

REQUEST FOR PROPOSALS (RFP) CHECKLIST

This Request for Proposals (RFP) checklist is designed to assist you in finding a management company that values the CMCA (Certified Manager of Community Associations) credential and the professionalism it represents. The checklist will guide you through the essential aspects to consider when evaluating proposals from management companies, including their expertise, experience, and dedication to ethical conduct. The following are items you should consider when reviewing bids from management companies:

- **Company background and experience:** Evaluate the management company's years of experience, size, and the types of communities they have managed.
- **CMCA-certified manager:** Confirm that the manager assigned to your community will be CMCA-certified and has the expertise to handle your community's unique needs. [Click here](#) to download interview questions.
- **Value of certification and professionalism:** Assess the management company's commitment to certification, professional development, and industry standards.
- **Communication and transparency:** Understand the company's approach to communication with the board, homeowners, and service providers, as well as their reporting procedures.
- **Financial management:** Evaluate their financial management processes, including budgeting, financial reporting, and collection policies.
- **Maintenance and property management:** Review their property maintenance, vendor management, and project supervision approach.
- **Technology and software:** Inquire about the company's use of technology and software solutions for community management tasks, such as accounting, work orders, and communication.
- **Pricing and contract terms:** Compare the management company's pricing structure, contract terms, and any additional fees to ensure it aligns with your community's budget and expectations.
- **Client references:** Request references from other communities the management company has worked with and follow up to get firsthand feedback on their performance.
- **Customization and flexibility:** Assess the management company's ability to adapt to your community's unique needs and provide customized solutions.

The CMCA is the only credential in community association management accredited under the National Commission for Certifying Agencies (NCCA) and the International Organization for Standardization's ISO 17024 standards. By prioritizing the CMCA credential, you ensure high knowledge, competence, and ethical conduct in community association management. We wish you the best in finding the perfect fit for your community association.