

Request for Proposals
Rancho Viejo South Community Association

Overview:

Rancho Viejo South Association is a community of homeowners located in the County of Santa Fe within the greater development of Rancho Viejo. Rancho Viejo South Community Association was created pursuant to the New Mexico Corporations Act in August 1, 2002, and was established for the benefit of the homeowners, who are the members of the association. A Board of Directors, being duly elected to represent the members, is responsible for management of Association Property and oversight of Association revenues and expenses: obtaining management service necessary for the maintenance; operation, repair and replacement of the Property of the Association; establishing a yearly budget for the operation, care, upkeep and maintenance of all of the Property and services of the Association; establishing Rules and Regulations; enforcing the provisions of the Declaration, Bylaws and the Rules and Regulations and acting on behalf of the Owners.

Instructions:

Rancho Viejo South Community Association, which contains 574 homes including 58 townhomes over 1524 acres, is soliciting proposals for a management company to be our principal agent for the purposes of managing the community property; ; preparing billings on accounts, collecting remittances, depositing income and managing financial assets, providing accurate accounting and reporting of these financial accounts; recommending yearly budgets for expenditures on administrative expenses, contractual services, utilities, insurances, taxes and repair, replacement of community assets and income requirements; establishing procedures for the implementation of all policies, Rules, Regulations and oversight of the Declaration and Bylaws on behalf of the Board and the Owners. The term of the contract will be for a period of one (1) year with an option for a second year, beginning on January 1, 2009. All companies submitting proposals must address the specifications of this RFP in their presentation.

All proposals must be in writing to **R Thomas Berner, President, Rancho Viejo South Community Association, 6539 South Richards Avenue, Santa Fe, New Mexico 87508** and received no later than 5 p.m., on Saturday, October 11, 2008. All written proposals will be kept sealed until opened in the presence of an Association Board member at the Association office at a time to be determined by the Association Board. Proposals with incomplete information as required by the RFP will be rejected.

The Association Board anticipates selecting the winning bid no later than Tuesday, November 18, 2008. The Association Board reserves the right to reject any and all proposals if they believe to do so is in the best interest of the Association.

Proponents must provide:

- documentation of workers' compensation and insurance coverage,
- accord form showing levels of all insurance coverage,
- amount for which company is bonded,
- references from communities where services are currently being provided.

The Association states that the primary services expected of the Management Company are:

- Managing all aspects of Association office on behalf of Association members
- Performing routine examination of Association property and resident outside space to ensure compliance with the Community Charter and Covenants, Conditions and Restrictions and Architectural Guidelines
- Providing primary services to prepare, pay and monitor all aspects of Association budgeting, expense payment, fiscal reconciliation and audit
- Overseeing all aspects of effective control bid specifications, contractor engagement and contract monitoring
- Staffing all board, committee and member meetings engaged in Association business
- Managing member correspondence

All Proposals must include the following information:

- I. Name of Company
- II. Physical Address of Company
- III. Phone and Fax Number
- IV. E-Mail Address
- V. Name of Company Owner
- VI. Federal Tax Identification Number
- VII. Number of years in business
- VIII. Bonded
- IX. HOA references
- X. Number of Employees

XI. Financial institution providing loans or credit

The Association will accept proposals which meet the specifications listed below for all of the following services.

- I. Administrative Services**
- II. Financial Services**
- III. Physical Property Services**
- IV. Architectural Review Services**
- V. Support Services**
- VI. Property manager**
- VII. Cost proposal**
- VIII. Administrative Services**

- Organize monthly and Annual meetings of the Board of Directors of the Association, including preparation of notices, agendas and other necessary documents.
- Guide and assist members of the Board of Directors of the Association in the performance of their obligations.
- Guide and assist the Association in the development of policies and procedures.
- Advise and assist in the administration of the provisions of the governing documents.
- Keep all records of the affairs of the Association and the Board of Directors including the Declaration, Articles of Incorporation, Bylaws, Rules and Regulations, policies, minutes of meetings, copies of contracts, correspondence and other records belonging to the association.
- Maintain registers of Owners, Officers and Directors, vendors, contractors and such other registers or schedules as required by the governing documents.
- Attend to all necessary correspondence on behalf of the Association.
- Resolve individual Owner requests as they pertain to the administration of the association, its common elements and governing Rules and Regulations.
- Administer the Association's insurance portfolio including the filing of all claims.

I. Financial Services

- Provide primary assistance in development of the Annual Operating Budget
- Account for assessments and all other charges due the Owners.

- Maintain checking, savings and other banking accounts in the name of the Association including the collection of quarterly homeowner assessments and fees.
- Notify Owners of any delinquency and take reasonable action for the collection of the delinquent assessments as determined by the Association.
- Make all disbursements from assessments collected for normal recurring expenses as provided in the budget and as approved by the Association.
- Prepare monthly report of expenses, income, operating cash, cash reserves, accounts receivable and have ready for monthly finance committee meetings and monthly board meetings.
- Assist in the annual audit of the Association.
- Furnish monthly and year-end financial reports prepared on an accrual basis, which include all income and expenses and reflect the net cash position of the Association, Operating income/loss and Net operating income/loss.
- Prepare monthly delinquency report of outstanding assessments by homeowners with documentation of collection activity on each account in preparation for monthly finance committee meetings and monthly board meetings

II. Physical Property Services

- As directed by the Association, authorize and facilitate those activities which are necessary to maintain the property.
- Coordinate the activities of association employees or contracted services required for the operation and maintenance of the property.
- On behalf of the Association, develop specifications and bid proposals for legal services, insurance, landscaping, trash removal, trail and road repair, snow removal, recycling, townhome repairs, reclaimed water irrigation systems maintenance and other services as necessary and/or advisable.
- Maintain capacity within the Management Service to understand and describe the physical and contracting needs to meet Association needs.

III. Design Review Services

- Regularly inspect the property. Observe, record, monitor, and report deed restriction violations and contractor performance.
- Establish, coordinate and provide the administrative and secretarial functions of the Design Review Committee (DRC), including preparation, review and recommendation for approval/rejection of architectural applications, correspondence with owners requesting DRC compliance or completion of applications, and all necessary correspondence related to the DRC.

IV. Support Services

- Communicate with property Owners to understand their issues and find appropriate solutions.
- Issue work orders and monitor contractor performance to ensure that work has been completed in a timely manner and to the satisfaction of the HOA.
- Issue notices of violations of association rules and regulations.
- Administer the association's insurance portfolio, including the filing of claims.
- Help prepare, copy, print and mail association written communications and newsletter.
- Prepare and mail welcome information to new owners and plan, organize and present a quarterly orientation for new owners.
- Ensure all Association use and pay for remote storage lot spaces is coordinated with the North Association.
- Provide on-site manager and provide 24 hour per day, 7 day per week emergency on-call services –including weekends and holidays.
- Provide back up support for the on-site manager during vacations or absences for other reasons.
- Maintain confidentiality on contract negotiations, personnel issues, RFP proposals and details prior to selection.
- Confer with Association legal counsel when requested or as needed to conduct Association business.
- Record and prepare minutes of monthly board meetings and other committee meetings as needed.
- Attend various meetings after normal work hours associated with Association business, such as Design Review Committee meetings, Board of Director Meetings, Annual Meeting and other meetings effecting Association and community activities.

V. Property Manager

The Board of the Association understands that the responsibility for hiring the Property Manager lies with the Management Company. However, the Board will want the Management Company to provide a Property Manager that meets minimum qualification as listed below:

- Experience in property management for an association of the same or larger membership
- References from all previous engagements in property management
- Substantial experience in infrastructure evaluation and management
- Background and experience in budget management
- Demonstrated communications skills: written and verbal
- Conflict resolution experience preferred
- Resume of all work experience

Proponents may include all information on proposed property manager as part of their proposal

VI. Cost proposal

Each proposal shall include a proposed fee for the services desired by the Association. Such fee proposal shall include the cost of the property manager meeting the minimum requirements as listed in Section V. of this RFP. The proponent should detail their cost proposal as to describe all the significant cost items to add up to an annual cost for contract with your company. The proposed fee will be part of the evaluation criteria, but will not constitute all of the consideration in determining which company successfully meets the criteria as requested in this RFP