digital, optional, half weight)		

Independence (10 %)

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?		

Price transparency (10 %)

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?		

Question	Bidder's answer	Score (owners)
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		
Extra services (hourly rate)		
Share charged on major works		
Setup and takeover from the previous manager		
Yearly increase and its index		
Fee if the contract ends early		

How offers will be scored

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

7. Price transparency: 10 %
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 owners (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 against your declaration and bylaws before you send it.