



**Current Vendor Checklist**  
**(for all clients of Berkeley Property Management, LLC)**  
**Originally Effective: January 1, 2009**

**Reconfirmed, Edited & Officially Published: November 12, 2017**

Annual Check: either Tony Smith (Owner of Berkeley) or Patsy Smith (Berkeley President) to discuss with vendor senior management (or, ownership) how the past year has gone; conversation will be on the phone or face-to-face; focus will be on the strategy to make sure we all are on the same page about (1) what worked, (2) what did not & (3) how to improve services for the year ahead

Semi-Annual Check: Patsy Smith or Peggy Akers (Berkeley Director of Operations) to discuss with vendor managers how the past six months have gone; specific topics will include, (1) direct feedback from HOA members, (2) feedback from HOA Boards, (3) observations from key Berkeley staff (ex, Field Manager for on-site visits or Finance Manager for billing process); also, proof of insurance will be re-checked to make sure everything is in order, including expiration of all insurance policies; finally, discussions will focus on key suggestions the vendor would like to make beyond the day-to-day serving of HOA accounts, focus will be on longer term improvements, including key decisions on deferred and/or long term HOA maintenance

Quarterly Check: Michelle Johnson (Office Manager) to discuss with vendor managers core details such as (1) service level agreements, ensuring they tie to the contract between the vendor and the appropriate HOA, (2) timeliness of invoices and billing accuracy of those same invoices (3) status of any special projects (ex, fall pruning, etc.) which are part of the master service agreement but are not done on a weekly and/or monthly basis, (4) feedback from Berkeley office regarding comments, positive or negative, about any vendors services

Monthly or Weekly (depends on service/time of year): all members of Berkeley that are walking the property (as a reminder, someone at Berkeley walks all properties at least once per week in the spring, summer & fall months to check on the overall status (look and feel) of the HOA property; during these site inspections, direct interaction happens between Berkeley and the vendor's field (on-site) staff; constant feedback is provide to ensure continuous improvement; as a special note, if after three separate discussions, improvements are not made to the vendors services, then Berkeley management will become involved and if necessary involve higher up management at that particular vendor

Some examples of what Berkeley is looking for (on weekly visits):

- Did the vendor perform on-site service (if no, was weather the reason?)
- Assuming yes, was the work in line with the existing contract
- Did any area or areas get missed for any reason
- How does the overall area look, is the vendor looking at the bigger picture (example, are they only doing the work or are they making sure all areas look good, including things that might not be directly in their control)
- If Berkeley can see the vendor working, does the vendor staff look professional (example, do they have on a company uniform, etc.); also, if the vendor management is on-site, do they recognize Berkeley staff and attempt to engage in a conversation on-site (if appropriate)
- Did the vendor leave the area they worked in as well or better than they found it (example, did they pick up trash, even though they did not generate it)
- If Berkeley needs to call or text the vendor, did they (vendor) respond quickly (within that same day) and did they correct this issue in a timely manner (within that same week)
- If Berkeley had to send an e-mail to the vendor, did they respond within 2 business days with appropriate follow up? Did the issue in question get fixed (within that same week)
- Other, as deemed necessary by Berkeley staff