La Perla
PROPERTY MANAGEMENT

HOA MANAGEMENT PROPOSAL REQUEST FORM

Please complete the information below so we can prepare a proposal tailored to your community.

1. ASSOCIATION INFORMATION

Association / Community Name	
Property Address / Location	
City / State / ZIP	
Number of Units / Homes	
Year Built	
Association Website	

- ☐ Condominium
- ☐ Townhome
- ☐ Single-Family Homes
- ☐ Planned Development
- ☐ Mixed-Use
- ☐ Gated Community
- ☐ Other: _

2. PRIMARY CONTACT

Contact Name	
Board Position / Role	
Email	
Phone	

☐ Preferred Contact: Email ☐ Preferred Contact: Phone ☐ Preferred Contact: Text

3. CURRENT MANAGEMENT & TIMELINE

☐ Professional Management Company ☐ Self-Managed

☐ On-Site Manager ☐ Other: _____

Current Management Company	
Contract Expiration Date	
Desired Start Date	
Target Date for Proposal	
Target Date for Decision	

Reason for considering a management change:

4. SERVICES REQUESTED

☐ Full-Service HOA Management ☐ Financial Management / Accounting

☐ Board Meeting Management ☐ Homeowner Communication

☐ Vendor Management ☐ Maintenance Coordination

☐ Architectural Administration ☐ Rules & Compliance Administration

☐ Assessment Billing / Collections ☐ Annual Budget Preparation

☐ Reserve Study Coordination ☐ Insurance Coordination

☐ Election / Annual Meeting Support ☐ Community Website / Portal

☐ After-Hours / Emergency Support ☐ On-Site Management

☐ Project / Construction Management ☐ Other: _____

5. BOARD & MEETING INFORMATION

Number of Board Members	
Meeting Frequency	
Typical Meeting Length	
Annual Meeting Month	

Preferred Community Walk-Through / Property Inspection Frequency

☐ Monthly ☐ Twice Monthly ☐ Quarterly ☐ Other: _____

Requested frequency / notes: _____

☐ In Person ☐ Virtual ☐ Hybrid

Active committees, if any:

6. COMMUNITY AMENITIES & COMMON AREAS

☐ Pool / Spa ☐ Clubhouse

☐ Fitness Center ☐ Tennis / Pickleball

☐ Playground ☐ Parks / Greenbelts

☐ Private Streets ☐ Gates / Access Control

☐ Security / Patrol ☐ Elevators

☐ Parking Garage ☐ HOA-Maintained Roofs

☐ HOA-Maintained Exteriors ☐ Landscaping / Irrigation

☐ Lakes / Water Features ☐ Other: _____

Significant common-area facilities or maintenance responsibilities:

7. FINANCIAL INFORMATION

Current Monthly Assessment	
Annual Operating Budget	
Reserve Balance	
Delinquent Accounts	

- ☐ Current Special Assessment: Yes
- ☐ Current Special Assessment: No
- ☐ Future Special Assessment Considered: Yes
- ☐ Future Special Assessment Considered: No

If applicable, please describe any current or planned special assessment:

8. STAFFING, VENDORS & PROJECTS

- ☐ Association Employs Direct Staff
- ☐ On-Site Manager
- ☐ Landscaping
- ☐ Pool Service
- ☐ Janitorial
- ☐ Security / Patrol
- ☐ Gate / Access Control
- ☐ Maintenance / Handyman
- ☐ Pest Control
- ☐ Elevator
- ☐ Other Vendor: _____

Major vendor contracts La Perla would administer upon transition:

Major projects anticipated or underway in the next 12–24 months:

Significant deferred maintenance or operational concerns:

9. BOARD PRIORITIES

Please select up to five priorities:

- ☐ Responsive Communication
- ☐ Improved Homeowner Service
- ☐ Better Financial Reporting
- ☐ Budget / Expense Control
- ☐ Vendor Oversight
- ☐ Proactive Property Inspections
- ☐ Maintenance Follow-Through
- ☐ Board Guidance & Support
- ☐ Rules / Compliance Administration
- ☐ Collections Management
- ☐ Major Project Oversight
- ☐ Technology / Homeowner Portal
- ☐ Meeting Preparation & Follow-Up
- ☐ Smooth Management Transition
- ☐ Long-Term Planning
- ☐ Other: _____

What would a successful management relationship look like to your Board?

10. SUPPORTING DOCUMENTS

If readily available, please include the following. These are helpful but not required to begin the proposal process.

- ☐ Current Annual Budget
- ☐ Most Recent Financial Statements
- ☐ Current Management Agreement
- ☐ Reserve Study
- ☐ CC&Rs
- ☐ Bylaws
- ☐ Rules & Regulations
- ☐ Current Vendor List
- ☐ Insurance Summary
- ☐ Recent Board Meeting Minutes
- ☐ Community Site Map
- ☐ Other: _____

11. ADDITIONAL INFORMATION

Anything else that would help us understand your community or the Board's expectations:

Submitted By	
Title / Board Position	
Date	

SUBMIT COMPLETED FORM TO:

Yamy@laperlapm.org

Thank you for considering La Perla Property Management.