



## SOUTHERN VILLAGE HOMEOWNERS ASSOCIATION

### **REQUEST FOR PROPOSALS**

#### **HOA MANAGEMENT**

Issued 7/24/07

#### **The client**

SVHOA is the largest sub-association within Southern Village. Its 667 members include all 526 single-family homes in the neighborhood, plus 141 of the townhomes. Its 2007 budget is \$196,000.

#### **Legal structure**

Southern Village Master Association Inc (SVMA) is the umbrella organization that owns all Common Areas in the community. SVHOA is one of the 12 sub-associations that are members of SVMA (the other members being condominium, apartment or business associations). Due to its greater size, SVHOA accounts for more than 70% of SVMA votes.

By amendment dated 1/27/04 SVMA delegated to SVHOA responsibility for all Common Area maintenance, including assessment collection from the other sub-associations, and for architectural control of SVHOA member properties.

SVHOA is run by a five-person elected volunteer Board. Directors serve three-year terms on a staggered basis.

Southern Village is part of the Town of Chapel Hill. Accordingly, its streets and greenway path are owned, maintained and controlled by the town, as are the alleys behind

townhomes. However, the alleys behind SVHOA single-family member homes are private property maintained by SVHOA on behalf of those homes.

### **The manager we are looking for**

We would like to find a community manager who is "first." They are first to suggest budgets, they are first to suggest necessary repairs, they are first to manage projects, and they are first to resolve conflicts. A good manager should be in the community weekly, perhaps daily when large projects are going on. They should be doing the work and giving updates to the Board. The community manager should walk around Southern Village, not just drive. They should pick up trash on their walks. They should get to know the neighbors as they walk around. The vendors should call the manager first. The neighbors should call the manager first. The Board should provide strategy and high-level management. The manager should act in the best interests of the association and the neighborhood at all time. The manager should remember they are representing the Board in everything they do. They should have the highest standards for customer service. They should do everything possible to make our neighbors feel good about living in Southern Village. Of course the little things, like sending out bills and handling architectural review requests, should be handled flawlessly. Our ideal manager would be the first person we turn to as we strive make Southern Village the very best place to live and work.

### **Bidding Schedule**

Since its inception SVHOA has employed HRW as its community manager. The current management contract expires 12/31/07 and SVHOA is requesting proposals from management companies interested in becoming our community manager for a three-year term effective 1/1/08. The proposed timeline for the contract award process is:

Board approves and circulates this RFP	- July 24, 2007
Proposals submitted	- September 10
Preferred company selected	- September 28
Contract signed	- November 7

Please submit your proposal to SVHOA by the September deadline. Send any hardcopy information (five copies please) to Jeremy Purbrick at 205 Graylyn Drive, Chapel Hill 27516, and send electronic information to SVHOArfp@nc.rr.com.

### **Common Areas**

The Southern Village Common Area maintained by SVHOA includes:

- a) Approximately 70 acres of parkland along the creeks running through the neighborhood ("Prospect park")

- b) a soccer/baseball field and basketball court (“Central park”)
- c) 8 smaller parks and playgrounds dotted throughout the village
- d) four ponds
- e) 1,100+ street trees in the strip between the streets and sidewalks

### **Management Contract Scope of Work**

The attached spreadsheet lists the responsibilities SVHOA intends to delegate to its management company. Most of the services are designated mandatory (Status is “M” on the spreadsheet) and your bid must include these services to be considered. The remaining nine services are designated “Desirable” (Status is “D”). Including these services in your proposal is optional, but may make it more attractive.

### **Background Information**

The following background information will enable bidders to better understand SVHOA and its management needs. All of these documents are available at the association’s website <http://www.southernvillage.org>:

- a) SVMA and SVHOA Bylaws and Declarations as amended
- b) SVHOA mission statement
- c) Southern Village map showing Common Areas (Notes: (i) three of the 13 parks are Limited Common Areas not subject to this agreement – Barksdale, Merritt and the Green; (ii) the Racquet & Swim club is privately owned and maintained.)
- d) SVHOA 2007 Budget and year-to-date financial statements
- e) SVHOA Board policies, including Collections, Enforcement, and Townhome Exterior maintenance
- f) Architectural Review Process & Guidelines document
- g) Good Neighbor Guide

### **Questions?**

If you have and questions or comments on this RFP please contact Jeremy Purbrick at [SVHOArfp@nc.rr.com](mailto:SVHOArfp@nc.rr.com). Our responses to any questions of general interest will be shared with all bidders.

Thank you for your interest in Southern Village Homeowners Association.

## SCOPE OF WORK

Service	Status	Comments
<b>Accounting/Finance</b>		
1	Maintain member database	M Seven member categories (Single-family with/without alley, Courtyard homes, Townhomes I, Townhomes II, Highgrove and Westend townhomes) D Keep records of absentee owners and resident tenants M Allow members to make online payments D Give members online access to update their information
2	Bill and collect assessments:	M 526 single-family homes billed annually M 141 townhomes billed monthly M 11 sub-associations billed annually M Refer to Collections policy for details on handling delinquency
3	Maintain monthly accounts	M Includes seven separate Reserve accounts (General, Alleys, Courtyard homes and the townhome groups) M Produce monthly accounts in the agreed format by the 15th of each month D Allow SVHOA to select the bank of its choice
4	Approve and pay invoices	M Approximately 20 checks/month M Checks over \$500 need a second signature - Treasurer or President
5	Handle all finance/accounting correspondence	M
6	Prepare and file tax returns	M
7	Assist in preparation of annual budget	M
8	Reserve analysis	M
<b>Administrative</b>		
9	Plan, coordinate and attend AGMs	M One for SVMA and one for SVHOA M Prepare/distribute meeting notice and proxy form M Orient new board members
10	Plan and attend Board and Special meetings	M Six per year, lasting 3 hours each D SVMA - 3 per year at 1 hour
11	Prepare minutes	M
12	Resales	D Prepare/process transfer information (at the buyers expense?) M Maintain and distribute Welcome Packets (one for single-family homes, one for townhomes)

13	Newsletter	D	
14	Update the SVHOA website	M	
15	Special mailings/photocopying	M	
16	Negotiate contracts	M	Primary contracts: 10-15 Common Area maintenance vendors
		M	Project contracts: Approximately 10-15 per year.
17	Monthly manager's report	M	Note that your report will become public as part of Board minutes
18	Review standard operating procedures	D	Manager to point out where SVHOA policies, procedures or rules don't conform to industry best practices
19	Liaison with third parties	M	For example: Attorney, Town of Chapel Hill, SVMA, Racquet & Swim Club
20	After-hours answering/emergency assistance	D	
21	Rules enforcement	M	Covenants: See Enforcement policy, Declarations and Good Neighbor Guide.
22	Architectural Control	M	See Architectural Review Process & Guidelines document for manager's administrative duties. (Approximately 50 requests/year, plus up to 100 information-only reports.)
23	General correspondence	M	Respond to member questions, comments and complaints
		D	Provide information on laws and ordinances

**Building maintenance**

24	Townhomes	M	Administer HOA/Owner maintenance policy dated 8/1/07
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**Common Area Maintenance**

25	Supervise contractors	M	Confirm that services are performed as contracted
26	Periodic inspections	M	Biweekly inspections of grounds, park equipment, soccer field, basketball court, walkways and ponds
		M	Monthly inspections of Townhome and Courtyard home landscaping

**Other**

27	Manage facility rental contracts	M	Rainbow soccer, charity fundraisers etc.
28	Become the association's Registered Agent	M	