



Request for Qualifications  
HOA/Property Management  
Services  
January 4, 2024

## **Who are we?**

We are one of the leading agencies for equitable and affordable housing development for the City of Concord and its residents. WeBuild Concord (WeBuild) was founded in 2019 under the original name, Concord Family Enrichment Association (CFEA). The purpose of CFEA was to serve as a nonprofit and enrichment arm for the City of Concord's housing division. The organization's mission expanded in 2021-2022 to provide opportunities through public and private partnerships for residents, including the building and developing of homes, a community land trust, and advocacy for equitable housing and community development. WeBuild is an inclusive and fluid model that responds to the specific needs of neighborhoods, economic and community development, and other intersectional factors that impact housing and talent development.

[www.webuildconcord.org](http://www.webuildconcord.org)

### **I. Overview & Purpose:**

WeBuild Concord is soliciting a qualified HOA management company to provide comprehensive asset management services for our residential, commercial, and mixed-use properties in Concord, NC. We are seeking a partner that can meet the unique needs of our properties, with a primary goal of enhancing value for homeowners, the city, and residents of Concord, NC. We are seeking a partner who can collaborate closely with us to create and execute an individualized strategy tailored to the specific needs of each property. Our desired outcome is increased efficiency and homeowner satisfaction, enhanced performance of all financial metrics, a proactive approach toward community engagement, and meticulous oversight of maintenance requirements.

### **II. Scope of Work:**

We anticipate engaging in a long-term partnership with a successful vendor that can meet or exceed our high standards in the following areas:

- I. Financial & Accounting Management – Preparing and filing all required paperwork, including tax returns, insurance renewals/tracking, maintenance fee collection & arrear tracking, and year-end closing process.
- II. Compliance – Knowledgeable interpretation, implementation, and adherence to applicable laws & regulations such as ADA/Fair Housing Act, coordinating tenant background checks, insurance policy management, and CC&R.
- III. Community Engagement – Foster effective relationships with homeowners/tenants through responsive customer service & resident programs/surveys; manage communication tools such as emails & website portals; hold regular board meetings; coordinate volunteers & event sponsorships; administer assessments.
- IV. Maintenance/Repair Services – Maintenance tracking/documentation; service request dispatching; capital projects scheduling; routine site visits; competitive bidding process coordination; negotiate contracts and oversee construction/repairs; source material supply.
- V. Property Operations & Reporting – Establish KPI reporting structure for occupancy rates, income forecasts, and budget variances; track leases status; lead forecasting initiatives (leasing activity) for existing assets in the portfolio; analyze past results vs. future projections on critical factors affecting occupancy and profitability

## **Reminder**

Firms should have no contact related to this project with the WeBuild Board of Directors or RFQ Review Panel members. Any such communication will subject the firm to **immediate disqualification** for consideration for this project. At the option of the RFQ Review Panel, interviews may or may not be held with three or more applicants if it is determined to enhance the selection process.

All other inquiries should be submitted to Jessie Sykes, Construction Coordinator, at [jsykes@webuildconcord.org](mailto:jsykes@webuildconcord.org).

### **III. Submittal Requirements**

The responding company must be well versed in modern HOA/property management best practices and be familiar with local laws related to residential, multi-family, and mixed-use housing, as well as any special zoning considerations about each asset class (commercial office buildings vs. apartments).

- I. Firm name and location of the office where work will be performed, including project manager and any known sub-consultants
- II. Specialized or appropriate expertise in affordable single and multi-family management
- III. Firm's existing management portfolio
- IV. The association managers, key personnel, and any known sub-consultants/vendors who will be involved in projects; their qualifications and experience related to the scope of work detailed above; and their anticipated assignments related to community management, including specific information on their experience with similar projects.
- V. Two to three client references for related work done in the past five years, including name, address, telephone number, and contact person most involved with the project
- VI. Historical data on HOA management over the past five years showing performance and client satisfaction, including but not limited to community engagement and preservation, incident management, CC&R enforcement, and fiscal management
- VII. Documentation of any history of litigation associated with project performance or professional liability, if applicable
- VIII. Documentation of the firm's financial standing and insurance coverage

### **IV. QUALIFICATION STATEMENT DEADLINE**

The statement of qualifications shall be limited to 15 pages, including the cover sheet. ONLY ELECTRONIC SUBMISSIONS WILL BE ACCEPTED. Submissions must be within the 15-page limitation to be considered. Submissions should be in .pdf format.

Electronic submission of the statement of qualifications is **due by 5:00 pm on February 2, 2024**, at the email address below. No statement of qualifications will be accepted after this time.

WeBuild Concord reserves the right to reject any statements of interest. A firm is anticipated to be selected and notified before the end of March 2024.

**The statement of qualifications should be sent to the following e-mail address as a .pdf file: [Info@webuildconcord.org](mailto:Info@webuildconcord.org). The subject line should contain the firm's name and "RFQ for HOA/Property Management."**

An electronic receipt will be sent when WEBUILD receives your submission. Paper copies will not be accepted.

## **V. SELECTION CRITERIA**

The considerations below will be utilized for the selection of the firm. After a thorough review, a neutral RFQ Review Panel will select the winning firm. Actual interviews may be conducted after a review of the responses by interested firms.

- I. The firm's recent experience, knowledge, and familiarity in the HOA/Property Management industry and the firm's demonstrated ability
- II. The experience of the staff to be assigned to perform the type of work required within the budget established per community
- III. Adequate staff or consultant team to demonstrate the capacity
- IV. Asset and/or property management and administration capabilities
- V. The firm's satisfactory performance on previous contracts, including a positive client relationship, commitment to the community, no significant legal or technical problems, and sufficient supervision for each community
- VI. Documentation of any history of litigation associated with project performance or professional liability, if applicable
- VII. Any other factors that may apply to HOA/Property Management

It is an absolute requirement of WeBuild that the project sites bearing our name and workforce be drug-free. WEBUILD will negotiate a contract with the top-rated firm following selection. If an agreement cannot be successfully negotiated with the top-rated firm, the panel will proceed to the second-rated firm. Firms that are not selected will be notified. If applicable under North Carolina state law, the proposing firm or subcontractors must be appropriately licensed to practice.

## **VI. CONTRACTING**

Any contract developed for this management agreement shall be construed and enforced according to the laws of the State of North Carolina. Any controversy or claim arising due to contracting shall be settled by an action initiated in the appropriate division of the General Court of Justice in Cabarrus County, North Carolina.

## **VII. EQUAL EMPLOYMENT OPPORTUNITY**

It is the policy of WeBuild to ensure equal employment opportunity without discrimination or harassment based on race, color, religion, sex, sexual orientation, gender identity or expression, age, disability, marital status, citizenship, national origin, genetic information, or any other characteristic protected by law. WeBuild prohibits any such discrimination or harassment.

**Please note the addendum for any contracts using American Rescue Plan Act funding.**