

REQUEST FOR PROPOSAL

Chantilly Highlands Homeowners Association

The Chantilly Highlands Homeowners Association (CHHA) is seeking proposals from qualified association management companies to perform the duties of staff executive and to serve as the Association's Headquarters Office.

Association Summary

- ☐ Chantilly Highlands is located in Oak Hill, VA. Our neighborhood has 909 homes built between 1980 and 1994.

Our streets are lined with sidewalks, and most sections have streetlights. A playground, two playhouses, picnic benches and two tennis courts are situated next to our community center, complete with pool, baby pool, and bath house. A paved bike path follows along a creek in Horsepen Run Stream Valley Park, connecting two sections of the neighborhood.

- ☐ We have an all-volunteer governing board consisting of nine homeowners including a President, Vice President, Treasurer and Secretary.
- ☐ We are actively seeking a management firm to perform the duties of chief staff executive and to serve as the Association's Headquarters Office. We would like to see a response to this request for a proposal submitted "menu" style where the existing Board would pick and choose which services we would implement.
- ☐ Attached are our current financial summary documents.

You can find our governing documents at: <http://chha.org/governingdocuments.htm>

Selection Process

- ☐ The Board will review and select up to three respondents to make a presentation to the Board at the January 20, 2011 Annual Meeting.
- ☐ Key dates
 - ☐ All proposals due: December 5, 2010
 - ☐ Review by Board: December 19, 2010
 - ☐ Notification of up to three finalists: December 20, 2010
 - ☐ Presentations at January 20, 2011 Annual Meeting;
 - ☐ Selection & notification of firm: January 27, 2011
 - ☐ Contract begins: February 1, 2011
- ☐ The contract will be for three years with an option to renew
- ☐ Any questions can be submitted in writing by email to: chhaboard@chha.org

Functions of the Chief Staff Executive//Headquarters Office

The functions expected to be performed by the individual or firm selected to manage the CHHA may include the following:

Membership Services

- ☐ Handle telephone requests and correspondence
- ☐ Assist in production of membership events
- ☐ Serve as the communications center for CHHA programs and business

- ☐ Attend and participate in CHHA monthly Board meetings

General Administration & Leadership Support

- ☐ Oversee the updating, maintenance, and production of business stationery, brochures, membership certificates, membership directory, and other materials as needed
- ☐ Maintain membership records and database, including the receipt and processing of membership applications and renewals
- ☐ Produce mailing labels for newsletters and other items as appropriate
- ☐ Assist Board with performance of its duties, including: preparation and distribution of meeting agendas, minutes, and financial reports; establishing and issuing reminders on action item lists; establishing a calendar of deadlines corresponding to Board meetings and bylaw
- ☐ Maintain CHHA records, including meeting minutes, financial reports, mailing lists, membership rosters, newsletter archives, and other membership services collateral material.
- ☐ Maintain and oversee the Architectural Control process including managing the database of approvals/denials.
- ☐ Provide handyman services for minor repairs of community property.
- ☐ Manage the rental and cleaning of the community center.
- ☐ Manage the maintenance of common grounds including mowing and snow plowing. (Your proposal does not include the cost of the mowing or plowing.)
- ☐ Provide an interface to the CHHA attorney, accountant, insurance agent and bookkeeper.

Financial Operations & Management

- ☐ Receive, deposit, disburse, and report on CHHA funds
- ☐ Prepare and update budget and financial reports for the organization, including detailed financial statements, records, tax accounting, and tax filings (Forms 990 and 990-T and others, as required, in conjunction with an accounting firm retained for this purpose)
- ☐ Prepare & produce general invoices
- ☐ Produce and distribute dues invoices
- ☐ Maintain records of accounts receivable
- ☐ Pursue receivable accounts
- ☐ Maintain general ledger of accounts
- ☐ Prepare checks for signature
- ☐ Reconcile bank statements
- ☐ Prepare and distribute monthly financial reports
- ☐ Prepare and assist in preparation of annual budgets
- ☐ Complete and file annual tax returns

General Management & Support

- ☐ Provide advice and counsel to Board of Directors
- ☐ Assist in establishing and quantifying organizational goals and objectives
- ☐ Assist in achieving organizational goals and objectives

Qualifications

Please answer the following questions so that we may have a better understanding of your capabilities and the likelihood that you can offer the breadth and scope of services we seek. Feel free to include supporting material.

General Background

Please provide answers to the following questions in your proposal.

- ☐ Are you familiar with the CHHA? If so, please explain.
- ☐ Please provide a list of current clients and a short description of the work you provide for them.
- ☐ Please list three client and/or professional references.

Administration

- ☐ What is the largest budget your company's staff has managed?
- ☐ What is the smallest budget your company's staff has managed?
- ☐ Have you had experience in working with an outside accounting firm? If so, please explain.
- ☐ Please detail your experience in database management.
- ☐ Please detail your experience in financial reporting.
- ☐ Please describe your experience/computer capabilities.
- ☐ What kind of computer hardware and software programs do you own and operate?

Association Management

- ☐ Briefly describe your professional background as it relates to duties outlined.
- ☐ Have you had experience managing an association the size of CHHA? If yes, please explain. If no, please detail how your qualifications match the outlined duties.
- ☐ If you were to accept this contract, what skills/tools would you need to acquire to meet the requirements outlined on the previous page?

Responses

To respond to this Request for Proposal, send an electronic copy of your proposal to:

Chantilly Highlands Board of Directors

chhaboard@chha.org

Attn: Bob Bevins, President

Proposals must be received by December 5, 2010 to be considered.

Any questions may be submitted to chhaboard@chha.org