

CONNECTED MANAGEMENT

Project Estimates



BOARD MEMBER INSTRUCTIONS

Condo Management – V091422

PROJECT QUOTES/ESTIMATES

If your Board requires estimates to be obtained from one or more vendors for a repair or maintenance project, we need specific information and guidance in order to properly coordinate the engagement. Your Board will specify the number of estimates needed and the vendor(s) that should be contacted.

For projects of this type, there is a fee associated with coordinating the effort and obtaining of each estimate. A fee does not apply for all types of estimates. (Your management contract may include a specific number of quotes, per year, that are provided for no additional fee. Reference your management agreement for further details.)

Key notes about project estimates:

- The Board may define the number of estimates to be obtained
- The Board may define the vendor(s) that are included in the estimate process. If the Board does not have a specific vendor that it would like used, a “Connected Known” company will be used.
- There is a fee associated with each estimate requested. (Your management contract may include a specific number of quotes, per year, that are provided for no additional fee. Reference your management agreement for further details.)
- An online form must be completed to provide us with the exact information that is required in order to obtain an appropriate estimate and coordinate the effort.
- The average turnaround time to obtain a professional estimate from a vendor is a minimum of two weeks. If multiple vendors are involved (multiple quotes) this timeline will be extended. Please set Board expectations accordingly.
- Fees do **not** apply for obtaining quotes for the following needs:
 - Seasonal lawn care
 - Seasonal snow removal
- Fees also do **not** apply for coordinating and dispatching vendors to perform repair work. If an estimate or quote is not required, no fee applies. This would typically include all emergency repairs and after-hours needs.
- Boards may elect to obtain estimates from companies directly to avoid a fee. We have a useful list of vendors available here:

<https://www.connectedmanagement.com/documents/VendorList.pdf>

The remainder of this document provides specific details about many of the points listed above. If you are ready to submit your request for an estimate to be obtained, you can complete the *Quote Request Form* by clicking the link below or typing the address into any web browser: <http://quotes.connectedmanagement.com>

NO-CHARGE ESTIMATES

Many of the estimates required to support the Association are obtained with no associated fees. Fees do not apply for obtaining quotes for the following:

- Seasonal lawn care (landscaping)
- Seasonal snow removal

The Board should not complete the online *Quote Request Form* if estimates are needed for the items above. We have specific processes in place to handle the estimate gathering for these items.

NO FEES FOR SERVICE VISITS

There are no fees associated with coordinating and dispatching a vendor to repair an issue at your property. The online *Quote Request Form* and associated fees only pertain to situations in which a project requires advanced estimates from one or more vendors.

FEE SCHEDULE

A minimal fee will be charged for each project estimate required by the Board. The standard pricing is listed below. Your contract may contain different pricing.

Number of Estimates Required	Fee
1	\$50
2+	\$100 for each additional estimate

(Your management contract may include a specific number of quotes, per year, that are provided for no additional fee. Reference your management agreement for further details.)

VENDOR SELECTION

As always, the Board is able to specify any vendor of their choice to produce an estimate. Should the Board not have a preferred vendor, Connected will involve one or more of the companies that have performed work on behalf of our clients in the past.

**The Board will make this distinction in the *Quote Request Form*.

It is important to understand that Connected does not have contractual relationships with vendors, we do not accept financial compensation from these companies, and provide no guarantees or warranties of any kind related to their work. We cannot guarantee that any vendor's estimate will meet the expectations of the Board, including:

- The scope of work being recommended
- The price
- The quality or thoroughness of the estimate

The Board is responsible for the fee whether or not the vendor is hired and/or if the Board is satisfied with the estimate(s). We will work with the vendors on the Board's behalf to ask for clarifications or improvements to an estimate, but we have no ultimate control over 3rd party companies.

ONSITE VISIT COORDINATION

In order for a vendor to produce an estimate, they may require access to secured areas of the building. In the *Quote Request Form*, the Board must select one of the following options related to providing the vendor(s) with access to the property:

- 1) **Vendor to obtain keys from Connected and visit building** – We will coordinate with the vendor so that keys are picked up from our office and the vendor will visit the property directly. This assumes that we have the keys to the associated areas of the building needed.

**Important – This option is not available if access within one or more of the owner's units is required.

- 2) **Board or Owner will meet Vendor** – We will coordinate for the vendor(s) to meet with a Board member, unit owner or other person specified in the form.
- 3) **Vendor will visit building. No keys are required.** – We will coordinate with the vendor to visit the property. This is only a workable solution if keys are not required to access the areas of the property needed to produce an estimate.

**The Board will make this distinction in the Quote Request Form.

START THE PROCESS

To initiate the process of having one or more estimates obtained on your behalf, you must complete our online *Quote Request Form*:

<http://quotes.connectedmanagement.com>

BOARD COORDINATED QUOTES

The Board may also elect to coordinate with a vendor directly to obtain estimates as needed. To facilitate this we have made a list of vendors available:

<https://www.connectedmanagement.com/documents/VendorList.pdf>

There are many other sources of vendors and this list is by no means all encompassing.