

## COMMUNITY SCHEME - PROPERTY PORTFOLIO MANAGER (PPM) Job Description / Responsibilities

**Overall description: Manage a portfolio of residential / commercial / mixed schemes. This includes, but is not limited to, the responsibilities listed below, which will be subject to change depending on work requirements. Management may from time to time request staff to assist in other areas within the company when necessary.**

**PPMs must refer to the Bellbuoy Intranet in respect of ongoing processes / responsibilities / templates / information – the Intranet is updated continuously as changes / additions become relevant. The PPM must ensure that only current processes / responsibilities / templates / information are referenced / used.**

The employee will be responsible for the following tasks:

1. Employee must have own vehicle for business transport purposes and Bellbuoy's policy with regard to attendance at scheme meetings included in the management agreement cost is:
  - (a) on comprehensive management we attend 5 governing body meetings (one being a procedural meeting held directly after the AGM) per scheme per annum plus 1 annual general meeting per scheme per annum;
  - (b) on limited management we attend 1 procedural governing body meeting per scheme per annum plus 1 annual general meeting per scheme per annum; and
  - (c) on financial management we attend no meetings.

All additional meetings are charged as detailed on the relevant service fee lists (refer intranet). Where the governing body in a particular scheme does not require our attendance at contracted meetings, we must be able to provide proof that the governing body was aware of what their contract entitled them to. All meetings, which may be subject to change, are scheduled by the PPM and noted in the minutes of the AGM.

2. Take cognisance of different management agreements / packages and charge for services where required.
3. Where required, arrange and attend additional meetings and ensure that the relative charges are advised and debited.
4. Prepare all documentation timeously, using the applicable software, in respect of notices of all meetings. Ensure that all matters relevant to each of your schemes are addressed with the governing body in writing. Where schemes are on comprehensive management these matters must be noted on the agenda, tabled at the meetings and decisions minuted. Where schemes are on limited or financial management the portfolio manager must be able to prove that they have provided all relevant information in writing to the governing body.
5. Arrange the venues for the various meetings – offer Bellbuoy boardroom facilities at no charge. If an outside venue is used ensure that, where applicable, the governing body is informed of any charges for hire of such venues.
6. Record all meetings on colour coded meetings and boardroom bookings lists, as well as on any other system introduced by the company. This is extremely important.
7. At meetings ensure that quorum requirements are met before meetings proceed. Where necessary advise regarding Act's requirements for reconvening meetings.
8. Take minutes at meetings, prepare and send to Management for checking within 5 working days. Once returned from checking distribute immediately to governing body / owners – this must take place within 7 working days of the meeting. If for whatsoever reason the above time stipulations cannot be met, this must be discussed with Management. This is vitally important and failure to comply with any time limits will be taken seriously.
9. Where required to do so, assist with managing the agenda for the meeting and ensure that those attending the meeting in question have no objection thereto. Meetings may only be recorded with the permission of those in attendance. PPMs must acquaint themselves with the relevant common law rules regulating meetings.
10. Attend immediately to any matters from the minutes requiring attention – not later than 3 working days.
11. Immediately paste minutes and any relevant documentation into minute book – refer also to reference to keeping of records below.
12. Where required to do so obtain quotations on behalf of clients, liaise with contractors, notify contractors and others of outcome of quotes. Take cognisance of different management agreements and charge for this service where required.
13. Attend to telephonic enquiries relating to community schemes and individual concerns within a scheme i.e. maintenance, levies, management accounts, governing body etc within reasonable time periods. Telephone calls must be replied to on the same day.

14. Timeous attendance of all incidents reported via pastel software and charge for this service where required.
15. Ensure the correct scheme information is published to the Bellbuoy website where relevant and charge for this service where required.
16. Advise owners in terms of the relevant acts (such as, but not limited to, the Sectional Titles' Act, Housing Development Schemes for Retired Persons Act, Companies' Act), Home Owners' Association constitutions and community scheme rules. Respond in writing to enquiries, by either e-mail or post and where required charge for consultation in terms of our service fees.
17. Keep up to date with any amendments to the various acts / rules, whether prescribed or scheme specific amendments, and advise on relevant sections of the act, regulations or rules relative to an enquiry – providing details thereof if necessary and where required charge for consultation in terms of our service fees.
18. Liase with professionals (engineers, attorneys, land surveyors, quantity surveyors, estate agents etc) regarding schemes within designated portfolio and where required charge in terms of our service fees.
19. Resolve problems where possible within a scheme whether between owners, governing body, contractors, body corporate, etc and where required charge for consultation in terms of our service fees.
20. Attend to correspondence from various community schemes, refer correspondence received to the governing body and advise, where required, on action necessary. Relay responses back to the writer and where required charge for consultation in terms of our service fees. This must also be recorded in the minutes of the governing body meetings where relevant.
21. Advise governing body of steps to be taken in terms of the relevant act / constitution / rules in order to ensure that actions taken are legally enforceable and keep all scheme records up to date in this regard.
22. In conjunction with the financial administrator annual estimates (budget), using applicable software, are prepared by the PPM, who is responsible for the submission of all the financial documentation to the governing body for approval.
23. Ensure proposed budgets are tabled timeously with governing body and that these are circulated to owners in time to implement changes. Ensure that Bellbuoy's required internal procedures (which might change from time to time) relating to implementation of new budgets are put in place.
24. Ensure that the relevant person in the administration division is informed immediately a governing body resolution relative to levies (normal or special) is taken to avoid any incorrect transfer figures being given or to allow figures already given to be amended where necessary. This is vital.
25. Scrutinise all accounts received from service providers and ensure these are correct before forwarding to the governing body for written authorisation.
26. Once approved follow normal company procedure for control and payment of creditors.
27. For Municipal accounts prepare monthly Excel spreadsheet (template available) to check any variations on accounts and, where necessary, liaise with the relevant Municipality to settle disputes in respect of accounts and other municipal related enquiries. Ensure that excel formulae are not overwritten manually.
28. Scrutinise and approve monthly management reports for each scheme in your portfolio and ensure that these are sent to the governing body along with all other monthly schedules/reports where relevant, such as municipal, legal collection reports and so on, by not later than mid-month. If necessary query any anomalies with the relevant department and have corrections done before sending out report and attachments.
29. Check bank balances on at least a weekly basis and (having put in place relevant instruction from the governing body to do so) transfer funds between accounts to ensure that schemes benefit from best interest rates. Also check before making payments to ensure there are sufficient funds available.
30. Ensure that after the year-end the financial administrator sends the audit files to the auditors timeously so as to give time for financials to be returned and sent out with AGM notices.
31. Scrutinise audited financial statements for schemes in portfolio and liaise with financial administrator and auditors on any queries.
32. Follow up with financial administrator on any queries relating to arrears, legal collections, etc. so as to ensure that overdue levies are collected on behalf of the schemes.

33. Prepare various resolutions (with the aid of templates on the Intranet) in terms of the relevant act and ensure that these are correctly finalised and filed with the relevant body, such as the registrar in sectional title schemes, the municipality in common law Home Owners' Associations, and so on, and where required charge in terms of our service fees.
34. Liaise with surveyor / surveyor general to ensure correct records are on file with regard to the specific scheme's plans.
35. Inform directors of new schemes and promote and encourage business growth.
36. Work with attorneys i.r.o. registration of phases in new developments and ensure all the necessary procedures, as amended from time to time, for the take-on of new schemes / business is handled correctly.
37. Where so required, obtain quotations i.r.o. insurance cover for schemes and assist on the submission of insurance claims to the relevant broker and settlement of such claims and where required charge in terms of our service fees. No advice may be given on insurance or financial information, for which a specific qualification is required.
38. Ensure that minutes are recorded, and forwarded where necessary to relevant parties, in respect of all meetings, even those not attended by Bellbuoy. The minute book must be kept up to date at all times.
39. Minutes, and any other relevant documentation, must be pasted into the minute book as soon as these have been returned from checking by Management.
40. Keep a detailed record of every scheme resolution passed (PMR 34) and current contract in place, fully updated and pasted into the minute book (at the back of each new book as it is opened).
41. Participate in problem solving and mediation meetings and charge for consultation in terms of our service fees where required; for example with respect to breaches of the Act, registration of exclusive use areas, calculation of levies, etc. Remember to keep professional contact at all times – do not become personally involved.
42. Update all records and circulate the new owners' package immediately, but no later than 3 working days from receipt of the documentation. Ensure that the new owner is timeously provided with all necessary information relating to rules, resolutions, etc and where required charge in terms of our service fees.
43. Ensure that all records (portfolio details list, resolution/contract list, schedules, etc.) are constantly kept up to date.
44. Attendance, participation and taking of minutes at the PPM meetings and timeous attendance of matters following from this meeting.
45. All communications (minutes, agendas, letters, circulars, etc.) must be prepared using Bellbuoy templates downloaded from the intranet (download templates each time, do not save and use again) where such template is available. Where an additional template is needed, please forward your ideas to Management. Please note all Bellbuoy templates are subject to copyright and must be protected by using the pdf tool – do not send unprotected documentation to clients.

**Summary: The position of Property Portfolio Manager is not limited to the areas listed and may, as need arises, be expanded upon. At all times the PPM needs to ensure that the general interests of schemes within their portfolio are taken care of in a professional and efficient manner, working where necessary in conjunction with the various Bellbuoy Divisions, and never forgetting the Bellbuoy claim that we are "leaders in property management" and that we really care about what we do. The Property Portfolio Manager is the first line of communication with the client and is the one who is accountable for decisions and actions taken.**

**Property Management offers an exciting and challenging career opportunity in a rapidly growing profession that is receiving increasing recognition.**

**Property Portfolio Managers are expected to undergo training / education to equip themselves with the necessary knowledge to fulfil the position they hold and will be expected to sign acknowledgement of the training facilities supplied to them by the company. Distance learning Courses offered by Paddocks Learning, accredited by UCT, are currently used for this purpose and in-house training is also given.**