



## **General Responsibilities of Berkeley Property Management Staff**

### **Office Manager (Michelle Johnson)**

1. Handles work orders and assignments to vendors
2. Sets up on-site inspections
3. Returns and answers phone calls during office hours (M-F from 10-2)
4. Sends out any written correspondence
5. Collects mail and disseminates it to staff members
6. Manages the files and association records
7. Compiles information for Manager's Report(s) and Board Meeting Agenda(s)

### **President & Field Manager (Patsy Smith)**

1. Manages all aspects of landscaping: requests, bidding, installation of plants, budget
2. Visits the community to inspect grounds weekly during growing period; monthly in winter
3. Works closely with Board member in charge of landscaping and provides updates concerning the budget and expenses; aids in preparation of the budget
4. Handles all communications with landscape vendors (Ruppert Landscape, Pyramid Landscape, Bartlett Tree, etc.) and approves their invoices
5. When needed, inspects various (usually larger) repairs to townhouses or HOA property

### **Finance Manager (Tara Furze)**

1. Works closely with the treasurer to make sure financial obligations are met
2. Pays community bills
3. Collects dues
4. Sends out delinquent notices
5. Prepares monthly financial reports
6. Prepares year-end financial reports and share with tax preparer

### **Director of Operations (Peggy Akers)**

1. Works closely with Board President(s)
2. Is the primary link between the Board President and the staff of Berkeley
3. Attends Board meetings and facilitates any action items with other staff members
4. Manages large projects from bidding to completion
5. Helps staff in emergency situations
6. Oversees the Manager's Reports, Agendas, and other requested items



## Founder (Tony Smith)

1. Consulates for Berkeley on an “as needed” basis

The list above may be incomplete as situations occur weekly that could fall to anyone on the staff. We operate as a team which really enhances our ability to meet expectations. For example, Michelle should be called with work order requests. Sometimes Patsy or Peggy may be on site and given a request for a repair to one of the units. We will take the request back to Michelle.

## Vendors

We want to clarify the way vendors are chosen. We have several trusted vendors whom we have used for many years. All have liability insurance. We welcome members suggesting good vendors, but a certain procedure needs to be followed. First, you need to discuss the situation and the vendor with Berkeley staff. We can then contact this vendor to determine if he has liability insurance. If sample work is available, we can look at it or get references. Once we have the COI, the committee wanting the work can discuss exactly what is involved and bring the recommendations to the board. We then execute the approved plans. We may need to get other bids for large projects. It is very important for the Board and for Berkeley that all vendors are covered sufficiently.

## Committees

We recommend that the Board really work on using committees to make the organization run more effectively. The committees can investigate ideas that the Board wants to pursue. **One important point is that all work that committees recommend has to have the approval of the President and/or the full Board before Berkeley can proceed with the project.**

## Other Board Members

The Director of Operations or the Berkeley President will be the primary contact for the President of each HOA. Other board members are encouraged to go through the HOA President directly rather than contacting the Berkeley. The President and the Director of Operations or the Berkeley President will be in close contact when the need arises. An important part of an effective organization is that the President be entrusted to make those day-to-day decisions without having full Board approval. Any large expenditures should be discussed by Board members and voted on at a meeting or if it cannot wait for an e-mail vote.