

Exhibit D

Contractor & Vendor Management Process

Site Maintenance Manager's Responsibilities and Process

1. **OBJECTIVE:** Define Site Manager's (SM) oversight and management responsibilities and processes for work performed by contractors & vendors on the Complex to ensure a proactive, responsive, accountable program to maintain and enhance Lake Forest's capital assets.
2. **CONTRACTOR/VENDOR QUALIFICATION:** Site Maintenance Manager (SM) shall prequalify, solicit hourly time and material rates, obtain references, as needed, and recommend at least 3 Contractors/Vendors for each service category needed for approval by the maintenance committee and the Board. Once approved, this category-specific list will be the "Pre-Approved Contractor/Vendor List." Rates for these Contractors/Vendors shall be updated every three years.
3. **MAINTENANCE PROJECT BIDDING:** Unless otherwise directed by the Board President or designated Board Representative (collectively, BP), the SM shall solicit bids for approved maintenance projects (with defined scopes of work) from at least 3 Contractors/Vendors for review by the Maintenance Committee and approval by the Board.
4. **OVERSIGHT AND MANAGEMENT:** SM shall oversee and manage approved Contractor/Vendor services: this responsibility includes scheduling Contractor/Vendor services, meeting with Contractor/Vendor on site prior to work commencing to review scope of work and means and methods, coordination with home owners and HOA activities, inspecting the ongoing work, alerting the BP of any contractual or performance concerns, making corrective action as appropriate, verifying quality, completion and contract compliance, ensuring that no collateral damage has been done to any HOA property, and, finally, recommending payment approval/disapproval to Maintenance Committee and the Board of Directors.
5. **COMPLEX ACCESS AND SECURITY:** SM is responsible for coordinating, managing, securing and logging all key & code access required for HOA-approved Contractor/Vendor work on the complex, units & garages.
6. **COMMUNICATION:** SM shall be the primary point of contact with all Contractors/Vendors and all communications between the contractor and the Board or Committees shall go through and/or include the SM.
7. **CONTRACTOR/VENDOR PERFORMANCE:** SM shall verify that Contractor/Vendor meets all quality and performance expectations established by the Maintenance Committee. At the conclusion of a given Contractor/Vendor's scope of work, SM shall send an email, approved by and signed by the Board President, to the Contractor/Vendor with an appraisal of their performance, including positive and/or negative details and opportunities for improvement. concerning his performance.

REVISED: 4.23.2022

Board Approval Date: _____