

June 2010

**Kings Creek Village Townhouse Association, Inc. (KCVTA)  
Management Contract Request for Proposals**

**The Client**

KCVTA is a homeowner's association for a community of 234 townhouses in the Dadeland area of Miami, in unincorporated Miami-Dade County, Fla. While it falls under the umbrella of the Kings Creek Village Association (KCVA) along with five other associations, KCVTA is an independent entity and is accordingly managed. HOA dues for the townhouse community are collected and managed by KCVTA. The annual budget for KCVTA including reserve income is \$449,280.00.

KCVTA is responsible for the maintenance and management of the townhouse community at Kings Creek, as well as several adjacent common area properties which are owned by the master association, KCVA. (See "Community Information" section below for more information.)

KCVTA is run by a nine-person elected volunteer Board of Directors. Directors serve one-year terms on a staggered basis, and may serve no more than three consecutive terms before cycling off the Board for a minimum of one year. The Board includes four officers: President, Vice-President, Secretary, and Treasurer.

**Bid Specifications**

General

KCVTA's managing agent will provide a part-time on site manager to be responsible for the maintenance and operation of the Association, including supervision of any Association employees.

Responsibilities

1. General administration of Association affairs in accordance with governing documents and Florida law.
  - a. Provide on site staff for a minimum of 20 hours per week to perform general office duties and insure phones and office are covered during business hours. Office staff should be proficient in Microsoft Word, Excel, Publisher, QuickBooks, and other electronic office programs and equipment as needed.
  - b. Provide on site maintenance personnel for a minimum of 24 hours per week (Mon-Thurs 10:00 a.m. to 3:00 p.m.; Friday 11:00 a.m. to 3:00 p.m.).
  - c. Supervise Association personnel. Make assignments, monitor hours, and other duties as assigned.
  - d. Keep a running list of all outstanding items to be addressed by management, Board or maintenance personnel. Ensure all items are completed as requested in a timely manner.
  - e. Arrange for manager or staff coverage when regular personnel are on vacation. Notify Board of personnel changes prior to their occurrence.
  - f. Maintain a 24-hour emergency call system as well as the ability to come to the property to handle emergency complaints and repairs within one hour of notification. Be on site for full property preparations in the event of tropical storms, hurricanes, or other emergency situations.
2. Community relations.
  - a. Handle all requests and correspondence with homeowners promptly and in a professional, courteous manner.

- b. Ensure every new resident, whether owner or renter, has received a copy of the By-Laws and Rules & Regulations of KCVTA and of KCVA as needed.
- c. Respond to all messages, correspondence, requests and submissions to confirm receipt of materials or requests.
- d. Assist homeowners as requested or needed in handling maintenance issues which concern multiple residents or the entire community, including but not limited to termite issues and utility repairs.

3. Manage Association finances.

- a. Establish an effective accounting system.
- b. Fulfill payroll in a timely fashion.
- c. Ensure all taxes, licensing fees and other charges are paid timely.
- d. Manage the collection of HOA dues, handle delinquent dues payment and late fee collections, and any other funds collections as needed.
- e. Disburse funds and payments after obtaining appropriate approvals and signatures.
- f. Provide monthly financial reports including cash flow, balance sheet, profit and loss statements, and reports on delinquent accounts.
- g. Manage Association accounts up to date. Transfer funds, monitor account activity and financial instruments, maintain signature cards, and other duties as needed.
- h. Monitor expenses against budget and keep Board informed.
- i. Prepare annual budget and annual statements.
- j. Assist contracted vendor with independent annual audit.

4. Risk and liability management.

- a. Maintain in good standing all insurance policies.
- b. Obtain competitive insurance coverage bids from best-rated companies.
- c. Keep Board informed of any risk issues.
- d. Refer all requests for proof of insurance to the agent's office.

5. Work with Board and committees.

- a. Assist with research and analysis.
- b. Prepare and distribute to the Board monthly reports regarding progress on projects, violations, repairs, operational issues, complaints and other issues as needed or indicated.
- c. Set up and attend meetings, and prepare documents and supplies for meetings.
- d. Record, prepare and distribute minutes of meetings.
- e. Prepare and mail all materials pertaining to annual elections.
- f. Proactively recommend action items for the Board or appropriate committees as needed.

6. Communications.

- a. Prepare and distribute all notices in accordance with Association's governing documents and Florida law.
- b. Prepare newsletter page inserts for master association's (KCVA's) monthly newsletter.
- c. Prepare and assist with distribution of materials including monthly newsletter pages, meeting minutes, and meeting agendas, to webmaster for posting on community website ([www.kcvamiami.com](http://www.kcvamiami.com)).
- d. Assist with preparation and mailing of newsletter or other correspondence as needed.
- e. Monitor and prepare written responses to regular or electronic mail correspondence as well as phone calls or messages.
- f. Fulfill requests for documents.

7. Maintain all official records, files, notebooks and electronic files up to date according to Florida law and Association policies. All such records remain the property of KCVTA.
8. Maintain property and equipment.
  - a. Conduct regular daytime property inspections at least once per month.
  - b. Conduct nighttime and weekend inspections at least once every two months.
  - c. Document rules or by-laws violations and units. Notify unit residents and owners as needed to remedy violations. Work to resolve violations and re-inspect for remedy as needed. Keep the Board informed of outstanding violations and progress toward resolution.
  - d. Document and arrange for repairs to/replacement of property/equipment as necessary. Seek Board approval as required.
  - e. Maintain supplies as needed for office, pet waste disposal stations, pool house bathrooms, and other items as needed.
9. Prepare requests for proposals (RFPs), bids and contracts. Solicit, analyze and compare competitive bids and quotes. Negotiate contracts as directed by the Board.
10. Supervise contractors to insure that services meet terms of contracts. Alert the Board regarding insufficient performance of contractors or regarding renewals of contracts in a timely manner.
11. Monitor and analyze security issues and report problems to security, law enforcement, and the Board as needed.
12. Complete rental screening procedures including appropriate criminal and credit background checks.
13. Handle Estoppel requests to include requirement of buyers' signature(s) acknowledging receipt of documents. Assist realtors and future unit owners or renters with questions. Complete PUD (Planned Urban Development) Letter requests for mortgage companies. Collect charges for each (\$50).
14. Prepare for and monitor KCVTA Annual Elections in accordance with Association by-laws and Florida law.
15. Maintain current CAM license.
16. Understand and be able to enforce all Association (Townhouse and Master) documents and rules.
17. Ensure all units carry current termite inspection warranties renewed annually.
18. Maintain flexibility and assume new assignments as needed.

### **Community Information**

KCVTA was incorporated as a non-profit entity in the State of Florida in 1979. The Association maintains several recreational areas that are in fact owned by the master association (KCVA). These areas include a swimming pool and small pool house, a playground, and tennis courts, located at the West end of the townhouse development, an area of greenery and walkways referred to as the "greenbelt," and the Snapper Creek Canal right-of-way and/or walkways to permit common access behind the townhouses which run along the canal. Excluding SW 83 Street, the streets in front of the

townhouses are private and are maintained by KCVTA. Light poles on the greenbelt are the responsibility of the master association, while the other structures including benches, garbage cans, and pet waste disposal stations, are the responsibility of KCVTA.

The Association maintains accounts with Community Association Banc (Tampa branch), Executive National Bank, Mutual of Omaha, and City National Bank. Monthly assessment fee coupon books are issued annually to each unit, and owners may mail payments directly to the bank or hand-deliver to the Townhouse office. Automatic electronic payments are offered based on the election to enroll by the unit owner individually.

The current management company uses the AVGAR management program as their accounting system. The Association's computer runs on the Microsoft Windows 2000 platform and utilizes the Microsoft Office suite of software among others. Office hours currently are 1:00 to 5:00 p.m., Monday through Friday, excluding holidays (New Year's Day, Memorial Day, July 4<sup>th</sup>, Labor Day, Thanksgiving Day, Christmas Day). Board meetings are held on the third Monday of each month at 7:30 p.m. unless the schedule conflicts with a major holiday, in which case the Board may elect to change the date. Meetings may also be scheduled as needed for urgent matters. Annual meetings are held on the evening of the second Wednesday in November each year. Committee meetings are held monthly or as needed.

Current vendor or supplier contracts include: KCVTA attorney; lawn service; pool service; tree trimming/removal projects; pest control and extermination; and management.

Current projects in progress or planning stages include: renovation of pool and deck area; repairs of greenbelt and fixtures and other areas as needed throughout the community; tree removals and replacements.

### **Bidding Schedule**

The current management contract expires 12/31/10 and KCVTA is requesting proposals from management companies interested in becoming our community manager. The initial contract term will be one year, from 1/1/11 to 12/31/11. The proposed timeline for the contract award process is:

Board approves and circulates this RFP	July 28, 2010
Proposals submitted no later than	September 10, 2010
Preferred company selected by	October 18, 2010
Contract signed no later than	November 15, 2010

Please submit your proposal to KCVTA by the September deadline. Send hard copies of proposals in a sealed packet (nine copies please) to Amy Leitman at 8135 SW 81<sup>st</sup> Place, Miami, Florida 33143. If submitting electronically, please send proposals to [KCVTASBoard@comcast.net](mailto:KCVTASBoard@comcast.net).

The following documents will be made available upon request to any party submitting a bid:

- a. KCVTA and KCVA Bylaws and Declarations
- b. KCVTA and KCVA Rules & Regulations
- c. KCVTA map depicting common areas
- d. KCVTA 2010 budget and year-to-date financial statements
- e. KCVTA policies and procedures
- f. Architectural Modification Request form and procedures
- g. Grounds Request form and procedures

Any costs associated with the proposal effort shall be borne solely by the bidding party. Under no circumstance will the KCVTA Board or any entity or person associated with the KCVTA Board be liable for any such costs.

The successful candidate will be selected by the KCVTA Board of Directors, at the Board's sole discretion, based on several criteria as outlined generally in this RFP. The decision of the Board shall be final, and no appeals shall be allowed. The KCVTA Board must interview the specific manager and staff that would be assigned to the community.

Any third-party contracts for any of the duties described herein must be disclosed in the bid submitted. In addition, the bid must include a representative list of communities managed by the bidding party, along with a name and telephone number as reference for each listed client community.

Proposals must describe in detail the services and facilities that the bidder will perform and furnish. Proposals must also provide detailed compensation schedules.

Proposals shall include a suggested form of contract agreement which shall be subject to negotiation by the parties. This agreement shall incorporate all applicable terms of the proposed agreement including but not limited to: compensation; insurance; indemnification of KCVTA, the KCVTA Board of Directors, and KCVTA members; statement of services to be provided; termination clauses; warranty of services; and other provisions typically included in agreements for the same or similar services.

If you have any questions or comments about this RFP please contact Amy Leitman, KCVTA President, at [KCVTABoard@comcast.net](mailto:KCVTABoard@comcast.net). Our responses to any questions of general interest may be shared with all bidders.

Thank you for your interest in Kings Creek Village Townhouse Association.