

**“Transition Phase Cost Proposal” for the City of Palm Desert RFP 2024-RFP-142  
Affordable Housing Compliance and Property Management Services**

**Transition Phase Cost Proposal**

National Community Renaissance (National CORE) is pleased to submit the enclosed Transition Phase Cost Proposal for the City of Palm Desert. As an experienced organization with a proven track record in property management and development, we are confident in our ability to execute a seamless transition, ensuring continuity of services, minimal disruption, and enhanced operational efficiencies.

Our proposal outlines a comprehensive transition plan that includes detailed strategies, activities, timelines, and resource allocations to address the unique requirements of your project. Highlights of our approach include:

- **Seamless Handover:** A phased handover strategy to ensure no gaps in services during the transition period.
- **Asset Management:** A robust inventory and transfer plan for physical and digital assets to safeguard operational integrity.
- **Compliance and Quality Assurance:** Rigorous compliance reviews and quality checks to maintain regulatory standards and optimize performance.
- **Expert Team:** A dedicated transition team comprising experienced professionals to lead each aspect of the process.

**National CORE would NOT charge for the transitional phase, as this is considered part of our due diligence to ensure a smooth start to the project. The only costs associated would be for connection costs, Yardi setup, and necessary equipment. This approach reflects our commitment to providing exceptional value while ensuring operational readiness from day one.**

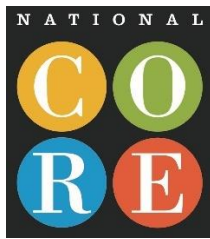
We appreciate the opportunity to partner with you on this endeavor and look forward to further discussing how our tailored approach aligns with the objectives outlined in your Request for Proposal. Please feel free to contact me directly at (909) 215-5322 or [crichard@nationalcore.org](mailto:crichard@nationalcore.org) if you have any questions or require additional information.

Thank you for considering National CORE as your trusted partner for this project.

Sincerely,

A handwritten signature in cursive script that reads "Courtney Richard".

Courtney Richard  
National CORE  
Senior Vice President of Property Management



**“Transition Plan” for the City of Palm Desert RFP 2024-RFP-142  
Affordable Housing Compliance and Property Management Services**

**Transition Plan**

**Strategies and Objectives**

The primary goal of the transition plan is to ensure seamless continuity of services with minimal disruption for stakeholders, tenants, and staff. This involves strategic planning, efficient communication, and careful execution.

**Detailed Transition Activities and Timeline**

Phase	Activities	Timeline
<b>Pre-Transition</b>		
- Review existing contracts and scope of services.	Week 1	Legal and compliance team.
- Conduct kickoff meeting with stakeholders and outgoing management firm.	Week 1	Key personnel, agenda, and documentation.
- Develop a comprehensive transition checklist, including asset transfer and systems migration.	Week 1-2	Transition planning team.
- Identify and onboard transition team members.	Week 1-2	HR and recruitment support.
<b>Transition Implementation</b>		
- Inventory and assess physical and digital assets.	Week 2-3	IT specialists, property managers.
- Begin phased handover of operational responsibilities (e.g., work orders, maintenance logs).	Week 3-4	Current and new management team coordination.
- Deploy and integrate property management software.	Week 3-5	IT and training team.
- Train new staff on systems, processes, and tenant relations.	Week 4-5	Trainers, property managers, staff schedules.

<b>Handover and Stabilization</b>		
- Conduct property walkthroughs with outgoing firm to validate the asset condition report.	Week 6	Management team, property staff.
- Finalize compliance and file audits; address discrepancies.	Week 6	Compliance team.
- Test continuity systems for maintenance requests, tenant communications, and reporting.	Week 6	IT support, tenant communication team.
- Official handover meeting with stakeholders to validate service continuity and acceptance criteria.	Week 7	Key personnel, detailed reports, legal review.

## **Asset Inventory and Transfer Plan**

### **Physical Assets**

#### **1. Equipment:**

- Conduct inventory of tools, machinery, and office equipment on-site.
- Transfer ownership or leases to new management.
- Assign maintenance responsibilities to the incoming team.

#### **2. Facilities:**

- Evaluate condition reports for buildings and shared spaces.
- Address any pending repairs or unresolved maintenance issues.

### **Digital Assets**

#### **1. Software:**

- Migrate all data (tenant files, lease agreements, financial records) from outgoing firm's property management software.
- Implement new software systems if necessary, ensuring overlap during migration.

#### **2. Documentation:**

- Transfer all operational manuals, compliance records, vendor contracts, and historical files.
- Securely store digital copies on cloud platforms with restricted access.

## **Formal Handover Plan**

### **1. Clear Acceptance Criteria:**

- Ensure all tenant files are complete and up-to-date.
- Verify full migration of software systems and operational data.
- Conduct a final inspection of all units and common areas.
- Validate vendor and contractor agreements have been transferred or renegotiated.

### **2. Handover Protocol:**

- Outgoing management provides a comprehensive briefing on unresolved issues, including open maintenance requests and compliance concerns.
- Final acceptance sign-off by both parties and stakeholders.