

## PROPERTY MANAGEMENT SERVICES

### CAPACITY EVALUATION

You will need to study the proposals that come in and choose the firm that best meets your needs. Follow the three-step process below.

#### Step 1

Review each proposal to make sure it meets the mandatory requirements listed in the *RFP Instructions* and shown below. Disqualify any proposals that do not meet the first six and, if applicable, the seventh.

Mandatory Requirements		
Firm Name:		Y/N
1.	Proposal came in by the submission deadline.	
2.	Proposal Form in RFP was used; all information was included; all questions have been answered; proposal is signed by the firm's authorized representative; proposal complies with all RFP instructions.	
3.	Firm is incorporated.	
4.	Firm is carrying or has said that it will get the minimum required insurance.	
5.	Firm currently manages properties numbering at least 200 residential units altogether for at least four different third-party clients. —OR— Firm currently manages properties numbering at least 100 residential units altogether for at least two different non-profit housing co-operatives and firm's principals between them have managed properties numbering at least 200 residential units altogether for at least four different third-party clients.	
6.	Firm has a strong back-office capacity and the ability to integrate the co-operative into its larger management systems.	
7.	Firm can provide service in French (answer NA if not applicable)	

#### Step 2

Look at the capacity of each firm kept through Step 1. You can use the form below to do this. You will need to decide on a minimum acceptable total score. Check the firms' references before scoring the proposals.

Capacity		
Firm:		
Factor	Max Score	Firm Score
<b>Clarity of response:</b> the clarity of the response and understanding shown of the co-op's needs	10	
<b>Staff resources:</b> the experience, qualifications and general suitability of the firm's key personnel (senior managers, property-management staff and accounting staff)	20	
<b>Property management approach:</b> the firm's property-management systems and approach; its process for taking on new clients; its capacity to select, train, direct and evaluate staff, including any maintenance or caretaking staff; how it handles emergencies during and after business hours; its ability to provide substitute staff during illnesses, vacations and other absences	25	
<b>Quality control:</b> how the firm ensures the quality of its services and those of tradespeople; how the firm deals with errors, omissions, delays and tenant or member enquiries, concerns and complaints	15	
<b>Experience and past performance:</b> the firm's experience and track record in managing rental residential properties; if relevant, the firm's experience in managing financial workouts	20	
<b>Knowledge of co-operative housing:</b> how well the firm knows co-operative housing; its ability to support the co-op's good governance	10	
<b>Maximum Score</b>	<b>100</b>	

### Step 3

Rank the firms by capacity score, from highest to lowest. Look at the pricing of the top three firms.

Conduct any planned interviews. Then choose a firm from among the three top-ranked firms.