**EJF Lunch and Learn**

**February 25, 2021**

**Working with EJF (Board Member Tools)**

**What is the role of my Property Manager (PM)?**

 -Expectations

 a) Responsiveness – emails, Vantaca requests, phone calls

 b) Reporting – finance, vendor/project follow up

 c) Guidance – board matters, responding to owners, and other issues

 d) Physical building management – timely repairs, securing bids, inspections

 -Contacting the PM

 a) Vantaca – tracked and seen by most people

 b) E-mail – seen by PM and possibly APM

 c) Client Services – usually answered live, can often solve the issue or pass on message – 202-537-1801

d) phone call – managers spend a lot of time on the phone-low chance

 -What is the POD system?

 -a set of internal teams with a leader and weekly meetings

 -this is part of EJF’s overall EOS management system that emphasizes setting

performance standards, tracking results, and sharing those results with team members

 **-EMERGENCY 202-537-1801 – this line is covered 24/7/365**

**What is the role of the Assistant Property Manager (APM)?**

-Every POD has a Team of APMs supporting them; we have been using this system for about a year; still a work in progress

-Contacting the APM

 a) Vantaca – tracked and seen by most people

 b) E-mail – seen by PM and possibly APM

 c) Client Services – usually answered live, can often solve the issue or pass on message – 202-537-1801

d) phone call – APM spend a lot of time on the phone-low chance

**What is Vantaca?**

 -Vantaca is our main operating system-it is financial and work order oriented

-in Vantaca everything is an Action Item and each action is a “step”

-EJF as a company is moving more towards Vantaca and attempting to move out of email because Vantaca helps track items and can reach multiple parties

-All owners have an account in Vantaca (accessing the portal) where they can see their account, access documents, and send work orders or questions for managers

-My Contact Info- all owners should go online and check their profile

-Board members see an expanded Document library that includes:

-Documents

 -Financial Reports

 -Invoices

 -Bank Statements

 -Work Order

 -Lots more!

**Paying assessment – what are the options**

-ACH via EJF – sign up and never be late again!

-One-time or recurring via Vantaca – access through the portal

-Check (hand or bank) – the old fashioned way; will receive a coupon book

**What can we expect from Client Services? (Amanda)**

-Main contact for owners about accounts, log-ins, association questions, work orders, portal training, payments, etc.

-Phone number is 202-537-1801-this is the only number you need!!

 **Board Handbook**

 **Process for Financial reports**

 -Preliminary reports goes to PMs for review

 -Final reports are posted to folders by the 15th and email is sent to Board members

 -How to make changes—send info to your PM

 -A/R Reports

 **EJF Website**

 -Learning Center <https://www.ejfrealestate.com/associations/learning-center>

 a) Access to Lunch and Learn video recordings and supporting documents <https://www.ejfrealestate.com/associations/lunch-and-learn?hsCtaTracking=0a2c693d-d70a-4707-9bdb-fd3090bc35d1%7Cff8e3e31-f98c-4b68-bcdc-e19b2202e483>

 b) Access to Community Associations Institute