



BAYSIDE MANAGEMENT VENDOR GUIDE

PROTOCOL FOR NEW & EXISTING VENDORS

Welcome to Bayside Management. This document provides detailed information for our new and existing vendors regarding maintenance of the properties managed by Bayside Management. It is our expectation that vendors will follow the guidelines outlined in this pamphlet.

TABLE OF CONTENTS

INTRODUCTION

ACCESS

KEYS

CONTRACTORS

UNLICENSED WORKERS

BILLING

ADVANCE /PROGRESS PAYMENTS

WARRANTIES/RECEIPTS

APPLIANCES

TENANT MAINTENANCE

GENERAL GUIDELINES

*Respect/Communication

*Cost & Material Considerations

*Timeliness

*Tenant Grievance

*Vendor Grievance

*Managing Agent Grievance

*Tenant Bill Backs

VENDOR GUIDELINES

Protocol for new & existing vendors

INTRODUCTION

First, we would like to thank you for beginning or continuing as a vendor with Bayside Management. While we recognize that our vendors are independent contractors they are also an extension of Bayside Management and as such should demonstrate the utmost attention to customer service and professionalism when representing us in the field.

ACCESS

In accordance with our leasing documents and California real estate guidelines, we are required to give 24 hours' notice to enter a residency. Please be sure to contact the tenant in accordance with these guidelines. Contact information can be obtained from the front desk Office Manager. It is generally preferable to have the tenant's permission for resident access in accordance with the tenant's needs. If you are having difficulty gaining access, defined as two to three unsuccessful attempts to schedule, please alert the Managing Agent immediately and they will provide assistance.

Please note that these guidelines do not apply to **emergencies** such as fire and flood where the preservation of the property is paramount.

KEYS

Check with the Managing Agent as to whether there is a lock box in place at the property and how to access the lock box. If no lock box is in place a key may be checked out. The Managing Agent is responsible for logging the key out via the key log book located at the front desk; these keys will be placed in will call or delivered directly to the vendor from the Managing Agent. Keys must be returned promptly (next day) after job completion. When you return the key, it is your responsibility to be sure that the key is logged back in to the key log book; otherwise we may charge you for the unreturned key set or a lock change. If you are taking the last key set, please alert the front desk staff or Managing Agent.

CONTRACTORS

All contractors must provide us with a current copy of their contractor's license and proof of insurance. We may also ask for references and check the status of your licensing with the State Contractors Licensing Agency. We expect that our licensed contractors are familiar with local jurisdiction requirements for permits and will file such permits when necessary. We also expect our licensed professionals to provide rigorous job oversight if they are not completing the work themselves. Please be aware that Managing Agents will inspect work completed before issuing final payment. If there are any defects in workmanship we expect these deficiencies to be remedied promptly.

NON-LICENSED CONTRACTORS

These professionals should also provide proof of liability insurance. Furthermore they must adhere to the California State Guidelines on non-licensed professionals work related restrictions; specifically work cannot exceed \$500.00 including labor and materials in accordance with California Business and Professions Code BPC Section 7048. We may also ask for references before you begin working with us. Please remember we are hiring you to represent us. We do not allow our non-licensed professionals to sub-contract work to other parties. Also be advised that Managing Agents reserve the right to inspect for defects in workmanship, prior to issuing final payment, on any job dispatched and we expect prompt remediation if any defects are found.

BILLING

Invoices may be hand delivered to the Managing Agent who assigned the work, mailed to *180 Harbor Drive, Suite 100, Sausalito, CA 94965*, faxed to *(415) 331-3727* or e-mailed to the Managing Agent using first initial and last name plus baysidemgmt.com (*i.e. msmith@baysidemgmt.com*). All invoices **MUST** include the address of service and the name of the Managing Agent. Failure to include this information may result in a delay of payment. New vendors must provide us with a Tax Identification Number before we will issue any payments. Invoices received and adhering to these guidelines will be processed within three to ten business days.

ADVANCE PAYMENTS/PROGRESS PAYMENTS

As an independent contractor, we expect our vendors to be adequately capitalized and therefore we strongly discourage advance payments. Advances are granted ONLY on large projects and limited to 10-20% of the project cost. A formal estimate or construction contract must be submitted in advance to obtain these payments. Exceptions can be granted only by the Broker and only for a demonstrated need. Detailed Progress Payments on large scale projects must be outlined in the construction contract and will be strictly followed. The Managing Agent will inspect to insure that all work is done in accordance with the construction contract before releasing any additional progress payments and will also obtain any necessary lien releases.

WARRANTIES AND RECEIPTS

At the completion of any job, all workmanship warranty, component warranty information and supporting receipts must be given to the Managing Agent. Non-licensed contractors must provide all material receipts with their invoices and detail this information in the breakdown of costs on their billing in order to receive reimbursement. If a vendor needs a billing template, we can provide one for you.

APPLIANCES/FLOORING

Generally we order all appliances and flooring through our office in order to obtain quantity discounts and maintain warranty information. If there is a need for an appliance, please contact the Managing Agent in charge of the property so that they can arrange the purchase and delivery.

TENANT MAINTENANCE RESPONSIBILITY

Please note that certain items are considered part of the routine maintenance of the residency and are the responsibility of the tenant, not the landlord to maintain/replace. Examples of common items tenants are responsible for are:

BATTERIES

LIGHT BULBS

FURNACE FILTERS

CLEANING SURFACE MILDEW IN BATHROOMS AND UNVENTILATED AREAS

If you are finding these items in need, please alert the Managing Agent so that a reminder notice or phone call to the Bayside Management tenant can be delivered.

Furthermore, if you determine that maintenance item(s) being addressed by you are the result of tenant negligence or abuse, please alert the Managing Agent and follow the procedures outlined in "Tenant Bill Backs" at the end of this document. Observations of excessive wear and tear should also be reported to the Managing Agent.

GENERAL GUIDELINES

Respect and Communication

First and foremost remember that we have placed our **trust** in you to enter into someone else's home; please be mindful of that trust. Be respectful of tenants and their property. Make sure that you arrive when scheduled and clean up adequately after you have completed your job. Do not engage tenants in conversation beyond the repairs at hand and keep that limited, direct and brief. Remember too, when you are at the property and notice an item that needs attention unrelated to the job you were assigned to, please alert the Managing Agent to that need. Also, if you hear complaints or other issues from the tenant, let the Managing Agent know so that we can work to address them.

Please also take a moment and communicate with your Managing Agent how you like to receive work order communications i.e. e-mail, text, phone (cell or office), fax or written. Once you establish a communication style we will work to connect with you in that way.

Cost and Material Considerations

Please consolidate work order trips to minimize the expense to the homeowner/landlord. Be cost conscious when shopping for materials. Remember that we have a pretty good idea what repairs should cost and will hold our vendors to those standards. Please do not use shower valves or other plumbing fixtures that do not have readily available replacement parts. Do not install fixtures, screens and blinds of known inferior quality.

Timeliness

We all understand that it is sometimes difficult to manage multiple priorities. If you are having difficulty managing the workload we have assigned to you, please let us know. Our expectation is that you will make initial contact to our tenants **the day you receive the work order or within 24 hours of receiving the work order**. Our tenants deserve a timely response to their maintenance issues; if you cannot address them promptly, please let us know. We would rather you tell us the truth rather than what you think we want to hear.

Tenant Grievance

While most tenants are agreeable, if you run into an issue with a tenant, please let the Managing Agent know right away, do not delay. We are better equipped to handle issues if we have advance information and time to digest the grievance. Many thanks for your cooperation.

Vendor Grievance

The reciprocal is also true, if you have an issue with a tenant, another Bayside Management vendor or an owner/landlord, please let us know immediately so we can work to promptly resolve it. If you are having difficulty reaching a tenant to perform dispatched work; please let the Managing Agent know within 24 hours so that we can work to resolve the issue.

Managing Agent Grievance

If you are having some difficulty with a Managing Agent please let them know. We rely on our vendor relationships and if they are not operating properly we want to work diligently to resolve them. You are a valued member of our team

Tenant Bill Backs

Occasionally our vendors will need to provide us with invoice detail that will be charged back to the tenant. We ask that our vendors track these expenses and invoice them *separately* so that we can provide this information in a clear and concise form to our tenants. Do not combine bill back work with other work performed on one invoice.

AGENT AND VENDOR RESPONSIBILITIES IN A NUTSHELL

Agent Responsibilities

Bayside Agents need to contact you by phone, text, or e-mail, whichever you prefer, and provide you with the following:

- Address of tenant
- Name of tenant
- Phone number of tenant
- Special instructions, if any (i.e. pets, etc.)
- Information on access to the property (put key to the property for pick-up in the office, if necessary)
- Inspection of work, if required
- Follow-up with vendor
- Make sure vendor gets paid in a timely fashion

Vendor Responsibilities

Because you interface with the tenant, you are an extension of Bayside Management and represent us, as well as your company. Providing excellent service and exhibiting professional demeanor is very important to us. Besides providing us with a signed W-9, and other legal information, we expect you to:

- Contact the tenant within twenty four hours after the Managing Agent gives you a work order, and give the tenant a time and date of when you will arrive to do the repair
- Arrive **promptly** on the day scheduled (if running late because of unexpected reasons, please contact the tenant and tell them you are running behind)
- Get key from our office if the tenant is not going to be home but gives you permission to enter their unit. Agent should have placed key in “Will Call” for you to pick up.
- Contact the tenant and set a new date and time AND also contact the Managing Agent if you have an emergency elsewhere and cannot get to our tenant on time
- Refrain from talking to tenant other than “chit-chat”
- Tell the Managing Agent as soon as possible, if the tenant gives you problems
- Discuss with Managing Agent if you would like them to change the way he/she is dealing with you
- Tell Management Agent if you suspect the maintenance issue you are repairing is a result of tenant negligence or abuse
- Return key to office receptionist within 24 hours or drop it off in the black lockbox outside the office as you come in the driveway
- Submit invoice that includes the address where work was done and the Managing Agent’s name to our office as soon as possible (if we receive invoice after the 23rd of each month, it will be held for payment until the next month, so the bookkeepers can prepare monthly statements for owners)
- **Let Agent know when work has been completed by either email, phone call or text**

*On behalf of Bayside Management,
we thank you for your continued partnership.*

**BAYSIDE MANAGEMENT PHONE
EXTENSIONS
415-383-8400
FAX: 415-331-3727**

Leasing Agents/Property Managers

Joanelle Russell	x 0517
Dylan Motchar	x 0518
Peter Boda	x 0513
Maria Villegas-Hoppe	x 0534
Mary Wiegmann	x 0514
Judy Udstad	x 0512
Samantha Skinner	(cell: 707-331-0033)

HOA Managers

Mary Wiegmann	x 0514
Maria Villegas-Hoppe	x 0534
Joanelle Russell	x 0517

Office Manager

Barbara Boyd	x 0510
--------------	--------

Broker/Owner

Jeff Hacker	x 0511
-------------	--------