

# RFP for Stoneridge Park Property Management Services

Open Request for Proposal (RFP) for Homeowners Association Management Services\*

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## Introduction

Stoneridge Park HOA invites proposals from qualified Community Association Management companies to provide comprehensive management services for our community. We are committed to ensuring the highest level of service and operational excellence for our homeowners.

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## About Our Community

- Name of HOA: Stoneridge Park HOA
  - Location: Dennis Drive / Huff Drive, Pleasanton CA
  - Number of Units: 87
  - Amenities: Common Area Landscape, 2 mini parks managed by Association
  - Governing Documents: CC&R, By Laws, Rules & Regulations last written 1996, currently re-write is in progress (assistance expected)
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## Scope of Work

The selected management company will be responsible for, but not limited to, the following:

### 1. Financial Management

- Preparation and management of annual budgets
- Collection of assessments and delinquency management
- Monthly financial statements and reporting
- Reserve Fund Management
- Delinquent Acts : 1 ( In middle stage of collection)
- Online Portals :
  - Resident dashboard to pay dues online, read agendas, financial reports, notices, HOA announcements, update owner profile and information;
  - Board dashboard to view/review vendor quotes, vendors activities and schedule; invoice homeowners, financial management reports, legal documents, bank statements, vendor ledgers, pending and paid invoices, live bank balances.
  - Online approval of association checks, ACH for utilities, digital ACH or checks for vendors

### 2. Administrative Services

- Enforce HOA policies and rules
- Prepare and distribute board meeting agendas, minutes, and notices
- Digitally maintain association records (Owners, Tenants), escrow processing
- Assist with elections, Board Meetings & Annual meeting

### 3. Property Maintenance

- Vendor management and contract negotiation
- Regular property inspections
- Maintenance and repairs oversight
- Emergency response coordination

### 4. Homeowner Communication

- Serve as the primary point of contact for homeowners
- Manage a community website or portal
- Respond to homeowner inquiries and complaints

5. Homeowner data and information remains the exclusive property of the HOA. Any homeowner data stored on a service provider system, must be on demonstrably secure server and encrypted. Homeowner data cannot be sold, used, or stored on any other system with HOA Board approval in a General or Annual meeting. All data stored in a digital format should be returned and downloaded in a readable, digital format at the end of any contract. At least once per year a service provider should provide a digital copy of all HOA data in a readable, digital format. e.g. a password protected .zip file is acceptable.

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## Proposal Requirements

Interested companies must submit the following information:

### 1. Company Overview

- Legal name and contact information
- Years in business and areas served

### 2. Experience

- Relevant experience with similar HOAs
- Client references (minimum of 2)

### 3. Proposed Services

- Detailed description of services offered
- Proposed staffing and roles

### 4. Fee Structure

- Management fee
- Additional fees for specific services (if any)

### 5. Insurance and Bonding

- Proof of general liability and professional liability insurance
- Evidence of bonding capacity

### 6. Additional Information

- Any value-added services or technology platforms

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## Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Experience and qualifications
- Range and quality of services
- References and client feedback
- Cost competitiveness
- Value-added services

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## Submission Instructions

- Submission Deadline: Open
- Submission Method:
  - [president@stoneridgepark.org](mailto:president@stoneridgepark.org)
  - PO Box
- Questions and Clarifications: All questions must be submitted to [president@stoneridgepark.org](mailto:president@stoneridgepark.org)

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## Timeline

- RFP Release Date: 1/10/2025
- Deadline for Questions: Open
- Submission Deadline: Open
- Vendor Interviews: Not scheduled
- Contract Award Announcement: Open

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## Terms and Conditions

Stoneridge Park HOA reserves the right to reject any or all proposals, negotiate terms, and award the contract to the company that best meets the needs of our community. This RFP does not obligate the HOA to award a contract.

\* 'Open', as used in this RFP, means we are interested in considering a property manager proposals at anytime. Start date is negotiable.