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Contractors: A Property Manager's Guide

<i>Business Purpose</i>	<p>Garden Grove Apartments wants to familiarize its property managers with the process of hiring independent contractors and ensure minimized risk to the company when using independent contractors. The property owner has noticed over the past year that 25% of property managers are reaching out to him for guidance through the hiring and bidding process. Owners would like their managers to have a more solid understanding of this process so that they can navigate through it without assistance.</p> <p>Also, the company budget has depreciated over the past year due to legal disputes that occurred with the independent contractors that were hired. Property managers need to understand how to minimize risk by using contracts, payee options, payment and performance bonds, and certificates of insurance to prevent risk and financial loss to the company.</p>
<i>Target Audience</i>	Any property managers who will be responsible for hiring independent contractors to complete jobs on the property they manage.
<i>Training Time</i>	30 minutes
<i>Training Recommendation</i>	<ul style="list-style-type: none">• 1 eLearning course• eLearning is best due to property managers being spread out geographically and the information being concrete and low-level complexity• Course has a property manager teach the learner about their role in hiring contractors: how to find independent contractors, the different types of jobs they may need to hire them for, what the bidding process involves, and how contracts can minimize risk• The property manager gives pointers throughout as she is tasked with getting a roof fixed on the property she manages.• Two knowledge checks along the way• Final assessment
<i>Deliverables</i>	<ul style="list-style-type: none">• 1 eLearning course<ul style="list-style-type: none">▪ Developed in Articulate Storyline▪ Includes voice-over narration▪ Includes two avatars, a property owner (mature male) and a property manager for his apartment complex (young female)▪ Includes scenario-based learning in which PM takes learner through the experience of hiring an IC.▪ Final evaluation
<i>Learning Objectives</i>	<ul style="list-style-type: none">• Identify reasons to hire a contractor.• Describe the process of hiring a contractor.• Arrange the steps of the bidding process in the correct order.• Explain ways that contracts can minimize risk.

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Training Outline

▪ Introduction

- Property owner of Uptown Heights, Ted, welcomes the learner to the course and calls his property manager, Atsumi to check on things.
- Atsumi mentions that there is a leaky roof in one of the apartment buildings which she is thinking of hiring an independent contractor to fix.
- Ted agrees that is a good plan and asks if Atsumi can teach the learner about the process of hiring an IC since she is about to do so.
- Atsumi agrees and takes the learner to her office and asks for their name.

▪ Benefits of Hiring a Contractor

- Learner explores four benefits of hiring an IC.
 - Time Savings
 - Specializations
 - Financial Savings
 - Maintenance Staff

▪ Contractor Services

- Learner gets a quick overview of various services that IC's might be hired to complete on the property (ongoing or single, large-event jobs), by clicking on icons for:
 - Roofers
 - Electricians
 - Exterminators
 - Painters
 - Pool Techs
 - Housekeepers
 - Plumber
 - Landscapers

▪ Knowledge Check

- Learner chooses the only statement that is NOT an advantage to hiring an IC

▪ Finding Contractors for Hire

- Atsumi provides the learner with four different avenues for locating an independent contractor, that can be trusted, for the job needed.
 - Referrals
 - Apps and Websites
 - Better Business Bureau
 - Local Resources
- The learner will click on each of the above buttons and Atsumi will explain more detail about each one.

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▪ The Bidding Process

- Atsumi introduces the 3 steps of the process, and asks the learner to click through them to learn about what each one entails.
- Learner clicks through to learn details about each aspect of the Bidding Process:
 - **Scope & Specifications**
 - **Scope:** a general description of work to be completed and includes a timeline, milestones, and reports
 - **Specifications:** Descriptions of all the materials, equipment, and methods needed for the job. Includes the what, how, when, and where aspects
 - **Bidding:** Keep info private, look for quality over expense, solicit bids from multiple contractors, present all bidders with the same specifications
 - **Awarding the Contract:** Check references before accepting a bid, use BBB to check for any complaints previously made

▪ Knowledge Check

- Learner matches the steps of the bidding process in the correct order.

▪ Contract Information

- Atsumi explains that a contract is a legally-binding written agreement between two parties that creates an obligation to perform a particular service.
- She also shares facts about contracts such as using them to offer protection for herself, employees, and company.
- She explains that contracts can differ by local, state, and federal laws.
- She states that she will have an attorney review the contract terms for her roofing contract before it is signed.

▪ Minimizing Risks with Contracts (Accordion)

- Learners can explore the 4 ways to minimize risk with contracts.
 - **Lien Wavers-** ensure that claims cannot be filed against the property management company
 - **Multiple Payee Options-**secures payment for both parties

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	<ul style="list-style-type: none">○ Payment & Performance Bonds- insurance company or bank-issued bonds that guarantee satisfactory job completion○ Certificates of Insurance- protects from liability in the event of injury or damage caused by contractor negligence▪ Assessment▪ Summary▪ Congratulations
<i>Assessment Plan</i>	<ul style="list-style-type: none">• 5 assessment questions• Learner must score an 80% or higher to pass• Learner will have the option to review and retry the quiz if they do not pass• Question Types:<ul style="list-style-type: none">▪ Arrange steps of bidding process in correct order▪ Choose the benefits of hiring an IC▪ Best practices to follow when hiring an IC▪ Recognize the 4 ways contracts can minimize risk when hiring an independent contractor▪ Select all ways to locate IC's for hire