



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

**Reconfirmed, Edited & Officially Published: November 13, 2017**

Whenever Berkeley is going to use a new vendor (note, new vendor is someone that Berkeley has not used for HOA work in the last 12 months), the following steps must be followed by Berkeley's Officer Manager (Michelle Johnson).

1. Contact the new vendor to request billing information, including address, contact information, etc.
2. Also, new vendor must provide proof of insurance, specifically a certificate of insurance with an expiration date in the future; soft or hard copies will be accepted
3. Also, new vendor must provide three business references of clients they have done work for in the last 12 months; Berkeley will contact all three references to confirm excellent reviews are given; if for any reason the references cannot be checked out, then the vendor will have to provide additional name(s)
4. Finally, Berkeley will check for relevant publicly available information on the vendor; which may include (but is not limited to) online reviews, online ratings, Better Business Bureau Reports, D&B and/or other credit reports and/or any publicly available information on the vendor financials (note, if the vendor is privately held this will be very limited)
5. Once the new vendor passes all the above steps, they will be added to the new vendor list and used sparingly for the first 90 days, just so that all parties can get a comfort for working with one another; after which the vendor will move to activities covered by the current vendor checklist