



Reference Guide

Certified Apartment ManagerSM



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Industry Essentials

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Apartment Ownership

Forms of ownership

An investor’s financial goals and ownership objectives can dictate the type of ownership structure an investor selects. After the investor identifies their goals and objectives, an appropriate ownership structure can be selected. The table below describes the ways to own or invest in a property and the advantages and disadvantages of each.

Type	Description	Advantage	Disadvantage
Direct Ownership/ Sole Proprietor	One individual owns and manages the property.	Formation and dissolution of business is easy and has a low cost.	There is unlimited liability and limited ability to borrow.
Partnership	Two or more people jointly own and manage property.	Formation of business is easy and has a low cost. There is increased availability of capital and credit and retention of profits.	There is unlimited liability and potential difficulty in withdrawing investment from partnership
Limited Liability Partnership	The limited partners contribute capital but do not actively manage the business.	Liability is limited to the amount invested by each partner	There is a lack of uniformity in state laws. Some states have state insurance requirements. There is joint and several liability.
Limited Liability Corporation	Most LLCs consist of two or more members, but many states allow a single-member LLC.	An LLC, like a limited liability partnership, is recognized as a separate legal entity from its members. Ordinarily, only the LLC is responsible for the company’s debts.	Taxable in some states. There is a lack of uniformity in states governing LLCs.
S Corporations	A corporation that is taxed as if it were a partnership—the corporation’s income is taxed only as the personal income of the shareholders. This is an effective way to avoid double taxation while retaining the legal benefits of incorporation.	Shareholders can personally claim their share of losses incurred by the corporation to offset personal income.	There are a limited number of shareholders providing less flexibility in income allocation.

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Apartment Ownership, Continued

Forms of ownership, (continued)

Type	Description	Advantage	Disadvantage
Real Estate Investment Trusts (REITs).	Established by federal law in 1960. The purpose of a REIT is to allow small investors to pool their investments in real estate while also diversifying their risks, obtaining professional management and maintaining liquidity.	A REIT must, by law, pay virtually all its taxable income to its shareholders every year.	Investors have no control over when a company will sell its holdings or how it will manage them. REITs are fairly liquid assets
Tenants in Common (TICs)	A TIC is a form of real estate asset ownership in which there are two or more persons of an undivided fractional interest in an asset, where ownership shares are not required to be equal and where ownership interest can be inherited. At closing, each co-owner receives an individual deed to their undivided percentage interest in the entire property.	<p>This structure allows the deferment of capital gains tax that would be owed on a property that is sold.</p> <p>Also, provides a way for someone to be able to enjoy ownership in an institutional type property with a lesser investment.</p> <p>TICs have also become a vehicle for investors looking for a new "1031" exchange.</p>	<p>Disadvantages include the newness of the investment structure and thus liquidity is unproven.</p> <p>The TIC sponsor controls the hiring of the management agent and investors have no control over how the investment will be managed.</p>

Factors in Investment

Risk

Risk refers to the possibility of losing some of your initial investment. Safety in an investment means minimal risk or loss. An investor must decide how much risk they are willing to take and how much loss they can afford. Any investment, no matter how small, involves risk.

Common risks that affect multifamily housing investments include:

- general economic and market conditions
- job losses or job growth
- political climate
- supply/demand
- interest rates
- neighborhood conditions
- population changes
- household growth
- the interaction of a group of real estate investments in a portfolio, and
- the operations of the property itself

Risk is also associated with time. Long-term investments are generally considered riskier because they are subject to the impact of more risks over time. An investor will expect higher returns on a long-term investment because they face risk for a longer period of time and wants to compensate for giving up some safety.

Investments that have low risks, such as savings accounts or money market certificates, are typically associated with low returns. Conversely, when an investor chooses a riskier investment there is an expectation that the returns will be much higher. Low risk equals low return and high risk equals high return.

Income

The income factor refers to the expected income from an investment. To some extent, income depends on the amount of risk involved. Conservative investments, such as savings accounts and some bonds and stocks generally provide a predictable amount of interest or dividends each year. Riskier investments are perceived to have the potential of offering high returns. Income from investments may not always be in the form of cash. In some instances, an investment may act as a “shelter” against income taxes.

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Factors in Investment, Continued

Growth potential

To an investor, growth potential means their investment will increase in value. Investors looking for growth potential will look for opportunities to invest in expanding rather than stable or mature companies, businesses and/or markets. It is important to understand that investing for growth means that present income is given up for potential growth or future income, and that early returns may be low, as profit is reinvested in the business or property.

Liquidity

Liquidity is defined as the ease with which an asset can be converted to cash. An investor must decide how long he or she is willing to have money tied up in an investment. This will influence the type of investment chosen. Stocks may be considered a fairly liquid investment because they are easily sold. Real estate, on the other hand, is much less liquid because it is more difficult to find a buyer for an apartment community than a stock, for example.

Housing Types

Housing types

You will manage different housing types and you may encounter management tasks specific to those housing types.

Apartment buildings are categorized based on the demographic or market segment they attract and the purpose for which the buildings were constructed.

Conventional Market-Rate housing

Conventional Market-Rate housing refers to multifamily housing that has no rent restrictions or rent subsidies provided by a governmental or regulatory agency.

Affordable housing

Affordable housing refers to decent, safe housing made affordable for individuals who generally earn less than 60% of the Area Median Income (AMI). Affordable housing typically benefits from federal, state, or private subsidies.

Project based section 8

Project Based Section 8 is a type of affordable housing that provides rental subsidies for eligible residents residing in newly constructed, rehabilitated, and existing rental and cooperative apartment projects. Some rents are subsidized by HUD under Section 8 New Construction, Substantial Rehabilitation, and/or Loan Management Set-Aside (LMSA) programs. Assistance is "project-based," i.e. a subsidy is committed by HUD for the assisted units of a particular mortgaged property for a contractually determined period.

Low Income Housing Tax Credit (LIHTC)

Low Income Housing Tax Credit is an indirect Federal subsidy used to finance the development of affordable rental housing for low-income households. It is a dollar-for-dollar tax credit for affordable housing investments. It provides incentives for private investors to develop affordable housing for low income Americans. The LIHTC housing program currently accounts for approximately 90% of all affordable rental housing created in the United State. Unlike Section 8, LIHTC is administered by individual state agencies that ensure properties are in compliance applicable laws and regulations.

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Housing Types, Continued

Workforce housing

Workforce housing refers to affordable housing for households whose incomes are not sufficient to obtain quality housing that is reasonably close to where they work. It can refer to any form of housing, including single family homes and multifamily. The term is increasingly used by local governments, planners, developers, lenders and groups that are concerned with housing policy or advocacy.

Senior housing

Senior housing is any housing operated specifically for persons over the age of 55. It could include both conventional market rate and affordable housing. In some instances, senior housing may have supportive services that allow seniors to remain in their homes longer and “age in place.”

Independent living

Independent living is a type of senior housing that is designed exclusively for seniors and is meant to be “friendlier” to older adults. Independent living is also referred to as retirement communities. It is more compact and easier to navigate. It oftentimes includes some support services, but residents are expected to be able to care for themselves. Some recreational centers onsite provide programs for seniors.

Assisted living

Assisted living is a type of senior housing that offers help with some “activities of daily living,” including minor help with medications, dressing, bathing, etc. and is generally staffed 24 hours a day. It may include apartment-style living with small kitchens, or individual rooms.

Full service or continuing care retirement communities

A type of senior housing that includes independent living, assisted living, and nursing home care in one location. Seniors can stay in the same general area as their housing needs change over time.

Purpose-Built student housing

Apartment communities targeted specifically for college students. They can be garden-style, low-, mid- or high-rise and are generally configured around a shared living room and kitchen with private bedrooms. Some bedrooms also have their own private bathrooms while other units may have shared bathrooms. Apartments in student housing projects are leased “by the bed.” Many high-end student properties also have extensive amenities including fitness centers, pools, student rooms, game rooms, etc.

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Housing Types, Continued

Military housing

The Military Housing Privatization Initiative (MHPI) addresses a severe backlog in availability and adequacy of government housing for military service members. The MHPI was designed and developed to attract private sector financing, expertise and innovation to provide necessary housing faster and more efficiently than traditional military construction processes would allow. Military services are authorized to enter into agreements with private developers selected in a competitive process to own, maintain and manage military housing. The Department of Defense works with the private sector to revitalize military housing through a variety of financial programs including direct loans, loan guarantees, equity investments, or conveyance or leasing of land. Military service members receive a Basic Allowance for Housing (BAH) to cover housing costs so that they can choose to live in private sector housing or privatized military housing.

Condominiums

This is a form of ownership of an apartment in a building in which the units are individually owned. Owners receive a deed to the unit, including the right to sell, mortgage, etc. Condominiums include joint ownership of any common grounds, hallways, lobbies, and other common areas.

Co-Op

Cooperative housing is an ownership structure in which an association or corporation owns a group of apartments and the common areas for use by all the residents. Residents own a share in the co-op which entitles them to occupy an apartment (or townhouse) as if they were owners. They have equal access to the common areas and vote for members of the Board of Directors to manage the co-op. There are often restrictions on transfer of shares, limits on income, maximum sales price, etc.

Mixed Use

Mixed Use housing refers to single buildings or groups of buildings that combine multiple uses including residential, commercial, industrial, cultural, or institutional. Buildings are physically and functionally integrated and generally embrace “walkability” by providing pedestrian connections.

Extended stay rentals

Extended stay hotels offer apartment-style accommodations that are typically not available in standard hotels. They are also called “apartment hotels” and typically have suites with kitchens and laundry facilities. They are aimed at business travelers on extended assignments, relocating families, etc. and typically offer discounts for extended stays (beginning at 5 or 7 days).

Apartment Building Types

Duplex

A duplex is a building that has two separate apartment units, usually side-by-side units, but sometimes on two different floors. Each unit has its own separate entrance.

Triplex

Triplex buildings have three apartment units, divisions, or floors. Each unit has its own entrance, but there may be one main entrance into the building.

Garden style

Garden style buildings are typically no more than three stories with multiple apartments per story. Landscaped grounds surround buildings and are usually arranged with interior courtyards open at one end, with parking in front of buildings or along the perimeter. Each apartment has its own building entrance off of an open breezeway or shares an entrance via a stairwell and interior hallway that connects other units immediately above and/or below it. Each apartment occupies only one level. Garden apartment buildings typically do not have elevators.

Townhouse

Townhouse buildings are generally multi-story structures with units attached to each other side-by-side. Units often share common walls, depending on if they are in a center or end position. They can be grouped together as small units, such as duplexes or triplexes, or can be part of a larger community.

Low Rise

Low rise buildings are enclosed buildings that typically have no more than four stories. Some experts define low-rises as structures that are no more than 115 feet tall. Units are accessed from a common hallway; they may or may not have elevators.

Mid rise

Mid-rise buildings are enclosed buildings that have five to ten stories with elevators service each floor. Some have attached parking structures either below ground or adjoining the building.

High rise

High rise buildings are enclosed buildings that have more than ten floors with elevators service each floor. Residents enter through a common lobby and units are located on each floor off a common hallway. Most have attached parking structures either below ground or adjoining the building.

Apartment Types

Alcove

An 'L' shaped studio flat

- Generally, more spacious than typical studio apartments
 - Offers a bay for sleeping or dining
-

Basement Apartment

Located below street level and typically has a structure constructed over it.

Corporate Apartment

Fully furnished and equipped with all necessary resident amenities

- Typically used for a short term stay
 - Cost is typically equal to a stay in a hotel but has more space and is more convenient
-

Garage Apartment

Built using the same walls of a garage or above a garage

- Typically has a separate entry
 - May or may not connect with the main house
-

Garden Style Apartment or Flat

An apartment on one level with living room, kitchen, multiple bedrooms, and bathrooms; sometimes with a separate dining area

- Can be up to six bedrooms, but generally have one to three
 - The number of bathrooms can vary
-

Live/Work Apartment

Located in a mixed use residential/commercial building

- Often mixed with retail space or offices on the ground floor
 - Living areas are above ground floor
-

Loft

High-ceiling apartment that can range from a converted commercial building to a brand new luxury high-rise

- Typically has open floor plan with few or no interior walls and a second level sleeping area
-

Maisonette

A self-contained apartment usually on two floors in a house with its own entrance from the outside.

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Apartment Types, Continued

**Penthouse
Apartment**

An apartment located on the top floor of a multi-story building

- Generally considered luxury housing because of added amenities and views
-

**Railroad
Apartment**

A series of rooms are connected to each other, not directly but through a hallway

- Called “railroad” apartments because rooms are lined up like compartments of a train
 - Model was initially developed in New York City to solve overcrowding
-

Studio Apartment

A small apartment in which the kitchen, living room and bedroom are all in one room plus a full bathroom.

Financial Management

Reference Guide



Mortgage Loans

Mortgage loan definition

A mortgage, one of the most common sources of financing real estate investments, is a legal instrument that pledges a described property as collateral or security for the repayment of a loan under certain terms and conditions.

Types of mortgage loans

The table below describes the types of mortgage loans.

Type	Description
fixed rate	Traditionally, fixed-rate mortgage loans are made for long terms of 20 to 30 years and carry a fixed interest rate. Level payments, meaning the same dollar amount of payment, are made each period for the entire loan term. The payments are applied to the principal and interest owed until the loan is paid in full. This process is referred to as amortization. Commercial mortgage documents typically include an amortization table which details exactly how much interest and how much principal is paid with each mortgage payment.
variable rate	A variable rate mortgage or Adjustable Rate Mortgage (ARM) is a type of mortgage that has an interest rate that is adjusted periodically based on a financial index. The most common adjustment intervals range from one month to three, five and ten years.
balloon	A balloon mortgage behaves like a fixed-rate mortgage for a set number of years (usually five, seven or ten) and then must be paid off in full in a single “balloon” payment. Balloon loans are popular today and often used by those expecting to sell or refinance their property within a definite period of time.
bullet loan	Bullet loans are structured so that interest payments and the loan principal are paid off in one lump sum at a specified time. They may require monthly payments of interest. Bullet loans are frequently used in new construction and substantial rehabilitation situations where no income is received for a period of time from the property.

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Mortgage Loans, Continued

Mortgage terminology

The table below defines mortgage terminology.

Term	Definition
principal	The amount of money borrowed, or the debt not counting interest, left on a loan.
interest rate	The percentage of an amount of money that is paid for the use of that money for a specified time.
amortization	The process of retiring a debt or recovering capital investment, typically through scheduled, systematic repayment of the principal.
escrow account	A trust account set up by the lender into which the borrower must make payments. Escrow accounts are generally used to ensure that property taxes and insurance bills are paid, thus reducing the lender's risk. Not all mortgages include escrow accounts, but they are frequently used.
replacement reserve payment	Some loans require payments to a replacement reserve account. This is often the case with HUD insured or assisted properties and state agency financed properties. Lenders on market rate properties are beginning to require such accounts as a means for ensuring that money is available to maintain the property during the term of the loan.

Where mortgages are obtained

Mortgage loans may be obtained from:

- commercial banks
- finance companies
- savings and loan institutions
- insurance companies
- pension funds
- mutual funds, and
- the federal government through government sponsored enterprises or government chartered corporations, such as the
 - Federal Home Loan Mortgage Corporation (FHLMC) (Freddie Mac), Federal National Mortgage Association (FNMA) (Fannie Mae)

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Mortgage Loans, Continued

**Federally-
insured
mortgages**

The federal government insures mortgages through the Federal Housing Administration (FHA) and the U.S. Department of Agriculture's Rural Housing Services programs.

**Tax credit
financing**

State and local government programs offer tax credit financing (Section 42) and tax-free bond financing.

Annual Turnover Percentage

Total number of annual, physical move outs ÷ total number of apartments = Annual Turnover Percentage

Example

Assume you have a total of 360 units and a total of 295 physical move-outs.

Calculate the annual turnover as follows:

$$295 \div 360 = 82\% \text{ Turnover}$$

Note: The same unit may be occupied by several different residents in one year, thus, increasing your annual turnover percentage.

Annualizing a Number

(Number ÷ time period in months) x 12 = Annualized Number

Example

Assume you have 52 service requests recorded in January and 36 in February.

Calculate an annualized number of service requests for the year as follows:

$$52 + 36 = 88$$

$$(88 \div 2) \times 12 = 528 \text{ Annualized Number}$$

Average Effective Rent

(Actual Rental Income less any applied – Concession) ÷ Units Occupied = Average Effective Rent

Example

42 units leased @ \$495 = \$ 20,790

58 units leased @ \$525 = \$ 30,450

94 units leased @ \$652 = \$ 61,288

86 units leased @ \$605 = \$ 52,030

280 Total Units Leased = \$164,558

\$164,558 ÷ 280 = \$587.71 = \$588 Average Effective Rent

Average Renewal Increase

Average Effective Rent for Renewals – Average Effective Rent on Previous Lease

Percentage Increase = Amount of Increase divided by Previous Lease Rent

Example

The effective rate paid for the Previous Lease = \$470.

The effective rate paid for the Renewal Lease = \$505.

Renewal Increase = \$505 - \$470 = \$35

Percentage Increase = \$35/\$470 = 7.5%

Average Square Feet/Unit

Square footage of all specific unit types ÷ total number of units = average square feet per unit . This is a weighted average, not a simple average of floor plan size.

Example

Assume you have 62 two-bedroom units with 858 square feet and 27 two-bedroom units with 1242 square feet.

Calculate the average square feet as follows:

62	Units @ 858 square feet =	53,196
<u>27</u>	Units @ 1242 square feet =	<u>33,534</u>
89		86,730

$86,730 \div 89 = 975$ Average Square Feet per Unit

Capitalization/Valuation

Annual net operating income ÷ capitalization rate = value or

Capitalization Rate x Value = (Annual) Net Operating Income (NOI)

$$I/R = V$$

Capitalization rates are determined by the market and quality of the property and generally range from 6–10%

Example

Assume the annual Net Operating Income is \$675,000 and the market capitalization rate is 7%.

Calculate the value of the property as follows:

$\$675,000 \div .07 = \$9,642,857$ Value

Closing Percentage/Ratio

Total number of leases for the week ÷ total number of traffic = closing percentage

Example

Assume you have 16 visitors (traffic) to the property for the week and 4 of these lease. Assume one person was previously shown an apartment.

Calculate the closing percentage ration as follows:

$$4 \div 15 = 27\% \text{ Closing Ratio}$$

Cost of Advertising per Lease

Total cost of ad ÷ number of leases generated from ad = cost per lease

Example

Assume you place an ad in the newspaper that costs \$5,400 and the ad generates 32 new leases.

Calculate the cost per lease as follows:

$$\$5,400 \div 32 = \$168.75 \text{ per lease}$$

Cost of Advertising per Traffic

Total cost of ad ÷ total number of traffic generated from ad = cost per traffic

Example

Assume you place an ad in the newspaper that costs \$3,800 and 58 prospective residents respond.

Calculate the cost per traffic as follows:

$$\text{\$3,800} \div 58 = \text{\$65.52 per Traffic}$$

Economic Occupancy Percentage

To calculate the economic occupancy percentage, divide the total rent revenue (TRR) by the gross potential rent (GPR). First determine the total rent revenue (net rental revenue).

Example

Current Month GPR = \$250,000

Less Vacancy, Collection

Loss, Concessions,

Non-revenue units = -\$ 52,000

Total Rent Revenue (TRR) = \$198,000

$\text{\$198,000} / \text{\$250,000} = 79\%$ Economic Occupancy

Effective Market Rent

If all leases are signed at scheduled market rent and all concessions awarded via a lease addendum, then the calculation is as follows:

Market rent x number of months in lease term less total concession awarded ÷ number of months in lease term

Example

Market Rent = \$665

Concession – 1 Month Free \$665

$$(665 \times 12 = \$7,980) - \$665 = \$7,315$$

$$\$7,315 \div 12 = \$610 \text{ (rounded) Effective Rent}$$

Gross Potential Income (GPI)

To calculate Gross Potential Income (GPI), combine the sum of all occupied units at current lease contract rates plus all vacant units at scheduled market rents.

Example

250 unit community

230 occupied units at average monthly lease rent of \$759 = \$174,570

20 vacant units at average scheduled market rent of \$810 = \$ 16,200

Gross Potential Income (GPI) = \$190,770

Gross Potential Rent (GPR)

Gross Potential Rent (GPR) is the amount of rent that would be collected if a property was fully occupied and all residents were paying market rent.

Example

250 unit community

250 units at scheduled market rent of \$810

Total units X Average Market Rent = GPR

$$250 \times \$810 = \$202,500$$

$$\text{Gross Potential Rent (GPR)} = \$202,500$$

Hourly Rate on Annual Basis

Hourly rate x 2080 = annual salary

NOTE! There are 2,080 hours in a normal work year. This means working 5 days a week, 8 hours for 52 weeks.

Example

Assume your hourly rate is \$12.50

Calculate your annual "salary" as follows:

$$\mathbf{\$12.50 \times 2080 = \$26,000. \text{ Annual "Salary"}}$$

Calculate your monthly "salary" as follows:

$$\mathbf{\$26,000 \div 12 = \$2,167. \text{ Monthly "Salary"}}$$

Example

Assume Your Annual Salary is \$38,000

Your Monthly Salary is $\$38,000 \div 12 = \$3,167$ per month

Your "Hourly" Rate is $\$38,000 \div 2080 = \18.27 per hour

$$\mathbf{\text{Salary} \div 2080 = \text{Hourly Rate}}$$

Leasing Exposure

Total number of vacant units + total number of notice units – total number of pre-leased units = total exposure in units

Total exposure in units ÷ total number of units = exposure percentage

Example

Assume a 470 unit property with 26 vacants, 18 notices and 9 preleases.

You calculate the exposure units as follows:

$$26 + 18 - 9 = 35 \text{ Exposure in Units}$$

Calculate the exposure percentage as follows:

$$35 \div 470 = 7.5\% \text{ Exposure Percentage}$$

Month-to-Month Leased Percentage

Total number of month-to-month leases ÷ total number of apartments = percentage of month-to-month leases

Example

Assume you have 6 month-to-month leases and a total of 140 leases.

Calculate the percentage of month-to-month leases as follows:

$$6 \div 140 = 4.29\% \text{ Month-to-Month Leases}$$

Net Operating Income (NOI)

The total revenue that remains after all operating expenses, but before mortgage debt service and capital expenditures (or replacement reserve payments) are made.

Net Operating Income = Total Income – Total Operating Expenses = EGI – OE = NOI

Effective Gross Income (EGI) = \$873,769

Operating Expenses (OE) = \$474,646

$\$873,769 - \$474,646 = \$399,123$ Net Operating Income

Occupancy Percentage (Physical Occupancy)

Total number of (physical) occupied units ÷ total number of apartments = occupancy %

Example

Assume you have a total of 396 units and 308 units are occupied.

Calculate the occupancy percentage as follows:

$$308 \div 396 = 78\% \text{ Occupancy}$$

NOTE! Vacancy Percentage + Occupancy Percentage = 100%

Operating Expenses per Unit (Annual)

Total operating expenses ÷ total number of units = operating expenses per unit

Example

Annual Operating Expenses (\$825,000) ÷ 350 Units =

Operating Expenses Per Unit \$ 2,357 per unit per year (rounded)

Operating Expense Ratio

To calculate the operating expense ratio, divide the operating expenses by the Effective Gross Income.

Example

Effective Gross Income	=	\$3,410,700
Operating Expenses	=	\$1,325,743
OE/EGI	=	38.9% Operating Expense Ratio

Price per Square Footage

Total unit rental ÷ total square footage = price (rent) per square foot

Example

Assume the monthly rent on a unit is \$525 and the unit has 731 square feet.

Calculate the rent per square foot as follows:

$$\mathbf{\$525 \div 731 = \$.72 \text{ per Square Foot}}$$

Pro-rated Rent

To calculate the Pro-rated Move-In/Prorated Move-Out Rent, you must first calculate the daily rate. Most computer software systems use a calendar based pro ration method and round amounts to the nearest dollar. Prorated amounts lower than 50 cents are rounded down, while amounts higher than 50 cents are rounded up.

Daily Rate

Total rent ÷ Number of Days in the Month = Daily Rate

Pro-rated Move-In/Pro-rate Move-Out Rent

Daily rate x total number of days occupied** = Prorated Move-In or Pro-rated Move-Out Rent

****Make sure to count the Move-In/Out day as an occupied day!**

Example

Assume a resident occupies an apartment for 12 days in October and the monthly rent is \$690.

Calculate the prorated rent as follows:

$$\$690 \div 31 = \$22 - \text{Daily Rate}$$

$$\$22 \times 12 = \$264 - \text{Pro-rated Rent}$$

Projected Traffic Required to Meet Leasing Goals

Total number of leases needed ÷ average closing percentage = projected traffic needed

Example

Assume you need 14 leases and have an average closing ratio of 28%.
Calculate the traffic required to meet your goal as follows:

$$14 \div .28 = 50 \text{ Prospective Residents needed (traffic)}$$

Assume you have projected traffic of 60 and your closing ratio goal is 30%

$$60 \times .3 = \text{Leases Needed}$$

To reach your goal, you need 18 leases

Renewal Percentage

Total number of signed renewal leases ÷ total number of expiring leases = renewal percentage

Example

Assume you have 16 leases expiring and of those 6 people renew.

Calculate the renewal percentage as follows:

$$6 \div 16 = 37.5\% \text{ Renewal}$$

Total Leased Percentage

Total number of occupied units + total number of leased not occupied ÷ total number of apartments = total leased percentage

Example

Out of a total of 462 units, assume you have 312 occupied units and 10 units leased but not occupied.

Calculate the leased percentage as follows:

$$(312 + 10) \div 462 = 70\% \text{ Leased}$$

Total Rent Revenue (Net Rental Revenue)

The amount of Gross Potential Rent less rent lost from vacancy, concessions, collections loss and non-revenue units. Also referred to as net rental income.

GPR – current month vacancy, concessions, bad debt, and non-revenue units = Total Rent Revenue

Example

Property Monthly Gross Potential Rent	\$202,500
Vacancy Loss	(\$13,000)
Concessions	(\$ 1,100)
Collections Loss	(\$ 452)
Non-Revenue Units	<u>(\$1,250)</u>
Total Rent Revenue	\$186,698

Unit Type/Unit Mix Percentage

Total number of a specific unit type ÷ total number of units = percentage of unit type

Example

Assume you have 518 units and 340 of them are two bedroom units.

Calculate the percentage of unit type as follows:

$$340 \div 518 = 66\% \text{ Two-Bedroom Units}$$

Vacancy Percentage

Total number of vacant apartments ÷ total number of apartments = vacancy percentage

Example

Assume you have 385 total units and there are 62 vacant units.

Calculate the vacancy rate as follows:

$$62 \div 385 = 16\% \text{ Vacancy}$$

Variance Percentage

$(\text{Actual number} - \text{budgeted number}) \div \text{budgeted number} = \text{variance percentage}$

The variance percentage is the calculating of how much you are actually over or under your budgeted figures.

If an **expense** category is **over budget**, it is a **negative variance**

If an **expense** category is **under budget**, it is a **positive variance**

If an **income** category is **over budget**, it is a **positive variance**

If an **income** category is **under budget**, it is a **negative variance**

Example

Assume you collect income of \$1,800,000 versus a budgeted income of \$2,000,000.

Calculate the variance percentage as follows:

$$(\$1,800,000 - \$2,000,000) \div \$2,000,000 = -10\%$$

This (-10%) represents an unfavorable variance

Weighted Average Rent – Leased and Market

Example

Assume there are four (4) floor plans and 215 total units. Assume eight (8) vacant apartments (2 A-1, 3 A-2s and 3 Cs).

Floorplan	#	Avg. Leased	Avg. Market
A-1	40	\$420	\$450
A-2	75	\$525	\$580
B	20	\$695	\$725
C	80	\$775	\$820

Calculating Weighted Average Leased Rent

Multiply the Average leased rent of a particular floor plan times the number of leased units in that floor plan.

$$38 \times 420 = \$ 15,960$$

$$72 \times 525 = \$ 37,800$$

$$20 \times 695 = \$ 13,900$$

$$\underline{77 \times 775 = \$ 59,675}$$

$$207 \quad \$127,335$$

Add the totals together, divide by the total of all leased units

$$\mathbf{\$127,335/207 = \$615}$$

Calculating Weighted Average Market Rent

Multiply the market rate of a particular floor plan times the total number of units in that floor plan.

$$40 \times 450 = \$ 18,000$$

$$75 \times 580 = \$ 43,500$$

$$20 \times 725 = \$ 14,500$$

$$\underline{80 \times 820 = \$ 65,600}$$

$$215 \quad \$141,600$$

$$\mathbf{\$141,600/215 = \$659}$$

Add the totals together, divide by the total of all units

Marketing

Reference Guide



Advertising

Definition: **Advertising** is a non-personal promotion of your product, service or company in mass media that is openly paid for and/or sponsored by you.

Purpose The purpose of advertising is to increase the qualified traffic flow to your community and keep your apartments rented. Advertising is used to promote your product, service or company through a widely distributed vehicle.

Advertising makes potential buyers aware of your product or service and moves the potential buyer to action, such as:

- inquiring for more information
 - calling for an appointment, or
 - coming to your property for a site visit
-

Goals of advertising

The goals of advertising are to:

- establish and maintain an awareness and positive image of your company, products or services
 - create a real or perceived need for products or services
 - develop sales leads by pre-qualifying the customer
 - persuade customers that your products or services are the best for them
 - promote events, and
 - lead potential residents to rent in your apartment community
-

Fair Housing considerations

Reference: See Chapter 4: Fair Housing in Marketing and Advertising for information about Fair Housing considerations.

Consider potential residents

Understanding your potential residents' needs and wants will also help you in your strategy. Look at the demographics of your community including the average age, income, education, employment, or occupation of each resident. Household size relative to your available units will also play a very important part in reaching your target market. Determining the attitudes, lifestyles, and demographic characteristics of residents will be very beneficial to your community's marketing efforts.

Continued on next page

Advertising, Continued

Do's of effective advertising

Do:

- Consider the reader's point of view and make sure advertising is meaningful to the "end user." Use urgency closes in your headlines
 - Include hours of operation, location and information about the type of apartment community, as well as phone numbers, Web site address, or other contact information.
 - List price ranges
 - Provide specific directions and/or provide a map that make it easy for the reader to find your community.
 - Keep your ad simple, easy to read and unduttered.
 - Ensure all advertising contains the Equal Housing Opportunity logo.
 - Update your ads regularly to keep them current and fresh.
 - Give your Web address.
-

Don'ts of effective advertising

Don't:

- Use detailed drawings with the exception of floor plans which can be very effective in promoting interest a specific unit type
 - Mix several different typefaces or use hard to read fonts Don't have headline and text in the same size font
 - Use tacky graphics
 - Violate Fair Housing standards
 - Use the same slogans and descriptions as your competition
-

Continued on next page

Advertising, Continued

Advertising techniques

The following techniques can be used to advertise a property.

- Place an advertisement in the newspaper or apartment rental guides or magazines.
 - Post flyers on neighborhood bulletin boards located in Laundromats or grocery store entrances.
 - List available apartments with a service that provides a listing of rental units for a specific geographical area.
 - Partner with and list available apartments with a local real estate office or apartment locator service that handles rentals.
 - Post a notice with a university or on a community bulletin board.
 - Purchase an advertisement in apartment rental guides or magazines.
 - Post a notice with an online service. Post advertisements with Internet listing services, both local and on the national level.
 - Create a Web site and put the web address on every exposure to the public by every means.
 - Place business card size “merchant cards” with local shops, restaurants and business owners that advertise your community.
-

Advertising strategies

Advertising strategies refer to the very carefully considered approach you will take to letting the community at large know about your property. Strategy means connecting the advertising media with a message, a target or a goal. Advertising strategies should be focused on enhancing the value of your property through increased rentals, fewer move-outs, higher rents and better community image.

Test your strategy

To determine if your strategy will be effective, consider the following.

- Is it simple?
 - o Is it easy to understand and is the message clear and meaningful to your target audience?
 - Is it specific?
 - o Is it complete and concise and easy to understand?
 - Is it durable?
 - o Can your strategy be used over an extended period of time?
 - Does the strategy maximize your ability to advertise?
 - o Can great creative advertising come from your strategy?
 - o Does your strategy provide you the ability to generate powerful advertising?
 - Are the results measurable?
-

Continued on next page

Advertising, Continued

Realistic expectations

Keep in mind that even the best advertising strategy will not cover up a problem with your community. When choosing your advertising strategy focus in on the positive aspects of your community and /or services provided. You should strive to always identify, address, and correct any problems or issues within your control.

Marketing Tools & Advertising Media

A blended approach to marketing

There are many different marketing tools or advertising media to use. After careful consideration of the advantages and disadvantages of each tool, a good marketer will likely integrate several vehicles into the overall marketing plan.

Apartment publications & rental magazines

The apartment publication or rental magazine represents a highly targeted form of advertising. Often, individuals who are in the market for an apartment are aware of these publications and will seek them out.

Advantages

- Quality color and photo reproduction.
- Highly-targeted audience selection.
- Provides formatted or creative platform for ad layout allowing you to target a specific message to your potential customer.
- Long life span—“shelf life”.
- Are recognized by apartment shoppers as an easy to use resource.
- It is easy to track effectiveness of publication ads using ad displays or by placing a tracking mechanism in the body of the ad.
- Frequently includes listing in publication’s highly advertised Internet Web site.

Disadvantages

- Costs may be higher for the advertiser.
- Timing of reader exposure to your ad is less predictable.
- Usually requires a contractual agreement.

Considerations in choosing a publication

There are many magazines that are produced exclusively to promote apartment communities. When choosing which publication is right for your community, consider the cost, distribution, publishing dates, value added services (such as Internet listings) and contract flexibility.

Continued on next page

Marketing Tools & Advertising Media, Continued

Apartment publications & rental magazines (continued)

Characteristics of an effective ad

Advertising in apartment and rental publications can be formatted or creative depending on the magazine. Whichever you use, advertising should include information meaningful to the target audience such as:

- the name of your community
- the physical address
- telephone number and web addresses
- types of floor plans possibly including square footage
- directions, and
- features
- Community “tag line” - what sets your community apart from others?

Note: Interior and exterior photographs will also assist in most effectively pre-qualifying your customer.

Continued on next page

Marketing Tools & Advertising Media, Continued

Online or Internet marketing

The Internet has become a common resource for individuals preparing to purchase everything from books to automobiles. According to Nielsen/Net Ratings more than three (3) million renters per month use third-party, web-based property listings for everything from apartments to vacation rentals. Because it has local and worldwide reach, has the ability to be modified immediately, and is relatively inexpensive, Internet advertising has become one of the most effective marketing tools. Online social media including Facebook, YouTube, Twitter, and LinkedIn are additional sources of contact allowing people to make connections and share information and content online. Residents talk and use of social media allows management to join the conversation and make the most of it. Such sites might showcase videos and photos, list amenities, and provide an online community for residents to share information. The online classifieds site Craigslist adds to outreach.

Three (3) ways to advertise on the Internet include:

- Registering your community or management company Web site with major search engines so Internet visitors can find you using specific keywords to direct the apartment shopper to your Web sites.
- Placing an “ad banner” for your site on another Web site that has a lot of traffic. Ad banners permit viewers to link to your site when they click on the banner.
- Partner with an existing apartment search Web site.

Advantages

- Cost effective
- Can target specific types of viewers
- Customer inquiries and changes to your ad can be timely.
- Ads can be interactive and present a particular image based upon the use of technology, colors, and design features.
- Apartment search sites provide a wealth of relocation services and information
- Prospects have no preconceived ideas of your community or location
- Many sites allow the renter to apply on line and reserve apartment homes 24/7 regardless of the office hours for the property.

Disadvantages

- Difficult to measure the impact of advertising though tracking devices can be implemented.
- The cost to advertise can vary greatly and Internet access is required.
- The Internet may not produce the number of leases that traditional print apartment advertising does in all markets, although the gap continues to close.
- The use of both sources has proven effective.

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Marketing Tools & Advertising Media, Continued

Newspapers

The newspaper can be a good form of marketing and an effective traffic generator. In some markets, it is the number one media for local advertisers in terms of where advertising dollars are spent. Newspaper advertising tends to be most effective when there are not other dominant “apartment only” publications in the market.

Note: Consider the use of a tracking mechanism to determine source effectiveness. Examples of tracking mechanisms include the use of a “fake” name within the ad such as “Call Suzy for more information” or “Present this ad for additional savings.”

Advantages

- Newspapers reach a diverse and broad audience.
- The target audience is locally and regionally based.
- Newspapers deliver timely messages because they have an established, regular publishing schedule such as daily, weekly or monthly.
- There is unlimited copy space in the newspaper.
- Readers can be actively involved in reading the paper.

Disadvantages

- Heavy competition due to the fact that newspapers are considered a primary medium by a variety of advertisers.
- Newspaper may not be popular with all demographic groups.
- It can be cost prohibitive in some markets for the type of ads that are needed to get attention among the other ads such as display ads.
- Limits specific audience targeting. You pay to reach the entire newspaper audience, who may or may not be looking for an apartment.
- Internet advertising has also diminished the role and effectiveness of newspaper advertising.

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Marketing Tools & Advertising Media, Continued

Newspapers, (continued)

Considerations in choosing a newspaper

When choosing a newspaper in which to advertise, consider the newspaper's circulation, distribution dates, size, cost and the kind of newspaper (i.e.: daily, weekly). This will help you make an informed decision when selecting a newspaper and choosing the most cost effective print media. Many properties opt to use smaller, neighborhood newspapers or even free "Green Sheets" that are available in local grocery stores. Although they impact a smaller readership, they can frequently be much more productive.

Characteristics of an effective ad

A good display ad can be reprinted and used in fliers, handouts, and mailers or even enlarged and used as a poster. Your ad can be entertaining, informative and it should keep your property name before the public. Keep in mind that the primary purpose of your ad is to sell and direct prospective residents to your property. An effective ad should:

- be easily recognizable
- be unique and stand out from your competitors (consider color (including your ability to use a reverse print to draw attention), what prints or fonts are available to you and style)
- get right to the point (you only have a few seconds to catch the interest of the reader before they move on to the next advertisement)
- include a strong call to action
- have a dominant headline
- use white space well
- clearly state percentages or range of prices, and
- create customer urgency.

Continued on next page

Marketing Tools & Advertising Media, Continued

Direct mail

Direct mail is one of the most targeted, measurable and cost effective ways to market your property. Your marketing message is delivered directly into the hands of prospective residents. Responses are tracked and an information base of prospective residents in need of housing is generated.

Direct mail entails marketing your property through letters, postcards and other types of mailers, such as special sales announcements. The four printed items to consider are the letter, the brochure or data sheet, the reply vehicle and the envelope. Direct mail is most effective at promoting the marketing message when the audience receives it at least three times.

In a direct mail campaign, you sell the benefits and features of living in your apartment community and generate a specific response.

To receive optimal response from a direct mail campaign, consider first the appeal of your message, based upon the needs of prospective residents, and the urgency of the call to action or response mechanism. The mailer should be distinctive and directed to a qualified, selected audience. Often, direct mail campaigns are specifically targeted to competitive apartment communities. While the appeal of reaching a primarily pre-qualified target market is strong, it must be carefully weighed against the likelihood of a retaliatory mailing to your community from the competitor.

Advantages

- Allows you to target your message to a specific and primarily pre-qualified audience.
- Delivers a timely message.
- Messages can be personalized to add reader appeal.
- Readers are actively involved.
- Database of leads can be maintained by tracking “return to sender” mail.

Disadvantages

- It may be viewed as junk mail.
- Response rate may be quite low (1-3%).
- Requires thorough maintenance of all mail lists.
- It can be a relatively expensive medium.
- May result in retaliatory effort from competitor.
- Typically delivers less than a 5% return on investment.

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Marketing Tools & Advertising Media, Continued

Visual traffic generators

Every time someone drives by your property an impression is formed. This impression is critical. Curb appeal can be used to attract potential residents by building a desire to live a certain lifestyle that the exterior of your property and apartment home emulates.

Simple things that can be done to improve curb appeal:

- Remove dead leaves and flowers.
- Maintain the appearance of flowerbeds using mulch or by turning the soil.
- Sweep entrances.
- Edge walks and curbs.
- Remove all trash.
- Trim trees and shrubs.
- Keep ID signs clean and freshly painted
- Paint the exterior trim of the apartment home.
- Install adequate exterior lighting.

Note: Other types of visual generators include landscaping, flags, banners, human directionals, and signage.

Directive brochures

Your property brochures should illustrate the features and benefits of living in your apartment community. Your brochure is important because prospective residents who are serious about living in your apartment community may want more information and will read it. Your brochure also provides credibility.

Electronic brochures are an excellent way to capture your electronic traffic. When communicating via e-mail, it is a significant advantage for you to be able to forward immediately an e-brochure and begin connecting your verbal and written images with actual pictures.

Continued on next page

Marketing Tools & Advertising Media, Continued

Radio and television

Radio and television provides flexibility and the ability to do either broad based or targeted marketing. This advertising source is usually the most expensive in absolute dollars, cost per traffic, and cost per lease. The most important and most difficult aspect of radio or television advertising is weighing the cost benefit of reach (number of listeners/viewers against frequency (how often the viewer/listener will hear the message).

Advantages

- Advertising is delivered to multiple household members simultaneously.
- Messages can be sent at any time during a 24-hour period.
- Full selections of program types are provided to reach viewers.
- Advertising can be purchased locally, regionally and nationally.

Disadvantages

- Audience size of given programs can change based on changes in programming.
- Generally requires high out-of-pocket cost to purchase multiple stations in order to reach the widest audience.

Comparison shopping

Shop and compare the rates of various network and cable options according to time slot and programming and compare their demographics with your customer profile.

Scripts

When developing a script for radio and television you should:

- mention the name of your property at least three times
- express urgency in your message
- create a slogan, and
- describe the features and benefits of living in your apartment community

Radio

Radio is a dynamic advertising tool that reaches huge audiences of potential customers. Local stations generally develop commercials for their clients, including copy and recording. Radio continues to play an important role in advertising and consumers' lives and habits.

Continued on next page

Marketing Tools & Advertising Media, Continued

Radio and television, (continued)

Advantages

- Radio messages are mobile.
- Allows for target selection based on geography and time of day.
- Your message can run with as frequently as you choose.
- Radio ad production is fairly simple for advertisers.

Disadvantages

- Radio has no visual.
- There is no hard copy for easy reference by the consumer.
- Air clutter is a problem.
- It is a “hit or miss” with your audience.
- Radio advertising on a major market station is often cost prohibitive.
- It is very difficult to track its effectiveness as a traffic generator

Television

Though often cost prohibitive, television has the highest residual value of any advertising media, because it reach the consumer with a visual and audio message. Net television advertising is extremely expensive although it provides the highest reach.

Cable television may provide a viable alternative for television advertising. A typical “flight” of commercials will run with greater frequency on multiple channels. However, cable television has segmented the market to such an extent that each channel has fewer viewers.

Shop and compare the rates of various network and cable options according to cost, time slot and programming and compare their demographics with your customer profile.

Continued on next page

Marketing Tools & Advertising Media, Continued

Radio and television, (continued)

Advantages

- Provides full-color advertising.
- Delivers advertising that can simultaneously be seen and heard.
- Allows delivery to multiple households.
- Provides for relatively immediate delivery.

Disadvantages

- Doesn't always allow viewer to take immediate physical action as a result of the advertising message.
 - It is often considered a background medium to which audiences are not always and continuously paying full attention.
 - Can be quite costly depending on when it is broadcast and what the market size is where it is being broadcast.
-

E-marketing

E-marketing is marketing by using tools on the Internet such as bulletin boards, and e-mail. E-marketing is becoming an effective way of advertising, communicating with existing residents and communicating with future customers

E-mail is another way to stay in touch with residents and with prospects. It is also a way to put your best foot forward and make a positive, professional impression:

- Be brief. Short e-mails are preferred to long narratives.
 - Answer the e-mail the same day, within hours if possible. This electronic form of communication has urgency built into it.
 - We mentioned e-brochures above, but make amenity sheets, floor plans, etc. into electronic formats as well for easy sending.
 - For a prospect, e-mail extensive information within 24 hours of the visit and AGAIN in three (3) days.
 - Be sure to include community updates, events and specials in your e-mails – consider this part of your “signature” area. Keep it current!
 - Proof and spell check e-mails before sending.
 - Stop e-mailing if a resident or prospect asks you to.
-

Marketing through other merchants and vendors

Marketing through local merchants and vendors, often called “outreach marketing,” can provide broad based or targeted marketing and can often be accomplished at little to no cost except collateral material. Frequently this form of advertising is handled as a “swap” – you accept flyers and coupons for the merchant’s service or product (i.e. dry cleaning, ethnic food, pizza to give to your residents and prospects, while the merchant distributes your flyer to customers.

Continued on next page

Marketing Tools & Advertising Media, Continued

Transit advertising

Transit advertising includes ads seen on buses at bus stops, subway cars and stations, on trains and in or on taxis. In high density metropolitan areas, this can be an effective method to develop awareness of your community. This advertising media is generally most effective when the physical location of the community is in close proximity to the transit systems and its vehicles.

Advantages

- Long exposure to one ad
- Large diverse audiences can see ads.
- Ads can be geographically targeted.

Disadvantages

- Design is usually limited to the size of frames or holders.
 - Transit ads are hard to target.
 - You may not have mass transit in your advertising area.
-

Outdoor billboard advertising

Billboard advertising is typically used for one of two purposes: directive or awareness. Directive billboards can be very useful for a community with close proximity to the billboard. Billboards can be a great method to provide simple directions such as “Turn at next left” or “3 miles south on the right.” Awareness billboards usually present a concept, a lifestyle, or a photo and are very difficult to track results. Rarely will a prospective resident call or come in and say “I just saw your billboard.” However, close monitoring of traffic sources should allow some measurement of return on cost.

Advantages

- They attract attention.
- The ad has impact.
- The ad reaches lots of people.
- Advertising is seen every day.
- Ads can be tailored to reach specific audiences.
- Tends to more effective as a directional or for brand awareness than as a traffic generating source.

Disadvantages

- Difficult to measure its effectiveness.
 - Can be costly based on location of the billboard.
-

ABC Company Marketing Plan Sample

OBJECTIVE

Maintain residential occupancy at 95%.

GOALS

- o Rent 1000 apartments.
- o Renew 68% of expiring leases.
- o Increase closing ratio to 65% average.
- o Have four rental consultants on staff and hire an additional person to help with renewals and as a back-up for leasing.
- o Implement average market increase of 8% during 2006, and renewal increases of 5-7%
- o Increase number of residents in Moderate Income program by 1%.

TARGET (In addition to an overall affirmative marketing campaign):

- o Professional men and women, 25 - 45, where location is the number one priority - walk to work, commute by train, or commute via tolls and expressways.
- o Suburbanites who work downtown and might consider moving for convenience.
- o International and out of state people being transferred.
- o Students from law schools and colleges in the area.
- o Residents from local hospitals.
- o Moderate Income Program.

RESIDENT PROFILE

- o Average age (unless age is a protected class in your state)
- o Average income
- o Median income
- o Average rent
- o Employment location (unless source of income is a protected class in your state)
- o Former address

TRAFFIC SOURCE

- o Resident Referrals
- o Newspaper
- o Internet
- o Area hospitals, schools and businesses
- o Word of mouth
- o Relocation firms

COMPETITION

MARKETING STRATEGIES

ADVERTISING OVERVIEW

INTERNET

Since a large number of our new residents come from out of state (which includes other countries), the Internet has become a vital tool and is surpassing leads received from traditional sources. The following needs to be considered:

- o Leasing needs the capabilities to be able to scan documents, floor plans, etc. People from another country or out of state should be able to receive all information and documents through the Internet. Upgrading and purchasing of computer equipment is necessary.
- o New marketing sites are continuing to become available on the Internet. ABC needs to add to these Internet sites throughout the year and consistently update information.

NEWSPAPER ADS

- o Promote awareness of our apartment community through memberships and advertising in neighborhood organization.
- o Ads placed in other publications periodically.

OUTREACH PROGRAM (in addition to overall affirmative marketing campaign)

- o Brochures are mailed to hospitals and schools in the area, who are using these as part of their mailing to incoming students and employees.
- o The rental staff is participating in open houses and job fairs onsite at ABC and at hospitals and schools in the area.

INCREASE OCCUPANCY

Because of the high volume of move ins and move outs during the peak leasing months, the freight elevator cannot accommodate all requests. Also maintenance struggles to have the apartments prepped as quickly as leasing needs the apartments. The following measures have been put into place to accommodate move-ins and increase occupancy:

- o Residents moving in mid-month, will have leases ending on the 15th of the month instead of the end of the month. This will give Leasing more
- o Availability mid-month to rent apartments. This also allows the workload to be more evenly distributed for the maintenance, move in coordinator, etc.
- o Eighteen-month leases will be offered to renewals during certain months throughout the year in order to move the lease end dates to months where there is the most demand for apartments.
- o Six-month leases will be offered in the winter months when rental activity is the slowest. The renewals for these leases will come up in the spring, when the demand for apartments is increasing. An additional fee will be charged for the six-month lease.
- o The short-term extensions will be eliminated. A one-time only final extension will be offered to accommodate homebuyers, etc. A fee will also be charged.
- o Apartment transfers will have some restrictions. If the transfer is done mid-term, a fee will be charged. If the transfer is at the end of the lease term, no fee is charged. All transfers must sign a one-year lease.
- o Discounts will be assigned to apartments where construction noise can be heard by residents.

RESIDENT RETENTION

MOVE-IN

Move-in coordinator schedules an orientation with the new resident and presents the following:

- o Benefits list
- o Move-in questionnaire
- o Welcome card
- o 30 day guarantee
- o Suggestion card
- o Resident survey
- o Property handbook of rules and safety procedures
- o Move-in gift

The move-in coordinator works on Saturdays mid-month and month-end when necessary in order to accommodate large numbers of move-ins.

Calls are made to each resident twice a year to check if there are problems that can be resolved before the next renewal.

The 30-day guarantee should be revised requiring the resident to live in the apartment for 30 days before having the option to cancel the lease. The notice of cancellation should be sent to the manager of the property.

RENEWALS

The goal in 2006 is to achieve the highest renewal retention rate possible. The following options will be available in order to achieve this goal:

- o Each resident will be given a renewal gift.
- o Free health club privileges for 5+ year residents.

- o Residents will be offered carpet shampoo or replacement and/or apartment painted, kitchen floor replacement or installation of shower door mirrored closet doors or hardwood floors in entry.
- o The renewal coordinator works one evening a week in order to reach residents when they return from work.

RESIDENT FUNCTIONS

- o Each month there is at least one function at ABC.
- o Resident Appreciation Days each quarter: staff greets residents when they return from
- o Work with refreshments, scheduled in each tower.
- o Resident Parties:
 - o Summer party
 - o Holiday party in December
- o Various outings and seminars include: gambling casino, restaurant outings, sporting functions, etc.
- o Children's parties for various holidays (winter holidays, Halloween, summer party)

CUSTOMER SERVICE

- o All ABC residents and prospective residents are offered automatic rent payment capabilities for their convenience.
- o ABC offers residents one-stop shopping for cable, telephone, fax, etc. Plus high including high speed Internet.
- o Twenty-four hour maintenance response to normal work orders.
- o Office hours on Saturday extended to accommodate residents needs and a representative from management is available all day.
- o Resident Service Representatives work at the third floor Service Desk Entry Station to offer assistance during the busiest times at the Service Desk.
- o Property questionnaire is sent after each work order is completed. Other property surveys are sent 30 days after move-in, and 30 days before move-out by General Manager.

CHARITABLE ENDEAVORS

Donation and support for events such as:

- o Food and clothing drives annually.
- o Y-me Breast Cancer Awareness.
- o Annual toy drive for shelters of homeless mothers and children.

REFERRAL PROGRAM

Resident referral brochures continue to be a high source of traffic to the building. We will:

- o Distribute the brochure highlighting the program to all residents.
- o Include it in each move-in package and it is also highlighted in the resident newsletter.
- o Keep copies in the reception area of the leasing office.

APARTMENT REFERRAL SERVICES AND BROKERS

- o Apartment availability is faxed to the various offices weekly.
- o Updates of rental changes are regularly sent to brokers.

COMMUNICATIONS

- o A bi-monthly newsletter announces events in the building and the area.
- o Brass 8 ½ x 11 window frames are displayed in each of the four tower lobbies by the elevators where announcements can be posted for the residents benefit.
- o A plaque in each tower lobby lists the management and maintenance personnel responsible for that particular tower.

BUILDING PHYSICAL IMPROVEMENTS 2006

- o Replace health club roof
- o Replace health club wood planters
- o Replace 3rd floor ceiling tiles
- o Service/Security desk remodeling
- o Health club remodel/re-tile women's locker room

XYZ Company Marketing Plan Sample

STUDY OF LOCATION

- Site Location
- Ingress & egress
- Visibility
- Direct neighbors
- Aesthetics of surroundings
- Negatives to overcome
- Positives to play on
- Other

SITE NEIGHBORHOOD

- Shopping
- Amenities (parks, golf clubs, lakes, etc.)
- Entertainment (sporting events, theatres, museums, etc.)
- Negatives to overcome
- Positives to play on
- Other

CITY/REGION

- Employment
- Transportation
- Realtors, relocation companies
- Schools, universities
- Other

ANALYSIS OF LOCATION/CONCLUSIONS/IMPACT ON PRODUCT

PRODUCT EVALUATION

Rental Information Center

- Location
- Identification/signage
- Appeal
- Traffic handling and overflow traffic design
- Closing area
- Privacy area
- Recommendations/changes/work-arounds

Clubhouse

Models

- New product or rehab - basic of each basic size (1, 2, 3) if possible
- "Hard to rent" types
- Needs/changes

Ready apartments

- Impeccable
- Types available
- Inspected prior to showing
- Unrented
- "Ready" system
- Problem resolution

Amenities

- Detailed product information
- Established rules and guidelines
- Route established to demonstrate
- Amenity readiness/clean-up
- Problem resolution

New Product additional requirements

- Professional site rendering
- Professional floor plan drawings
- Amenity plan renderings
- Other items needed

STAFFING

- Determine Appropriate Staffing Levels
- Staff leasing training
- Leasing personnel study of the market
- Training on compared features in the market; overcoming negatives and positively comparing features
- Staff shops and review of shops (at least quarterly)

EVALUATION OF COMPETITION

- Comprehensive market study of all existing and planned comps
- Rent comparison and evaluation
- Amenity fee comparison and evaluation
- Comparison of discounts, specials, fees
- Value-added components
- Floors
- Views
- Features
- Other
- Establishment of opening rents, discounts, fees
- Rent review schedule

TARGETED DEMOGRAPHICS

- General Information
- Income requirements
- Floor plan sizes/household sizes
- Employers
- Other

DEMOGRAPHICS OF AREA

- Chamber/city information
- MSA information
- Apartment study information
- Other

MARKETING SOURCES TO CONSIDER AND RESEARCH

Determine Advertising/Marketing Theme

Advertising resources to evaluate and consider: Carefully select only those appropriate to the asset and marketing strategy

- Newspapers
- Special newspaper inserts
- Billboards
- Apartment magazines
- Apartment locators
- Internet
- Yellow pages
- Radio
- Flyers
- Direct mail
- Banners
- Flags
- Signage
- Directionals
- Bandit signs
- Brochures
- Business announcements
- Chamber publications
- Public areas
- Businesses to cross-market
- Hotels and Restaurants
- Groceries

- Specialty stores
- Coffee shops
- Book stores
- Dry cleaners
- Other
- University Graduate Centers
- Library resource centers
- Area maps
- Cross marketing with area apartments with limited availability
- Chamber maps
- Other

CORPORATE MARKETING

- Targeting employers
- Develop appropriate materials within property's theme
- Establish person/department
- Personal contacts/visits
- Follow up mailings
- Reward system for referrals
- Regular mailing/newsletter

REALTOR/LOCATOR PROGRAM

- Target realtors and locators
- Develop appropriate materials within property's theme
- Establish fee system
- Make visits/presentations
- Follow up mailings
- Open house for realtors
- Regular mailing/newsletter

ANALYZING TRAFFIC

- Detailed daily phone and visit reports
- Weekly leasing summary
- Weekly evaluation of traffic amounts

- Weekly evaluation of traffic sources
- Weekly leasing results
- Weekly action plan
- Comparable traffic and leasing results comparison (weekly or monthly depending onsite needs)

RESIDENT RETENTION-A CRITICAL FOCUS

Current Resident Satisfaction

- Surveys with prompt responses and follow up
- Focus group to assess current resident needs
- Review communications
- Newsletters
- Letters
- Onsite instructional signage
- Amenity policies
- Special event notices
- Other
- Make corrections as necessary
- Work order follow up - Call EVERY resident for satisfaction
- Birthday/special resident day flags in computer
- On-going communications
- Newsletters
- Resident activities/seminars
- Changing services/amenities
- Annual service/satisfaction surveys
- Birthday/special event notices
- Other

LEASE RENEWALS

- Review expiration dates/expired leases
- Compare market rents/lease rents
- Review month to month leases
- Determine renewal plan/rates/terms

- Determine renewal incentives
- Lease renewal bonus plan
- Thank you follow up to renewing residents

ACTION PLAN, DATES, PERSONNEL ASSIGNMENTS

- Actions/assignments based on recommendations above
- Follow up system/Follow up coordinator

Property Maintenance

Reference Guide



Assigning and Evaluating Work

Purpose of this topic

Your Maintenance Supervisor will likely oversee daily and routine maintenance tasks. He or she will know what work is appropriate for specific individuals. On occasion, you and your supervisor may determine an outside contractor will be required to do the work. Further discussion about working with contractors is presented later in the chapter.

Our focus of this topic is to understand how to assess each staff member's skills and then match the work with the correct skill set.

Evaluating performance

Overseeing the evaluation of the maintenance team's performance is an ongoing task. Ask yourself questions such as:

- Is the employee properly assigned work for his skill level and experience?
- Is the work completed correctly and in a timely manner?
- Are any problems the result of lack of knowledge or lack of performance?

Good record keeping will provide you many sources of information to evaluate performance.

Reviewing and summarizing service requests

Service requests are important tools to help answer your questions. Part of your responsibilities may already include completing a weekly service request summary for your supervisor. Even if it is not required, it may be advisable to keep such records for purposes of:

- performance appraisals
- preventive maintenance planning and
- budgeting

Reviewing and summarizing service requests will give you information about:

- when service requests are occurring
 - types of requests received
 - who needs service
-

Continued on next page

Assigning and Evaluating Work, Continued

Reviewing and summarizing service requests, (continued)

- average turnaround time for requests
 - status of vacant residences
 - cost of service/repair
 - technician work performance records
 - planning maintenance and repairs
 - training and/or adding staff
-

Contents of a service request form

Service request forms should contain:

- Resident name and address
- Date and time of request
- Repair or maintenance requested
- Permission to enter
- Name of service technician assigned
- Description of work completed
- Action taken: pre-inspection/work completed/repared temporarily/parts replaced/parts ordered
- Follow up needed (if any)
- Estimate of cost incurred
- Amount of time spent for service/repair (time in and time out)
- Follow-up call with resident or post-inspection

Some service request forms automatically provide multiple copies. These are useful because one copy can be given to the resident, another copy to the Supervisor, and another copy can be filed in the property's resident and/or unit file. Similarly, service software programs provide such copies and computerized evaluations of work

Reference: See the Toolbox for a sample work request form.

Contents of a weekly service request summary

Weekly service request summaries may be maintained for each service technician and for the whole property. This is more easily possible with automated systems.

Continued on next page

Assigning and Evaluating Work, Continued

Contents of a weekly service request summary, (continued)

The type of information for each maintenance technician should include:

- Name and job title
- Number of service requests completed
- Types of work performed
- Total number of hours worked
- Space for comments

The type of information for the property should include:

- Total number of service requests received
- Total number completed and pending
- Total number needing parts
- Total number remaining from previous week
- Total number of follow-up calls/inspections made
- Total number of emergencies handled
- Total number of make-readies cleaned, painted, repaired and completed
- Total number of preventive maintenance tasks completed and hours worked

Reference: See the Toolbox for a sample work request summary.

Work order tracking software

Today many properties use software programs that record work order assignments by type and employee. They capture information such as:

- who is being assigned what task(s)
- how many assignments are given in one day
- how many assignments are completed and how long did each assignment take
- how many call backs were made.

Several programs tie this software to locked key drawers so that it is mandatory to enter codes and descriptions before keys can be pulled. These programs provide both excellent reporting and effective key control.

Make-ready and maintenance software

Another change to onsite operations is the introduction of make-ready and maintenance software. These programs are designed to eliminate the typical “white board” make-ready tracking system and capture key information from work orders, including:

Continued on next page

Assigning and Evaluating Work, Continued

Make-ready and maintenance software, (continued)

- type of service
- who performed the service
- how quickly the service was done
- what parts were used (and how that affects shop inventory) as well as
- follow-up on repeat service calls
- identifying failing building components and
- targeting preventive maintenance.

These programs allow companies to schedule, budget, allocate and track resources necessary to turn over units as well as make repairs. Naturally, the faster and more accurately a make-ready is done, the less down time and lost rent is incurred and the more likely the new resident will be able to move in on time. No call backs for service after the move-in remains the objective.

Some of these programs even interface with property suppliers and can help in scheduling outside contractors or ordering supplies.

Manual tracking systems

Some properties may not have sufficient computer capability for maintenance personnel or they may decide that they do not wish to incur the cost. Therefore, manual tracking systems remain the norm in many companies.

Managing Inventory

Importance of inventory management

Material purchasing and managing inventory contributes to the Net Operating Income and consequently adds value. Maintenance and repairs can be handled more efficiently when tools or parts are readily available.

Who is responsible?

The Maintenance Supervisor, under the direction of the community manager, is responsible for maintaining an inventory of frequently used parts and supplies and balancing the expense of the inventory with the timing of the need.

Standard inventory

Standard inventory includes items that are used frequently. Items that are used infrequently, or that are extremely expensive, are not normally included in standard inventories.

Keeping costs down

Purchasing items in bulk and standard sizes can help reduce inventory costs, yet large inventories can be difficult to maintain and control. Keeping more than one or two extras of major appliances does not make sense nor is space likely available for storage.

Product knowledge can save you time and money. You may work with your Maintenance Supervisor in developing your inventory items and “shopping list,” but it is essential that you understand each of the items and their role in your everyday maintenance of exteriors, interiors and apartment units.

In addition to understanding maintenance terminology and industry or common names, managers must understand the concepts of comparative shopping. It is much like shopping for weekly groceries or big-ticket items like refrigerators.

Comparing quality, cost, size and supplier

Assume you need to purchase garbage disposal units for the property. You have read Consumer Reports to narrow down your purchase to one brand, but learn there are generally three (3) grades in every tool, supply and part that you buy:

- Basic—least expensive, short life expectancy.
 - Slightly more expensive—more durable, and has stainless steel blades.
 - Heavy duty—most expensive, long life expectancy, all stainless steel parts.
-

Continued on next page

Managing Inventory, Continued

Comparing quality, cost, size and supplier, (continued)

To make your decision, you need to calculate the short and long-term costs – such as how often you will need to repurchase these items. You also need to consider the owner's maintenance goals, and then decide on the best value. Current equipment on the property should be considered. Should the same brand be used that was used when built or renovated. If an item has a relatively short useful life anyway, maybe top quality isn't necessary.

If your owner plans to improve the property on a minimal level and then sell the property, that goal will impact your purchasing just as the goal to upgrade and enhance the property for a long term hold would.

Buy what works best for you

Always buy in the quantity and size that works best for you. Constraints could be:

- a small shop area,
 - small budgets, or
 - mostly contractor work rather than in-house maintenance.
-

Storage of tools and supplies

Proper care and storage of tools and supplies is essential. A well-considered purchase of paint or a new hand tool for added efficiency will be poorly spent money if the paint cans are sealed poorly or the tool is left out in the rain.

Managers should consider the following.

- Controlling inventory costs is important.
 - Storage areas should be secure, conveniently located and properly organized to minimize the risks of theft and loss due to spoilage.
 - All OSHA standards should be followed for safety purposes.
-

Relationships with suppliers and contractors

An important task as a manager is to ensure that good working relationships exist with suppliers and contractors. This is often handled directly by the Maintenance Supervisor or Service Manager. Creating sound, ongoing business relationships benefit you and the supplier. These relationships may be especially helpful in emergency situations and when special products must be found.

Continued on next page

Managing Inventory, Continued

Relationships with suppliers and contractors, (continued)

The benefits are:

- Time saved because you trust the product and prices. (However, do not be afraid to get second opinions on costs, services, etc).
 - Suppliers who know your product and needs can suggest an appropriate selection of products.
 - Purchases are delivered.
 - Many suppliers measure and install products.
-

Vendor programs

Many property management companies and owners have developed national buying programs with certain vendors and suppliers. Many of the programs require certain levels of purchases in order to guarantee lower pricing levels. Rebates may be tied to required spending. A Community Manager must stay abreast of those purchasing requirements, including pricing structures and availability. It is important to purchase products that are in the best interest of the property. Do not always buy what is on sale that week.

Maintenance management software

Today there are maintenance management software programs that help:

- generate and track work orders.
- schedule preventive maintenance.
- produce inventories for parts and supplies.
- categorize expenses.
- analyze employee and contractor productivity; and
- provide histories for all property components.

These programs require significant upfront training but can be successful in lowering maintenance expense and improving property productivity. Many of these software providers are members of the local and national apartment associations and can discuss your needs.

Record keeping

Finally, and in all cases, no matter the level of sophistication, you should maintain good records to monitor purchases, keep warranties and plan future purchases.

Reference: See the Toolbox for a sample property inventory form.

Developing a Preventive Maintenance Program

Inspections and inventory

A good preventive maintenance (PM) program begins with a thorough inspection of the property and a list of all items that are subject to regular inspection. This list can be developed or updated by walking through the property and taking note of maintenance equipment, structural components and the condition of the landscaping.

To support the team approach, ask staff members to take part in some or all of the inspections.

Items to be included

Examples of items that should be included in a preventive maintenance program:

AC coils	Fences
AC condenser	Fire extinguishers
Balconies	Foundations/buildings
Blower motors	Furnace and A/C filters
Boilers	Gutters
Carpentry	Water heaters
Carpeting	Landscaping
Caulking	Lighting
Chimneys	Plumbing/fixture
Clubhouse & models	Pools
Common areas	Roofs
Culverts	Screens
Curb/sidewalks	Sewers/drains
Downspouts	Signage
Electric panel/switches	Smoke alarms
Entry gates	Sprinkler systems
Exterior surfaces	Stairs/Handrails
Exterior walls	

Establish tasks and frequency

After identifying the items subject to preventive maintenance, establish the tasks to complete each item and the frequency with which these tasks should be performed (daily, weekly, quarterly, etc.).

Developing a Preventive Maintenance Program, Continued

Create a maintenance schedule

The maintenance schedule includes the list of items that are subject to regular maintenance and the date when the preventive maintenance is scheduled. In addition to timing concerns (daily, weekly, monthly, etc.) seasonal maintenance must be considered part of the plan.

Climate and property location influence the items that must be on the list. Checking supplies for ice and snow conditions would be normal for a Chicago-area property, but not for one in the Tampa area.

Example:

Take a file box and fill it with 52 index cards (one card for each week).

On each card, record the PM tasks should be performed that particular week, using the information from your detailed inspection, including any manufacturer's special procedures and special tools, and noting any important safety issues.

Some tasks will be listed on multiple cards and done several times a year. For example, changing HVAC filters. If you change them four times a year, the task will appear on four cards, one for each week when the filters will be changed.

If you inspect your boilers thoroughly twice a year, you will have two cards in your file box telling you the week to do your boiler inspection.

Some items, like roofing, are inspected thoroughly only once a year so there will only be one card with roof inspection on it.

Reference: See the Toolbox for a sample preventive maintenance schedule.

Continued on next page

Developing a Preventive Maintenance Program, Continued

Helpful resources

The maintenance manuals provided by equipment manufacturers are invaluable when trying to create a maintenance schedule. The procedures in these manuals should be reviewed to determine if additional tests, repairs or inspections should be added which reflect the special use of the equipment in your facility. Warranties should also be kept on file.

Inventory records

It is important to keep inventory records. Should a theft occur, you would have the information you need to submit a claim to the insurance company.

You might consider having an engraver to engrave the property name on all tools and equipment.

Tickler file

A tickler file contains the use and care manual for every appliance, the equipment manufactures specifications of what type and how often PM should be performed, and all related information.

Each week, on Monday, management photocopies and staples a copy of that week's PM tasks file card and a copy of the tickler file information to the weekly PM work order.

Once PM is completed and inspected, written records are kept of the results and results are forwarded off-site and follow-up if necessary.

By mid-week, management follows up to ensure that the PM for that week has been started or to get a projection of when it will be done that week.

Continued on next page

Developing a Preventive Maintenance Program, Continued

Combining PM with regular maintenance

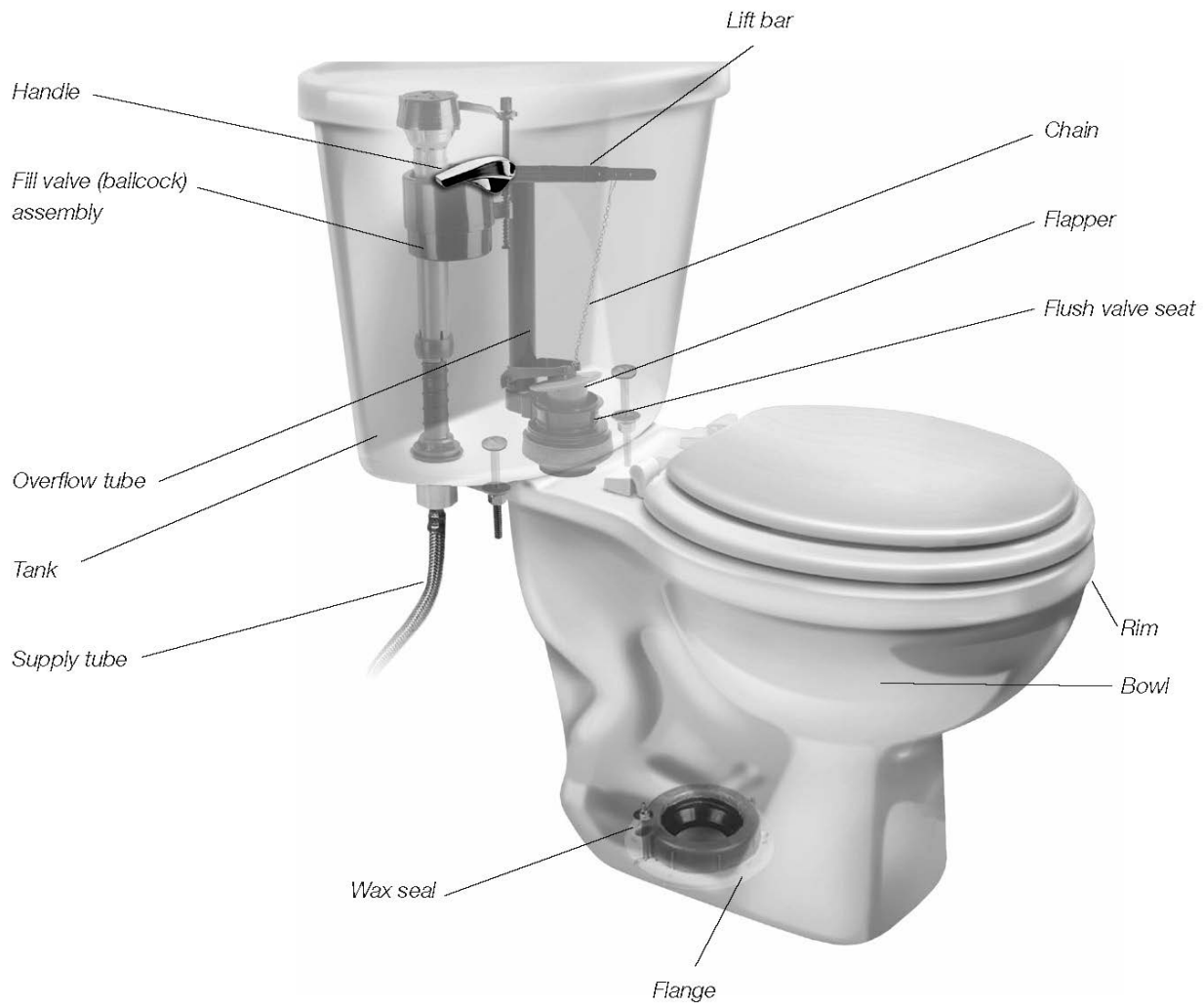
It is a good idea to combine PM with other regularly-scheduled maintenance tasks.

Example: Pest control is professionally performed in each apartment unit every three months (quarterly). You can combine the routine quarterly apartment inspection with HVAC filter change (which should also be done at a minimum of every quarter) with the pest control service. The maintenance technician or staff person visits each apartment with the pest control technician.

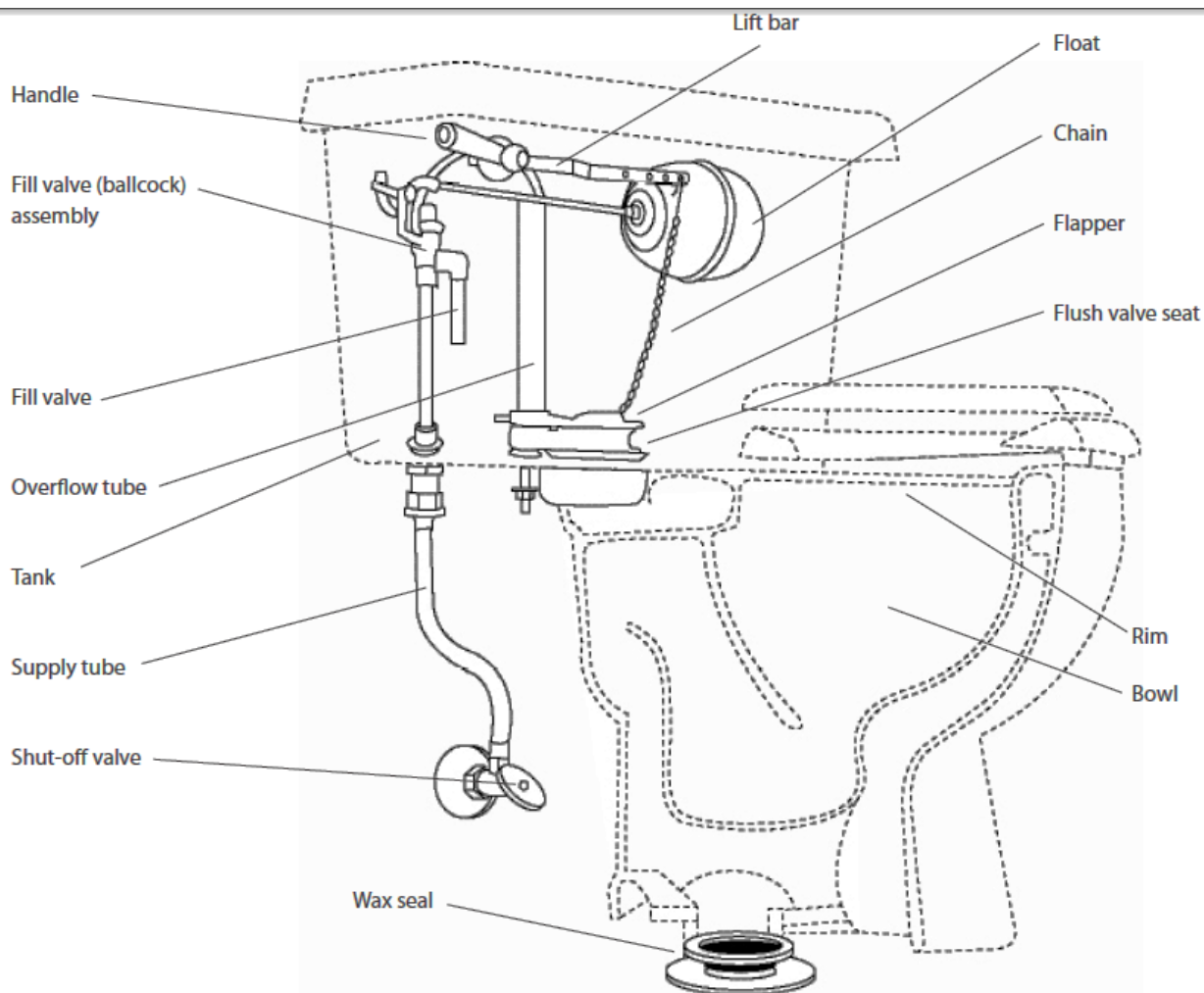
By doing this, you:

- set a clear date that maintenance will visit each apartment for a quick inspection;
 - ensure that each A/C filter is changed on time;
 - provide supervision of the pest control technician, making sure the job is done safely; and
 - correctly retain tighter key control. (The maintenance technician or staff person locks and unlocks the doors).
-

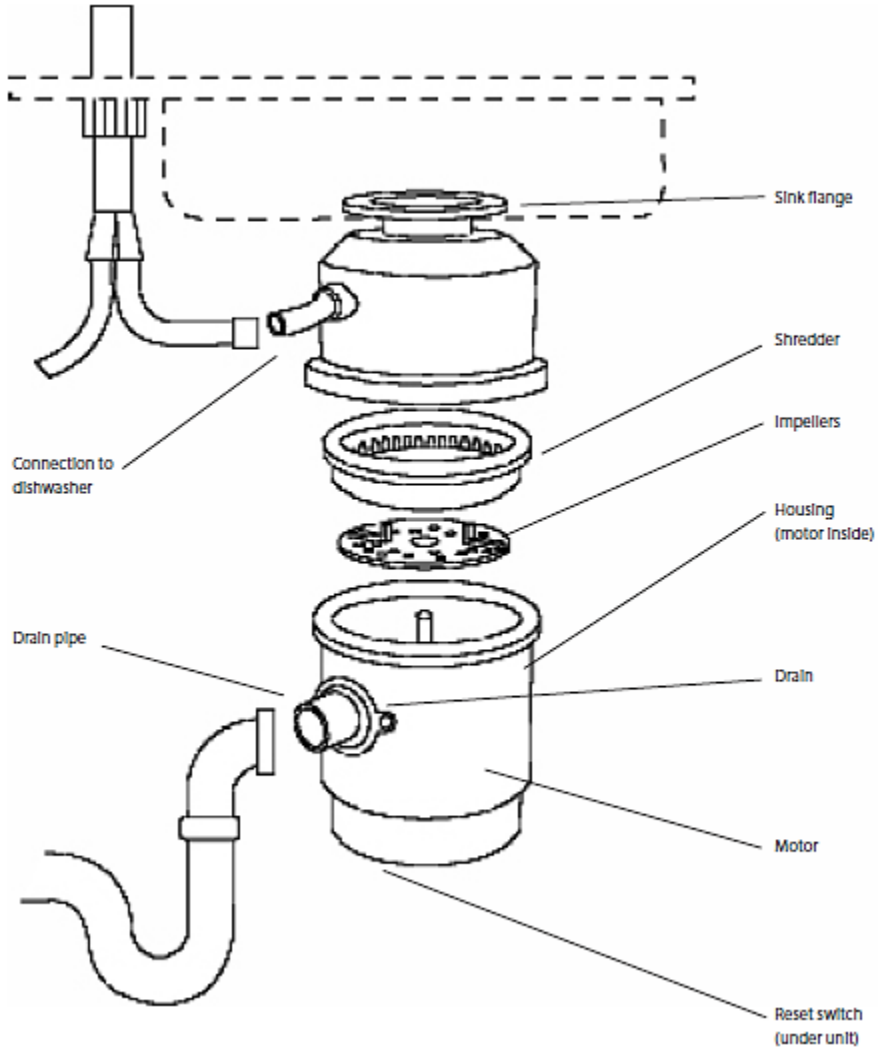
Anatomy of a Toilet



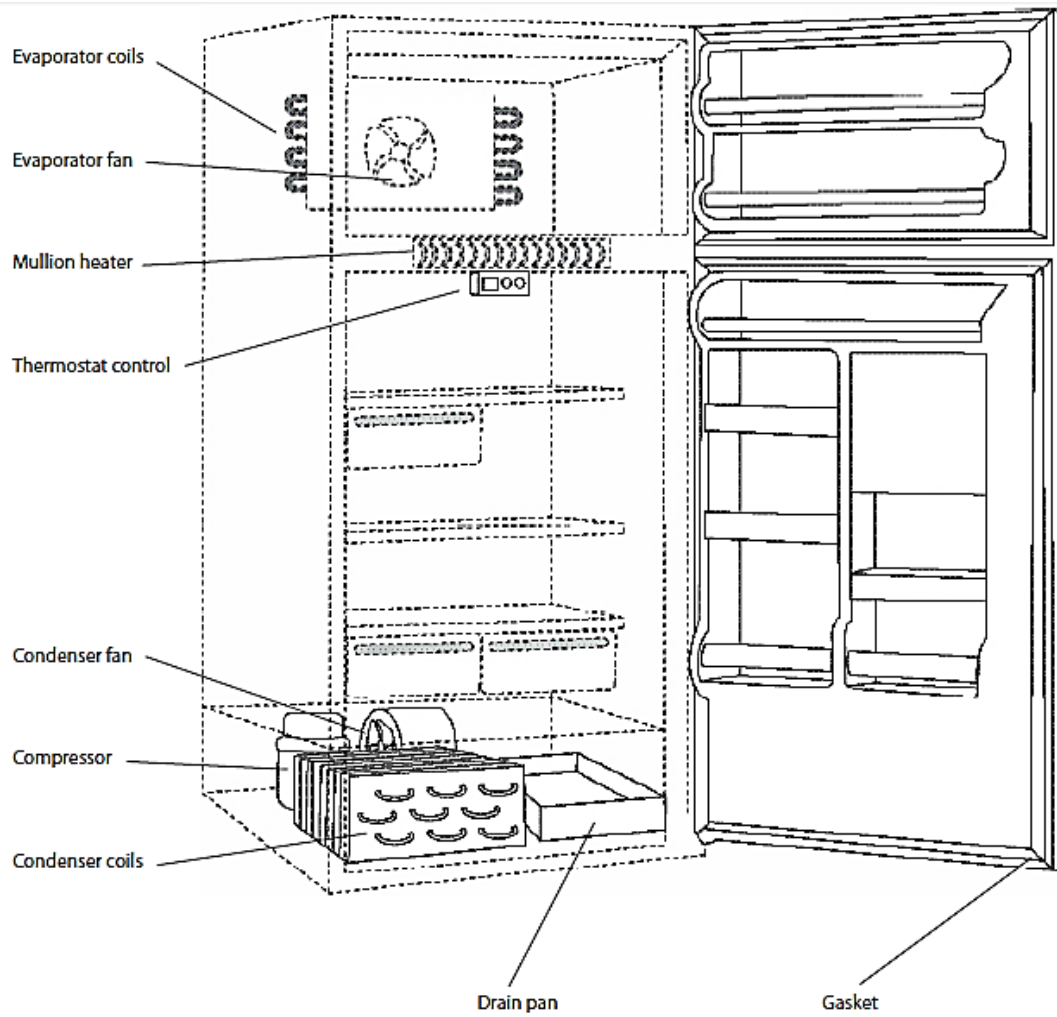
Anatomy of a Toilet



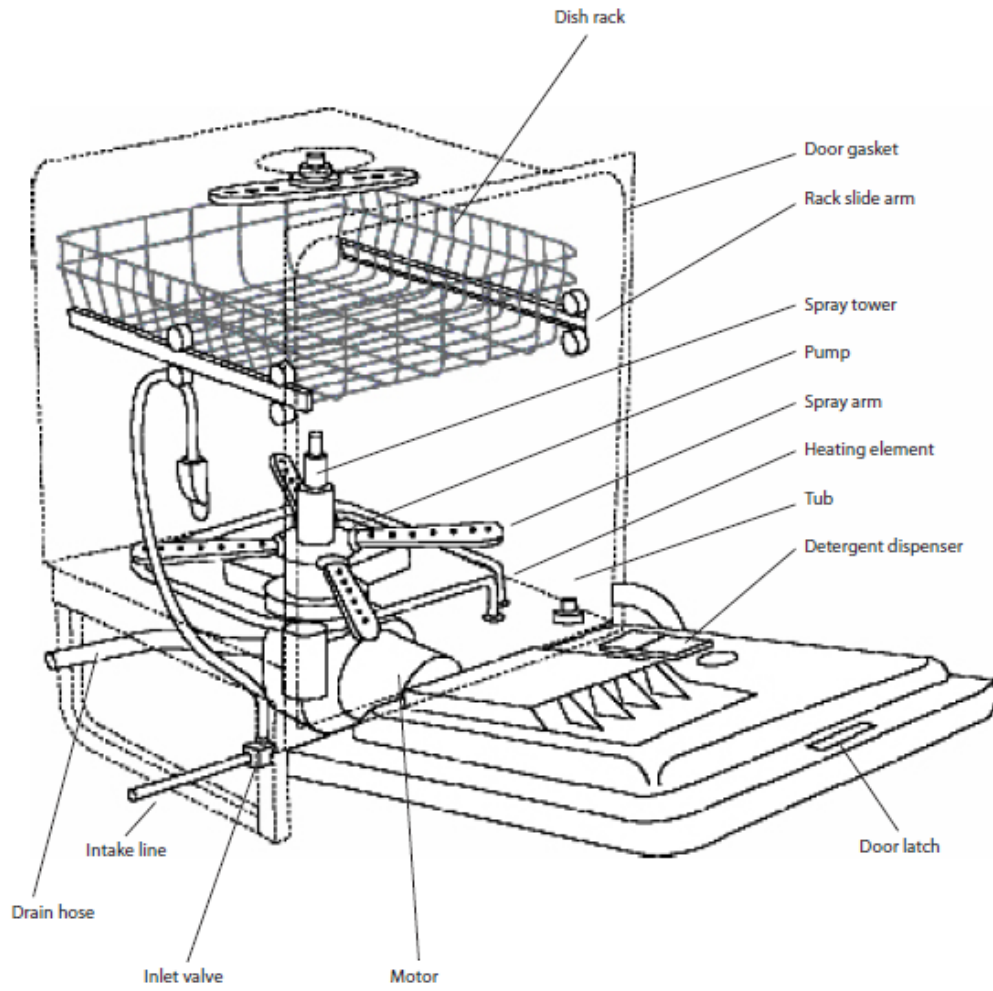
Anatomy of a Garbage Disposal



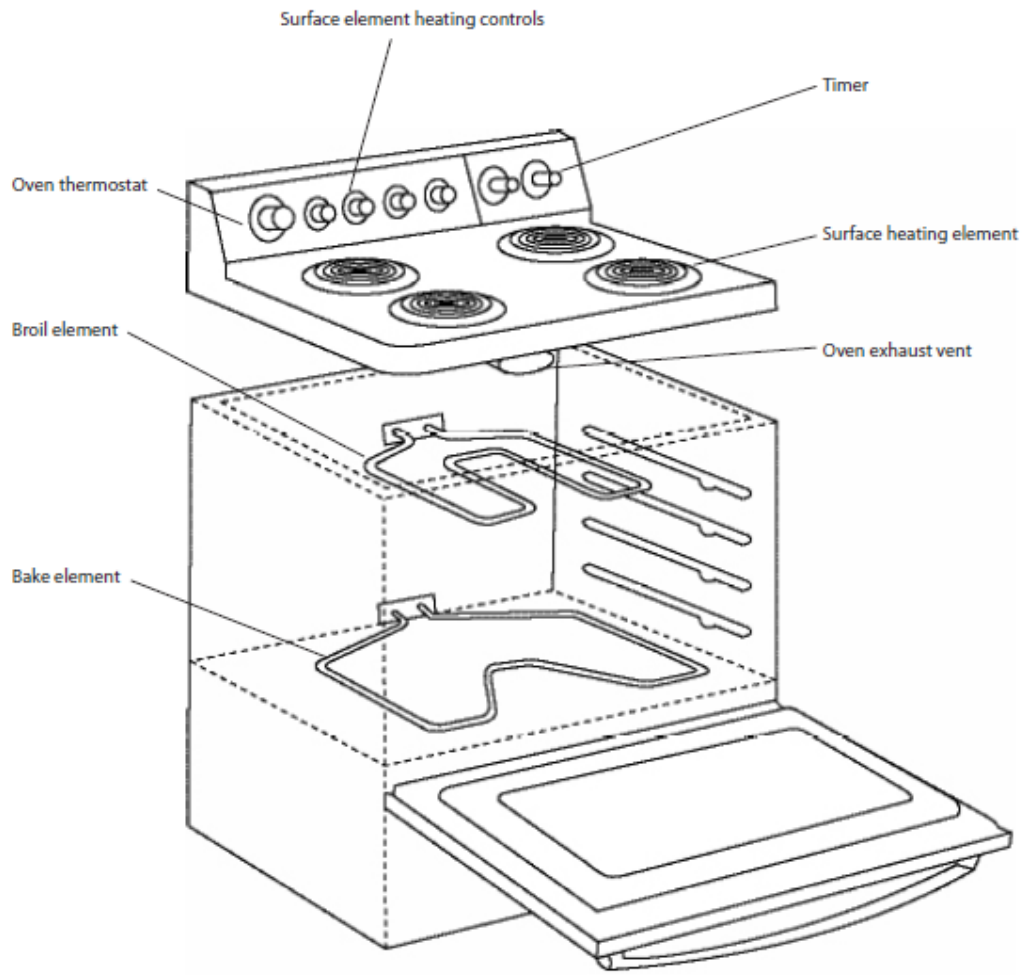
Anatomy of a Refrigerator



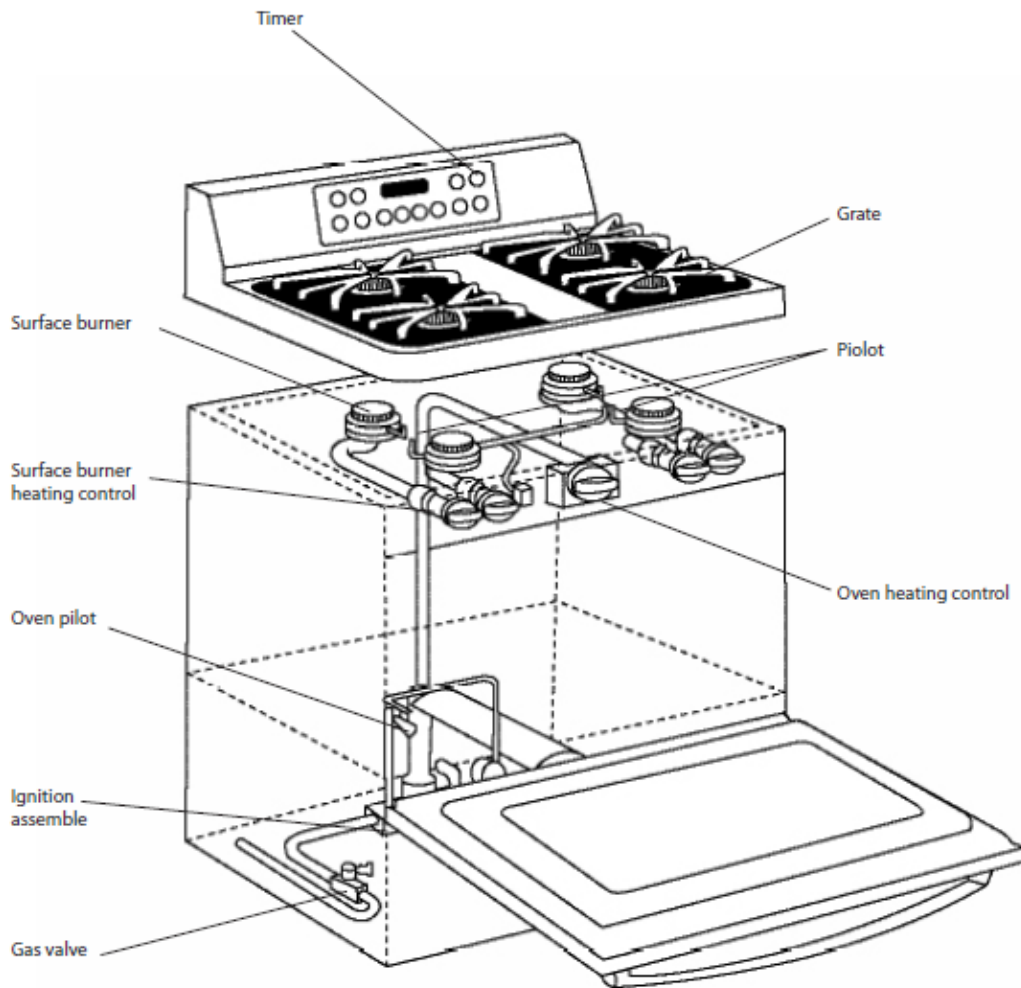
Anatomy of a Dishwasher



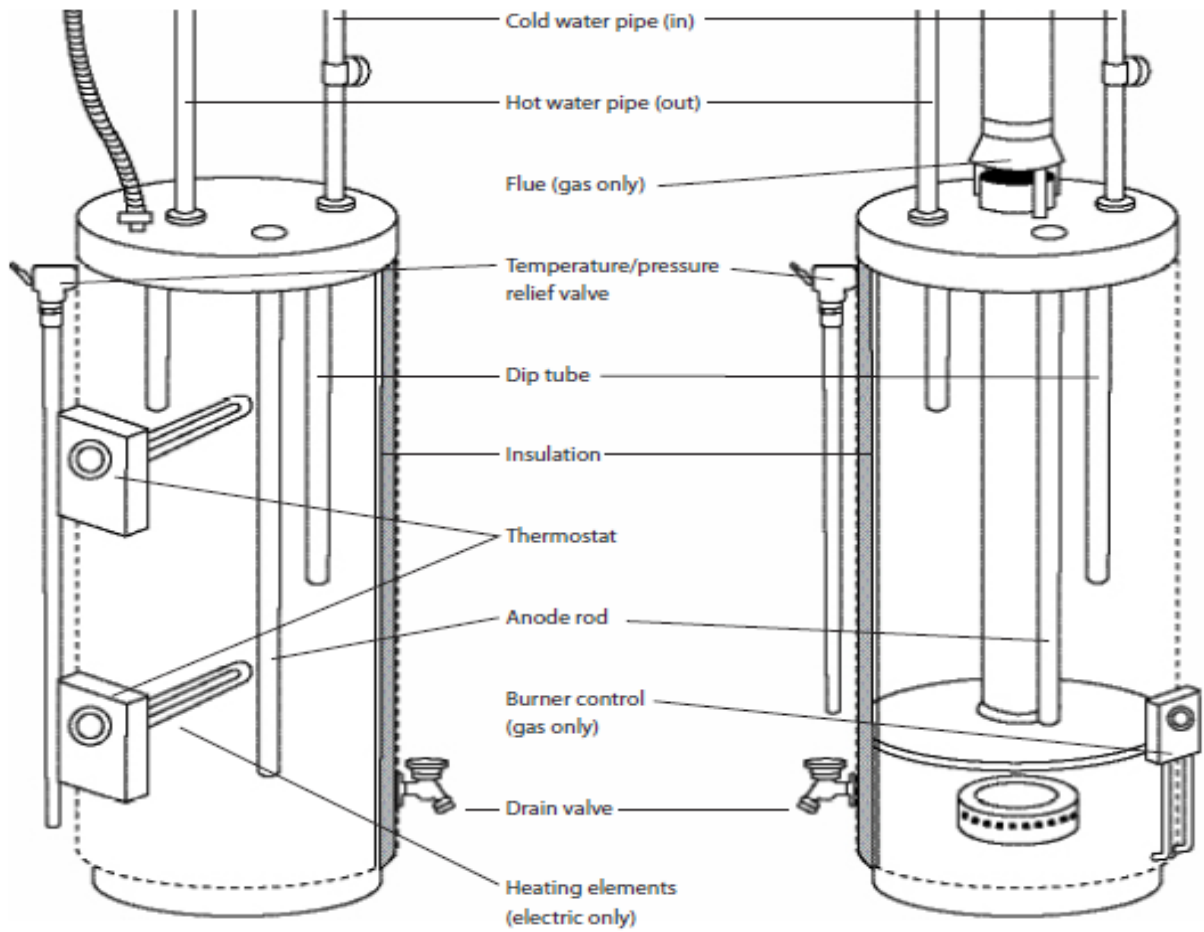
Anatomy of an Electric Range



Anatomy of a Gas Range



Anatomy of Water Heater



Risk Management

Reference Guide



Emergency Plan: Determining Type of Probability

Determine types When establishing an emergency plan determine what types of emergencies are most likely to occur at your property. You can contact your local American Red Cross, Civil Defense or Emergency Management offices for other types of emergencies to consider and to utilize any emergency planning materials they may have.

Determine probability To determine probability, review historical data especially for weather-related emergencies. Rate each emergency on a scale of one to five, with five being very likely to occur.

Emergency Type	Probability Rating (1 is low, 5 is high)				
	1	2	3	4	5
Fire					
Airplane crash					
Building collapse					
Explosion					
Chemical release					
Criminal Activity					
Drought					
Medical					
Power failure					
Water failure					
Electrical storms					
Tomado					
Hurricane					
Earthquake					
Flood					
Snow blizzard					
Terrorist event					
Train/subway accident					
Automobile/vehide accident					
Bio-Hazardous material release					
Elevator failure					
Heating/cooling failure					
Riot/civil disturbance					
Employee injury					
Gas leaks					
Sewer back-ups					
Animal-related emergencies					

Emergency Plan: Determining Type of Probability, Continued

Other factors to consider

Other factors to consider when determining the likelihood of various emergencies include:

- Proximity - Consider the distance to the nearest airport, rail line, interstate highway, subway or industrial facility.
 - Adjacent properties – What are the activities on the property next to yours? What kind of emergencies could that property experience that would affect you?
 - Weather and geography – Is the property in an area that is at risk for flooding, tornadoes, hurricanes, heavy snowstorms or earthquakes?
 - Residents – Are your residents mostly elderly, families or singles? How will your occupants respond to an emergency? Are there language barriers?
 - Property arrangement – How close are the buildings? Are the streets and building entrances easily accessible for larger emergency-response vehicles? Are the buildings high-rises with elevators or single story units?
 - Property infrastructure – Consider the buildings' emergency resistance or containment capabilities, emergency detection systems, security and locking systems and lighting.
-

Emergency Plan: Creating

Goal

Now that you've identified the highest priority emergencies for which you need to be prepared, you can create a plan. To develop a plan, you'll need to establish goals for each emergency.

The overriding goal should be to minimize the emergency's impact to the residents, staff, and business operations.

Other goals to consider are:

- preparing buildings and grounds to provide a reasonable level of safety
 - training staff in the use of available rescue and safety equipment, and
 - encouraging residents to develop their own personal emergency plans
-

What to include

The plan should specify details for:

- Prevention
- Detection
- Communication
- Evacuation
- Containment/Mitigation
- Recovery
- Public Relations

Reference: See also the "Most Common Emergencies" topic later in this chapter for things to include in the emergency plan.

Continued on next page

Emergency Plan: **Creating**, Continued

Prevention

The level of prevention depends on the type of emergency. Preventive measures can be a double-edged sword for onsite managers. If a disaster occurs, there will be questions regarding the lack of preparation, but if a disaster does not occur then preventive measures may seem restrictive or needless.

People

Prevention for the human components of an emergency includes training staff in the proper use of equipment, hazardous materials and tools. Residents should be encouraged to report dangerous conditions.

Property

Building and fire codes exist primarily to prevent the failure of the building either in and of itself or during a natural disaster.

Business

Prevention for business operations includes backing up computer files and storing back-up files of electronic and paper records off site.

Reference: The American Red Cross and the Federal Emergency Management Agency (FEMA) provide flyers and information on emergency planning.

Detection

Early detection can prevent some small incident from becoming a major emergency. Review each emergency to determine:

- whether detection is possible, and if so, how much time should elapse between detection and response, and
- which group of people is most likely to detect the different emergencies, and how this group can be trained for quicker detection

Example: If your community's management office accepts packages for residents, then the receptionist is the first person who could detect a suspicious package if he/she were trained in identifying elements of a suspicious package and how to respond upon identification.

Continued on next page

Emergency Plan: Creating, Continued

Communication

Communication includes:

- notifying the proper authorities and all others who might be impacted by the emergency, and
- maintaining open lines of communication among all impacted parties during and after an emergency.

Forms of Communication

All forms of communication that should be considered when thinking about the options for communication during an emergency, including:

- alarms
- building control panels
- sirens
- radio, and
- television broadcasts

Command Station Establishment

During an emergency, a command station should be established so that activities and the progress of the emergency can be monitored. From the command station, orders for an evacuation, relocation, search or medical response can be issued.

To reduce the amount of confusion, limit communication as it descends the chain of command.

Example: Communications to the residents should be kept simple and made only after a decision or instruction has been confirmed to prevent conflicting information.

Locating Command Station

Considerations for the location of the command station are:

- alternative site for the command station in case the primary location is affected by the emergency.
- accessibility to components such as communication lines, streets, building controls as well as protection from the emergency.

Continued on next page

Emergency Plan: Creating, Continued

Containment/ Suppression

Description

Containment and suppression refer to reducing the threat to people and property.

Containment and suppression efforts can be taken upon detection depending on the type of emergency.

Resident Centered

- Some types of containment efforts residents can perform themselves such as closing doors to prevent the spread of fire.
- Evacuation is also a type of containment.
- While training can decrease the threat of an emergency, no one should ever be encouraged to risk their personal safety when responding to an emergency.

Staff Centered

- Staff members can be held to a higher standard of responsibility than that of residents, but still should not be expected to act heroically.
- Staff members can be required to attend all safety and emergency training programs.

Continued on next page

Emergency Plan: Creating, Continued

Recovery

Once the emergency is over, efforts switch to recovery. Having an organized plan for recovery will help ensure operations return to normal as soon as possible.

Things to Consider

There are several issues to consider when developing your recovery plan:

- Which agencies and offices need to be contacted following each of the various emergencies? Regulatory or governmental agencies and insurance companies may have policies and procedures that will determine the pace of your recovery.
- How will you fill positions of injured or recovering staff members?
- What is the cost of paying employees overtime or hiring temporary workers?
- How will you deal with various types of damage to the buildings and property?
- If some of the residences are no longer habitable, where will the residents live?
- In what circumstances are you responsible for their lodging?
- How will smoke or water damage be cleaned?
- What vendors could provide the types of services needed after different emergencies (make a list)?
- What are the potential effects of losing records, equipment or inventory?
- Can your business operate from an alternate site?

Continued on next page

Emergency Plan: Creating, Continued

Public relations

A public relations plan should be part of your emergency plan because you will want to ensure that there is minimal damage to the community's reputation.

Nature of Response

The best way to ensure favorable media coverage is to respond to every emergency:

- Quickly
- Efficiently
- Compassionately

Spokesperson

Designate one spokesperson to answer all questions. All media inquiries should be directed to this one person who will ensure that only accurate information is released and the information is consistent.

- Prepare all responses so that the answers are in the most positive tone possible.
- Ensure that no one who speaks on behalf of the community responds with "no comment."
- Do not criticize local, state or federal officials for anything.
- Do not speculate or offer personal opinions - share only facts that have been confirmed.
- Thank the people involved in the emergency response.
- Convey compassion and sympathy for affected victims.
- Decide if and when media should talk to other technical experts.
- If the police or fire departments are present, refer the media to their spokespersons.

Response Example: If there were injuries (or worse) then express sympathy and compassion, but do not admit guilt. You do not want to say anything that you may have to recant later, or worse, could subject you to a slander or libel lawsuit.

Evacuation Plan: Implementing

What's involved After the plan is completely developed, it can be implemented. This includes:

- distributing an appropriate version of the plan to all affected parties
 - sponsoring training sessions
 - conducting drills, and
 - acquiring any additional materials and equipment
-

Distributing versions You'll have to consider each party's affiliation to the community and how much of which types of emergencies might impact them, and then prepare the appropriate level material.

For example:

- maintenance supervisor should be fully aware of all the details of the emergency plan.
 - maintenance staff may only need to know parts of the plan
 - residents will need to know even less than the staff
 - vendors who are occasionally onsite may not need to know anything
-

Training sessions Once the plan is developed it will need to be presented to the people it is intended to protect and those who will be involved in the actual emergency.

Staff

Special training may be required for staff that will be required to perform special functions during an emergency. Consider training in:

- operating alarm systems
- operating suppression equipment
- evacuation techniques, and
- first aid and medical response

Community staff should also see the presentation, and be given the strategy behind the activities in the plan.

Residents

Residents should be directed to monitor local news broadcasts for possible evacuation instructions issued by the authorities.

Continued on next page

Evacuation Plan: Implementing, Continued

Emergency drills

Content

The drill should simulate an actual emergency as closely as possible. The drill should ensure that all aspects of the evacuation can be fully executed. Special evacuation procedures should also be practiced during a drill.

Participation/Attendance

Staff must not be permitted to skip the drill. You may want to designate one person who stays behind to answer the phone, but be sure to rotate this task so that everyone participates in at least one drill.

Type and Frequency

There may be local or state regulations governing the type and frequency of drills to be conducted.

Materials and equipment

Upon completion of the plan, you may realize that new equipment or materials need to be added to the community's inventory.

You may want to designate a special location on the property for emergency equipment such as:

- backup generator
 - personal protective equipment (PPE) for various situations such as fire or weather
 - tent for temporary shelter, and
 - first aid equipment
-

Legal Responsibilities

Reference Guide



Department of Housing and Urban Development (HUD)

History

Created as a part of President Lyndon B. Johnson's War on Poverty, the Department of Housing and Urban Development (HUD) was established in 1965. While HUD was established in 1965, its history extends back to the National Housing Act of 1934. HUD is now the largest administrator of government-assisted housing and the main enforcer of federal fair housing laws.

Mission

"HUD's mission is to increase homeownership, support community development and increase access to affordable housing free from discrimination. To fulfill this mission, HUD will embrace high standards of ethics, management and accountability and forge new partnerships—particularly with faith-based and community organizations—that leverage resources and improve HUD's ability to be effective on the community level."

What HUD does

HUD provides a coordinated and comprehensive response to the housing and community development needs of America.

HUD's major programs

The primary programs administered by HUD include:

- mortgage and loan insurance through the Federal Housing Administration;
 - Community Development Block Grants (CDBG) to help communities with economic development, job opportunities and housing rehabilitation;
 - HOME Investment Partnership Act block grants to develop and support affordable housing for low-income residents;
 - rental assistance in the form of Section 8 vouchers for low-income households;
 - public or subsidized housing for low-income individuals and families;
 - homeless assistance provided through local communities and faith-based and other nonprofit organizations; and
 - fair housing public education and enforcement (Office of Fair Housing and Equal Opportunity or FHEO).
-

Department of Housing and Urban Development (HUD), Continued

Income categories

An individual's or family's income plays a role in qualifying for government-funded housing. Under the federal government's definition a family is considered

- low income if their income is below 80% of an area's median income,
- very low income if their income is below 50% of the area's median income and
- extremely low income if their income is below 30% of the area's median income.

Note: 60% of area median income is used as *low income* for the low-income housing tax credit and HOME programs. For example:

I.e., Median Income - \$50,000 family of 4		
80%	\$40,000	Low income
50%	\$25,000	Very low income
30%	\$15,000	Extremely low income
60%	\$30,000	Tax Credit/Home

- Tax credit qualifications are similar to those in subsidized programs; however, tax credit programs have their own requirements and are not considered to be HUD-subsidized. Instead the owner receives tax benefits from the IRS, allowing the owner to charge a lowered rent.

Goals of Federally-Assisted Housing

Housing programs

Congress has created and authorized many federally-assisted multifamily housing programs. These programs are organized into sections. Most of these programs fall into one of three (3) categories:

- public housing programs,
- funding for privately-owned and managed properties, or
- tenant-based subsidies (Section 8 vouchers).

Note that there are other types of subsidized housing programs, such as those funded by states, counties or cities. They often follow requirements similar to some of the federal programs but not always. There are also tax-credit properties that do not receive funding but receive tax advantages. They have their own program requirements.

Public housing programs

More than 7 million families have lived in locally-managed, HUD-supported public housing. Today, HUD helps provide decent, safe and affordable housing to more than 4.3 million low-income families through its public housing, rental subsidy and voucher programs. These properties are government-owned and operated.

Note that residents are allowed up to two animals in public housing, as well as in assisted senior properties, under both federal law and some state laws.

Mortgage insurance and Project-based subsidies

In project-based subsidies, HUD's programs can reduce rents for low-income residents through HUD's mortgage programs and through its direct subsidy programs. The purpose of its insurance programs for single and multifamily housing is to reduce the interest rates for mortgages. A subsidized mortgage reduces the mortgage expense of the property, allowing community managers the increased potential to make a profit in spite of lower rents. Through HUD's direct subsidy program, properties can provide unit-based subsidies permitting residents to pay not more than 30% of their income as rent.

Tenant-based subsidies

An example of a direct subsidy would be the Section 8 Voucher program. In tenant-based subsidies, residents live in privately-owned properties and pay a portion or percentage of their household income for rent and utilities. HUD or its local agent, a public housing authority or state agency enters into a Housing Assistance Payment Agreement (HAP) with the owner and pays the owner the difference between what the resident pays and what HUD considers a "fair" consideration. The tenant qualifies separately for the Voucher with the housing authority.

Section 8 Program

Overview

The Housing and Community Development Act of 1974 amended the United States Housing Act by adding the Section 8 program, which provides a subsidy to bridge the gap between a low-income resident's means and the cost of private housing. Congress wrote the Act to encourage the construction of new housing and to utilize existing housing.

In addition to rent subsidy programs, HUD hosts a variety of project-based subsidies aimed at rehabilitating properties and constructing properties that can house low-income families, the elderly and the handicapped.

Rent subsidy programs

The rent subsidy programs have these characteristics:

- Families receive the benefit of a rental subsidy, known as a housing assistance payment, equal to the difference between their share of the rent and the rent charged by the owner. Adjustments are made if the rent does not include all utilities.
 - Public or private owners receive the housing assistance payments directly from HUD or from a Public Housing Authority (PHA) that administers the program for HUD for a fee.
 - Eligible families are low-income or very low-income families.
 - Owners must maintain units in decent and sanitary conditions.
 - Rents are within the fair market rent (FMR) for the area and size of the rental housing.
-

Section 8 Housing Choice Voucher Program

Under Section 8 of the U.S. Housing Act of 1974, HUD established the Voucher and Certificate Programs. These programs allowed families to select their own units from housing available within the jurisdiction of public housing authority (PHA). While the programs were slightly different in application, in the late 1990's they were combined into what is known today as the Housing Choice Voucher Program.

This program assists very-low income families, the elderly and the handicapped secure decent, safe and sanitary housing in the private market. Participants can find their own housing, including single-family homes, townhouses and apartments. Vouchers are administered locally by the public housing authority (PHA) or state agencies.

Continued on next page

Section 8 Program, Continued

Section 8 Housing Choice Voucher Program, (continued)

An eligible family (or individual) is issued a voucher and is responsible for finding a suitable housing unit that the owner has agreed to rent under the program. Rental units are inspected prior to initial occupancy and annually thereafter to meet minimum standards for health and safety. The subsidy is paid directly to the owner, with the family paying the difference between the voucher amount and market rent. Families must pass regular screening criteria and annual recertification for their share of the income.

There is a formal application and approval process. Long waiting lists are commonplace (from 2 to 10 years), and each PHA establishes its own order of preference for awarding vouchers. For example, a homeless family or family in substandard housing may get preferential position.

The program is flexible to provide for expanding income for the family, moves to different parts of the country and changes in family circumstances. In other words, the voucher/subsidy moves with the family.

Participation in the program by owners is voluntary in many states. As a voucher program owner, owners have a mandate to provide decent, safe and sanitary housing at a reasonable rent. The unit has to pass program standards and remain in compliance so long as rent subsidy payments are received. The HUD lease addendum and PHA contract prevail over the owner's lease.

Note: Tax credit properties MUST accept Section 8 vouchers.

Section 8 Program, Continued

Types of Vouchers

The following table explains the types of vouchers that are available in this program.

Voucher	Use
Conversion	For replacement housing due to demolition, disposition or conversion. It is also used when an owner “opts out” of the HUD program by prepaying a HUD mortgage.
Family Unification	Assistance to families for whom housing expense has caused separation from children or prevented reunifying children with their families.
Homeownership	Assistance to low-income families buying homes.
Project-based	For owners, as incentives to develop, rehab or make available additional housing units.
Tenant-based	For low-income families seeking safe, clean affordable properties.
People with disabilities	For disabled people seeking housing.
Welfare-to-work	Assistance in the transition from welfare to economic self-sufficiency.

Special Section 8/subsidized housing termination requirements

Generally, the owner must be able to demonstrate good cause for the termination since the resident will lose his housing and/or voucher and in some cases may become homeless. An owner’s ability to terminate such tenancies without cause is limited by federal law and by the terms of the HUD-required lease addendum.

Even if the termination is for “cause,” it is always wise to consult with an experienced attorney when terminating a subsidized tenancy.

Additional requirements may apply when an owner chooses to stop participating in a subsidy program.

Management Agents

Types of agents The following table describes the four types of management agents recognized by HUD in its programs.

Type of Agent	Description
Owner/Manager	Also known as “self-management.” The owner and management are the same business organization. The same person who owns the property is also the manager.
Identity-of-Interest (IOI) Manager	The manager has a separate relationship to the owner. The manager also controls 10 percent or more of the voting rights of the owner entity.
Independent Fee Management Agent	The manager has no financial interest in the property. The only interest in the property is earning a fee for management services.
Project Administrator	Reports are made to a Board of Directors. The Project Administrator directs the day-to-day activities of the property (usually designed for elderly, handicapped or disabled residents). The manager receives a salary rather than a management fee.

How HUD monitors management If the management’s operating procedures do not meet with HUD’s approval, HUD will recommend specific improvements. However, HUD usually abstains from involvement in the daily operations of its properties unless there is a complaint.

Management Agents, Continued

Types of HUD reviews

HUD conducts the following three (3) types of reviews.

HUD conducts this type of review...	To...
Physical inspections	confirm that properties are in decent, safe and sanitary condition.
Management reviews or onsite visits	review occupancy practices, marketing, resident inquiries and record keeping.
Financial reviews	confirm that project funds are being handled properly by reviewing financial statements.

Tenant Selection Plans and Affirmative Fair Housing Marketing Plans are required and are commonly reviewed.

Potential consequences of failure to comply

HUD uses the following three (3) basic sanctions to discipline violators.

- Remove the manager for failing to
 - o maintain the physical condition of the property,
 - o follow proper management practices,
 - o keep proper records and reports, or
 - o observe fair housing and equal opportunity requirements.
- Impose civil penalties, such as monetary penalties, for various violations, with possible referral to the Department of Justice for civil action, and for tax-credit properties, loss of tax-credit benefits.
- Impose criminal penalties, such as fines and imprisonment, for making false statements and misusing funds.

Tax credit properties can also lose their tax status if found guilty of fair housing discrimination.

Creating a Positive Fair Housing Environment

Risk of complaints

Many fair housing complaints occur because a seemingly innocent action or remark on the part of the onsite staff is perceived as discriminatory. Community managers need to create an environment where complaints are less likely to occur because an emphasis on fair housing is present throughout the property operations.

Fair Housing poster

The placement of the federal Fair Housing poster in a clearly visible location within the rental office is a requirement for all properties of four units or more. The required size is 11 inches by 14 inches.

Creating a positive fair housing environment (Equal Housing Opportunity)

Encourage an aware and welcoming environment by following these guidelines.

- Display the symbols of fair housing, the “Fair Housing” poster, the Equal Opportunity Housing symbol and accessibility symbols on signs, placards and any other marketing or printed material. These actions remind the entire staff, as well as applicants and residents, that the community is sensitive to fair housing concerns.
 - Provide accessible parking places for applicants visiting the property as required by the ADA.
 - Document everything.
 - Establish a routine of documenting all visits, calls and emails from prospects or residents.
 - Use a log to document telephone calls and visits. Note the date, time and specific information about the reason for the contact as well as who took the notes.
 - Be especially alert to traffic logs and guest cards, work orders, applications, leases and other lease documents and use of incentive programs.
 - Document any deviations from established policy (who, when, what and why).
 - Keep all documents a minimum of three, and preferably four, years.
 - Document the selection criteria used to approve applicants. Make copies available to all applicants. Make sure all selection decisions are in line with the written criteria.
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Creating a Positive Fair Housing Environment, Continued

Creating a positive fair housing environment (continued)

- Treat all residents, applicants and staff equally, fairly, courteously and professionally.
 - Do not permit insensitive or offensive jokes, pictures or slogans to be used anywhere on a rental property, by anyone, including staff, contractors or applicants.
 - Do not have anything with symbolic meaning that might indicate a preference or limitation in the rental office.
 - Have a policy that you won't tolerate any type of discriminatory behavior by residents, whether toward other residents, onsite staff or vendors. Check with fair housing-knowledgeable counsel if the activity is occurring between residents.
-

Complying with the Law

Overview

No person, policy or procedure can guarantee that a property will never be sued under the fair housing laws. Understanding and implementing the following practices can help minimize risk and potential liability. The best policies and procedures don't help if they aren't being implemented by all staff members every day.

Compliance guidelines

Compliance and prevention are two aspects of fair housing that each property manager must address. Follow these guidelines to monitor your property's operations for compliance with the fair housing laws.

- Determine if the property receives federal funding and, if so, what the requirements are.
 - Identify state and local fair housing laws that apply to the property.
 - Review existing community and operating policies.
 - Perform a familial status review of rules and policies.
 - Develop improved policies and procedures and have them reviewed by fair housing-knowledgeable counsel before implementing.
 - Provide new or revised policies to staff and/or residents.
 - Identify known problems, if any, concerning fair housing requirements.
 - Determine whether any facility, other than the rental office, is covered by the ADA.
 - Perform an accessibility review on the property.
 - Meet with accessibility experts for advice on needed changes.
 - Make needed modifications to property.
 - Send management staff to annual fair housing training.
 - Administer follow-up quiz and reinforce fair housing policies with staff.
-

Cutting Edge Issues

Cutting edge issues

A prudent manager will stay informed of the new cutting edge issues affecting rental housing today. The following are some of the developing fair housing issues:

- Linguistic profiling is discrimination that can occur based on how a prospect or resident sounds (accents, slurs or difficult to understand). If a manager makes a decision based on the sound of someone's voice, it would be discriminatory. Linguistic profiling has been and will continue to be tested around the country.
- Visitability, already a localized requirement in some areas, describes new construction that must accommodate people with disabilities who visit able-bodied residents.
- Victims of domestic violence have been protected under certain circumstances based on the protected class of sex. Where families are commonly evicted in the case of domestic violence, it appears that the victims, generally female, may be protected since the policy has a disparate impact on women.
 - The VAWA (Violence Against Women Act) already provides federal protections for women in public housing and other subsidized programs.
 - Many states already have domestic violence statutes of their own. Be sure to learn about those laws when faced with a domestic violence situation on your property to avoid any legal missteps.
- Immigration issues and Homeland Security policies that may target protected classes, such as national origin or religion, are ongoing concerns of enforcement agencies and fair housing advocacy groups throughout the country.

Continued on next page

Cutting Edge Issues, Continued

Cutting edge issues (continued)

- Use of medical marijuana in states where it is legal is in conflict with federal drug laws. There is continued conflict between these laws and continued confusion between state and federal directives. This can impact housing providers in those states because while it is illegal under federal law to grow, use or distribute medical marijuana, state law may require that their state enforcing agencies investigate claims of discrimination based on disability accommodations.

Check with your attorney if you have a resident claiming they have a right to use medical marijuana as an accommodation for disability.

- Name profiling is discrimination based on a person's name, such as first names that are common to African Americans or Middle Eastern names, and then basing rental decisions on those names. As more people immigrate to the U.S., name-profiling is likely to increase.
 - Second-hand smoke and smoking in rental property is a growing issue throughout the country. Many cities have enacted ordinances prohibiting smoking in certain areas of a multi-family property. To avoid the problem entirely, many properties have gone "smoke-free." Expect more legislation at both the local and state level throughout the country in the future.
-

Leasing Practices

Handling inquiries and site visits

Some of the best practices to reduce the risk of discrimination are to

- Keep a record of the date and time of all phone calls and visitors with a brief description of the conversations and the name of the note taker. This is useful in harassment situations.
- Use a standard welcoming greeting for both telephone and in-person visits. Be enthusiastic with everyone.
- Establish a policy for timing and format of responses to all electronic leasing inquiries.
- Establish a policy for returning all phone messages or voice mail.
- Use the same procedures for all phases of the selling process, from greeting to qualifying. Document any necessary deviations.
- Instruct staff not to answer questions regarding the demographic make-up of the residents and how to politely decline to discuss the issue. Even if a person of the same protected class asks about people like themselves, the question should not be answered other than with a polite refusal. We suggest that you answer the question by indicating that fair housing laws prohibit the tracking or keeping of such information. Further state that all residents who meet the property's rental criteria are welcome.
- Ensure the leasing area and tour routes are clear of any impediments and accessible to disabled applicants.
- Provide all applicants with an equal quality tour. Document any necessary deviations.

Keeping records of available units

- Ensure each staff member has an up-to-the-minute leasing availability record. Update the information throughout the day as units become leased or notices to vacate are given.
- Document when the make-ready process is completed and a unit becomes available for showing and leasing.
- Train staff in the proper recording of comments about the units on the availability list. For example, do not use descriptions such as "quiet," "active adults only," "executive property" or "private community."

Leasing Practices, Continued

Making offers

Follow these tips when making offers:

- Do not direct certain prospects to certain apartments, for example, to a unit that is near the playground for a family, a ground floor unit for a mobility-impaired prospect or a unit with security system for a single female. This is friendly but discriminatory “steering.”
 - Make the same housing offer to every applicant for the same unit.
 - Negotiating the rental price with residents is a risky practice. Everyone should be offered the same rent for the same unit. Before undertaking a practice of negotiating rental prices, seek the advice of a fair housing-knowledgeable attorney.
 - When rent specials are in effect, clearly document the beginning and end of the campaign. Be sure that every prospect is offered the special, even if they are not aware of it.
 - Beware of offering “discounts” to applicants. For example, preferred employee programs, which give preference to employed applicants, should only be offered in states which do not protect “source of income.” Senior discounts show both a preference based on age in some states and a limitation based on familial status, and has been litigated in past years.
 - Provide an application to every applicant 18 years of age or older (and minors who are emancipated by court order, active duty in the military or by marriage).
 - Do not attach a photocopy of the applicant’s photo-ID to the application. You may request a photocopy AFTER the applicant has been approved as a resident.
-

Screening applicants

- Ensure that the application process is neutral and does not discriminate against an applicant’s membership in a protected class. It should also be consistent for every applicant. This guarantees that every application is reviewed against the same criteria and receives equal consideration.
- Reference: See the topic “Applicant Screening” in the *Management of Residential Issues* module for additional information on screening applicants.
- Do not use information that is acquired informally in the screening process. The use of any information not obtained through the normal screening process leaves the property open to fair housing complaints.

Continued on next page

Leasing Practices, Continued

Screening applicants, (continued)

Disqualification for residency based on criminal background could be considered to have “disparate impact” on some protected classes unless it relates to the prospective resident’s ability to meet tenancy obligations.

Example: Crimes that occurred a very long time ago, or that are of certain types (illegal gambling, bigamy), may not relate to the ability to perform the obligations of tenancy.

Megan’s Law

In most states, property owners are not required to rent to persons who are registered sex offenders. However, in California, owners can be heavily fined for denying housing to persons on the offender’s list, which is an important difference for national companies to be aware of when developing rental criteria.

Registered sex offenders are not allowed in any HUD-subsidized, project-based housing.

Providing agreements or contracts in foreign languages

In project-based, subsidized housing, the mandatory federal Limited English Proficiency or LEP program requires that leases and other documents be provided in a variety of languages for applicants and residents. HUD has a number of these forms available on their Web site for downloading.

Resident Practices

The relationship between you and your residents
(management to resident)

Do the following to minimize fair housing issues that may arise between management and residents.

- Let disabled prospects and residents identify their needs. Do not presume or attempt to accommodate out of good intentions.
- Never threaten or intimidate or otherwise pressure a resident because the resident's visitors or associates are from protected classes.
- Always treat applicants and residents with respect. Make each one feel valued and proud of their apartment homes.
- Policies for common area amenities should not discriminate against protected classes but should use fair rules for conduct, sanitation and safe operation.
- Consider the manufacturer's recommendations for use of fitness or other equipment if establishing rules for use of the fitness center and/or other common area amenities.
- Do not ban children from, or set unreasonable restrictions for, the use of recreational amenities. Require adult supervision only where appropriate based on legitimate and verifiable health and safety reasons.
- Handle all complaints promptly, including harassment and sexual harassment.
- Provide equal service to all residents. This includes having a written procedure for handling maintenance requests in a timely manner.
- Follow that old management warning: be friendly, but never a friend, to your residents.

Continued on next page

Resident Practices, Continued

**The relationship
between your
residents**
(resident to
resident)

Do the following to minimize fair housing issues that may arise from resident-to-resident relations.

- Don't automatically assume the issue is just a personality problem and ignore it.
- Don't automatically evict both parties in the dispute.
- Be cautious about taking eviction action based on behavior if a female resident could be a victim of abuse or harassment by a spouse or live-in. Such situations have been held to be sex discrimination by the housing provider against the female victim and should be considered on a case-by-case basis. Obtain legal advice before proceeding.
- Set a policy for responding consistently to resident complaints of other residents who are harassing him/her because of the resident's protected category. List the steps that should be taken in the procedure.
- Get the complaint in writing or document a witness' statement or write a confirming letter to the witness if necessary.
- Investigate the situation. If in doubt as to what to do, check with fair housing-knowledgeable counsel as to whether investigation is appropriate and how to proceed in the particular situation
- Consult fair housing-knowledgeable legal counsel for proper response to findings.
- Respond to the accused resident. Provide a warning if the findings support the claim that harassment occurred.
- Respond to the complaining resident by asking what they want done as a result. Do not promise compliance with the request.
- Document and follow up with all parties regarding the findings.

Be prepared to evict the abusive resident if the evidence shows that harassment occurred.

Testing of Leasing Practices

Overview

“Shoppers” are used broadly in the industry by companies seeking to “test” the leasing performance of the onsite staff. The shopping service’s “test” may include testing of some fair housing practices. Frequently, such shopping is used to evaluate just-completed training or as part of a performance appraisal.

“Testing” is similar to shopping except it is conducted to compare the information and treatment provided to testers who pose as applicants strictly for fair housing purposes. It is carried out, in most cases, as a result of a complaint being filed. Two testers of different races or other protected classes, depending on the complaint, may be used to determine whether the staff treats a person from that protected class less favorably in the leasing process.

Testers

Testers are trained individuals who pose as applicants to collect evidence of discrimination, usually after a fair housing complaint has been filed. They have no intention of renting an apartment or purchasing a home. Fair housing and tenant advocacy organizations train and use testers to determine if the owner or community manager is engaging in discriminatory behavior.

Testers and fair housing groups have the legal right to file a fair housing discrimination complaint on their own.

When testing can happen

Testing can be conducted at any time.

There are two types of testing: 1) testing in response to a complaint and 2) testing as part of an “audit” or “survey” to determine the level of discrimination against a particular protected class in a given community or city at a given time.

Who conducts testing

Testing is usually conducted by local private fair housing advocacy agencies. In a proactive style, testing may be ordered by the management or owners if discrimination is suspected. Consult with fair housing-knowledgeable counsel before hiring testers to minimize the risk of a test backfiring on you. The practice can be risky since the results may be discoverable in a fair housing complaint.

Testing of Leasing Practices, Continued

Funding for testing

HUD and occasionally the DOJ provide grants to fair housing advocacy groups across the country under HUD's Fair Housing Initiatives Program. The money is used to investigate cases of housing discrimination through undercover investigations, including testing.

The testing scenario

Testing occurs when two individuals simulate a housing transaction with the intent of gathering evidence of discriminatory housing practices. The two individuals will have similar profiles and housing needs, but only one will belong to a protected class. Both testing parties contact the same rental provider and complete a questionnaire after the contact. It is then reviewed by a third party (debriefed) to determine whether they were treated equally.

Testers are not permitted to ask discriminatory questions or become involved in a discriminatory discussion on the property. The purpose of the test is to obtain objective evidence that will hold up in court.

Characteristics of a test

Below are some of the characteristics of a test.

- Contact may be made via the telephone, personal visit, electronically or all three.
- Calls or visits can occur as soon as within a half hour of each other, depending on the circumstances of the particular community or the particular test being conducted.
- Testing is legally recognized as evidence of discriminatory practices.
- Testing is usually the result of a complaint being filed. If the complaint was filed with a fair housing agency, evidence from the testing may lead to a complaint filed against the property with HUD or in some cases, with the Department of Justice.
- Testing can be used to evaluate fair housing compliance in telephone presentations using testers with ethnic names, accents or of different races or national origins. The test is for linguistic profiling, a relatively new focus.
- Testing can also be used to evaluate fair housing compliance with regard to response to electronic inquiries as well as responses to phone messages.

Note: Some private civil rights groups have been known to use audio and videotapes and photographs to determine if a landlord or property manager discriminates.

Fair Housing Complaints

Overview

Both federal and many state fair housing laws have established procedures for handling complaints as well as statutes of limitation. This process usually begins with the filing of a complaint with HUD, a state administrative agency or a private fair housing organization.

Administrative and non-administrative enforcement of fair housing laws

Federal:

Administrative enforcement of federal fair housing laws is the responsibility of the Office of Fair Housing and Equal Opportunity (FHEO), a subdivision of HUD.

The U.S. Department of Justice (DOJ) also has authority to enforce federal law and can bring “pattern or practice” lawsuits against companies if it believes that a violation is ongoing rather than a “one-time” discriminatory incident.

Substantially Equivalent State/Local Agencies

Organizations which have met the “substantial equivalency” requirements may intake, investigate and resolve fair housing complaints. This is only where state fair housing laws are equivalent to the federal laws. They also handle complaints that occur in their state or local area that are referred to them by HUD.

Fair housing agencies:

Throughout the country, private agencies also take complaints and provide testing in fair housing situations. They are not part of the administrative process; however, they often refer cases to either HUD or state agency when it appears that there is a reasonable belief that discrimination has occurred. For the most part, these agencies provide fair housing education and mediation services.

Private attorneys:

Private attorneys also handle many fair housing complaints through the state or federal court system. In many cases, they take the cases on a contingency basis since many complainants have few financial resources.

Timeliness of complaints (statute of limitations)

Complaints filed with HUD must be filed within one (1) year after the occurrence of the alleged discriminatory act or practice. Complaints filed in state or federal court must be made within two (2) years of the occurrence, not counting any time that the administrative agency has been processing the complaint. This means that a complaint could be filed in court as long as three years after the alleged event took place.

Fair Housing Complaints, Continued

Who are the parties to a complaint

The following individuals or groups are named as parties to a complaint:

- **Aggrieved person**—An aggrieved person includes any individual or entity who claims to be, or believes that they have been, injured by a discriminatory housing practice. To file a complaint, information must be provided to establish that the claim is jurisdictional, meaning that a marital status complaint, for example, falls under a particular state law, not federal law. Additionally, a nexus or relationship must be demonstrated between the alleged injury and the protected status. Most complaints filed with an administrative agency are by in-place residents based on evictions, harassment, denial of accommodations or modifications, for example. Persons seeking an apartment who allege discrimination make up a much smaller share of the complaints filed.
 - **Complainant**—The person(s) or entity filing a fair housing complaint is called the Complainant. A complainant can be an aggrieved person, fair housing group or governmental agency. Complainants and aggrieved parties can include residents, applicants, guests, testers, fair housing agencies or employees.
 - **Respondent**—The entity or entities named as causing the alleged injury is called the Respondent. A Respondent can be any person having ownership, a lessor, sub-lessor, assignee, managing agent, salesperson or real estate broker. Essentially, anyone employed on the property or involved in the company could be named.
-

Reasons that complaints are not filed

Enforcement agencies have found that individuals who have been discriminated against may decide not to file a complaint because of

- a fear of reprisals (a reprisal itself is a violation),
- a lack of reaction due to previous incidents of discrimination,
- a lack of knowledge about how to proceed, and/or
- a lack of knowledge that help is free.

Further, the person who believes he or she has been discriminated against may fear that the complaint process will be too emotional or painful for him or her to pursue.

Note: A HUD Study showed that 40% of those who feel they have been discriminated against did not file a complaint because they felt nothing would change because of it.

Federal Administrative Complaint Process

The federal administrative complaint process (HUD)

A complaint with HUD can be filed

- by phone,
- online,
- by fax,
- by mail,
- or by iphone app.

Note: The majority of housing complaints filed with HUD will be referred to state enforcing agencies for investigation and determination. HUD retains final control over the complaint but usually concurs with the state's findings. When this happens, the first letter you would receive comes from HUD. Shortly thereafter, you will receive a letter from the state enforcing agency.

Continued on next page

Federal Administrative Complaint Process, Continued

The federal administrative complaint process (HUD)
(continued)

The following explains the federal complaint process when it is filed with HUD.

Notification to Respondent

HUD tells the respondent of the complaint and asks them to submit an answer to the complaint.

Investigation

The complaint will then be investigated to determine whether there is reasonable cause to believe the violation occurred. The investigation includes interviewing witnesses, reviewing documents and collecting data. At the end of the investigation, HUD will either make a determination of “no cause” and dismiss the complaint or “charge” the respondent with discrimination.

Notification to Complainant

HUD must complete the investigation within 100 days unless it is impracticable to do so. When the 100-day time-frame is logistically impossible to meet, HUD must notify all parties in writing as to what the estimated period for the investigation will be.

Conciliation

If HUD has reasonable cause to believe that a violation occurred, HUD issues a formal charge of discrimination and brings the complaint before an Administrative Law Judge (ALJ) on behalf of the complainant. The complainant may intervene and be represented by his or her own attorney. HUD will try to reach an agreement with the respondent that protects both the aggrieved person and public interest.

Administrative Hearing

If HUD finds reasonable cause to believe discrimination occurred but is unable to negotiate a conciliation agreement, it will hold an administrative hearing within 120 days unless the complainant or the respondent want the case to be heard in Federal court. Either can choose this option.

Federal Administrative Complaint Process, Continued

The federal administrative complaint process (HUD)
(continued)

Action

If the respondent signs the agreement, HUD will take no further action. If the respondent breaks this agreement and HUD has reasonable cause to believe that this has occurred, they will recommend that the Department of Justice file suit.

Referral

If HUD determines that a state or local agency has the same fair housing powers as HUD (meaning it meets the substantial equivalency requirements), it may refer the case to that agency for investigation (as it does in many states). If the local agency does not begin work on the complaint within 30 days, HUD may take the case back.

Federal Administrative Complaint Process, Continued

Possible penalties in the federal administrative process

If the Administrative Law Judge (ALJ) decides that discrimination occurred, the respondent can be ordered to do any or all of the following:

- Compensate the complainant for actual damages, including humiliation, pain and suffering.
- Be subjected to injunctive or other equitable relief; for example, to make the housing available to the complainant.
- Pay the Federal Government a civil penalty to vindicate the public interest. (The maximum penalties are up to \$16,000 for a first violation, \$37,500 for a second violation within a five year period and \$65,000 for more than two violations within the preceding seven years. These amounts are subject to frequent increase by the government.)
- Pay reasonable attorney's fees and costs.
- Turn over management of the property to professional property management and stay away from the property (common in sexual harassment cases).

Legal Obligation Basics

Manager's responsibility

You are not a lawyer, but your job requires a working knowledge of certain legal obligations surrounding rental housing. Rather than ask you to memorize cases, statutes and regulations as lawyers must, let's discuss how we can become legally obligated.

Private agreements or contracts

A contract is an agreement with specific terms between two or more persons or entities in which there is a promise to do something in return for a valuable benefit known as consideration. These agreements are called contracts. Contracts are promises that are enforceable by law.

Common Law

The courts in the United States are influenced by Common Law, which began in England in the Middle Ages. Even today, our Supreme Court decisions may cite some ancient ruling in support of a judicial opinion. It is that tradition when joined with respect for prior similar decisions, (called legal precedent) that creates the Common Law.

Common Law is the historical treatment of legal issues by the courts

Government

The United States Government, state governments, as well as municipalities, counties, and townships all have the ability to enact laws and regulations which require compliance. Statutes are more important than private agreements or the Common Law on the theory that statutes represent the reasoned decisions of our elected representatives. Therefore, a private agreement that violates a statute will not be enforced (e.g., a lease that violates state landlord tenant law).

This is why it is important to be aware of the laws in the jurisdictions where apartment communities are located.

Unenforceable agreements

An agreement made with minors (unless legally emancipated) or incapacitated persons are not legally enforceable.

Example: You rent a unit to a 17 year old with false identification.

Negligence

Overview No legislature can pass enough laws to govern every aspect of human behavior. The courts have used Common Law principles in the absence of statutes. One of the most important of these principles is negligence.

Definition Negligence is defined as an unreasonable response to a foreseeable risk.

Liability determination Questions likely to be asked include was the danger foreseeable and was the response reasonable?

Premises liability As part of their obligation to provide suitable housing, managers assume the duty to maintain a habitable environment. This is different from a guarantee of a safe environment.

Resident injuries on the premises Management may be liable if the injury was a result of management negligence or conduct that was unreasonably careless. The important question is never “Can I be sued?” The important question is “What is my exposure?”

A personal injury claim could be filed under any one of the following circumstances.

- You were legally responsible for the “control area” and failed to repair the “system” or problem that caused the injury.
 - An accident was foreseeable.
 - The chances of an accident could have been sharply reduced with reasonable attention to the repair problem.
 - It’s probable that a serious injury could result because of your lack of reasonable attention.
 - Your lack of response to the proper maintenance was the cause of the injury.
-

Continued on next page

Negligence, Continued

Mitigation of manager's liability

The manager's liability may be mitigated under the following circumstances.

- The injury was the result of the resident's carelessness. For example,
 - the resident disregarded posted warnings, was drunk, never reported the problem in a timely fashion, etc.
 - The injury occurred but was not the direct result of failed maintenance.
 - The manager was honestly unaware of the particular needed repair.
 - You have a proven track record in seeing to the timely maintenance needs of the facility.
 - The repair was scheduled, but given circumstances beyond your control, you were unable to perform the necessary repairs.
-

Nuisance

Another dimension of habitability is the need for managers to respond appropriately to the potential for danger to residents. The following are recommendations for preventing potential danger to residents and reducing potential liability for injury claims.

- Know the frequency and nature of crime in your particular neighborhood.
 - Consult with the local police department to see if it has someone who will visit your property and show how physical security can be improved.
 - Participate in the Crime Free Multi-Housing Program or any similar program offered by the local police.
 - Know and observe city and state laws regarding precautions such as:
 - Installation of dead-bolt and keyless locks
 - Lighting requirements
 - Procedures for entry of non-residents
 - Landscaping design and upkeep
 - Hiring of a doorkeeper, and
 - Parking lot surveillance
-

Continued on next page

Negligence, Continued

Nuisance, (continued)

- Keep your residents reasonably informed of current criminal activity in your neighborhood. Crime in the neighborhood and on site should be identified in an alert letter to each resident. Company policy will provide guidance and should describe at what point such a letter should be written, what it should say and how it should be distributed. Managers who understated criminal activity to prospective residents have been found liable if residents are injured by criminal activity.
- Encourage residents to understand their personal responsibility for their own safety and to inform the manager of dangerous situations around the community.
- Carefully screen applicants prior to move in, and confront illegal activity quickly by calling local law enforcement.
- Conduct regular property inspections to ensure that there are no settings or circumstances (broken lighting) that might compromise resident safety.
- Cooperate with law enforcement officials and encourage residents to do the same.
- Develop a responsive strategy to the concerns and complaints pertinent to safety issues.

What happens if a resident is a victim of a criminal act

If a resident is the victim of a criminal act on your premises, a lawsuit could be brought against you. Nonetheless, it is practical and reasonable for the manager to offer support, express regret at the occurrence and offer assistance without invoking the potential for increased liability. A manager can be caring without becoming responsible for the incident. Company policies must always be carefully followed in these circumstances.

Continued on next page

Negligence, Continued

What happens if a resident is a victim of a criminal act,
(continued)

The resident has to demonstrate with a “preponderance of evidence” that you:

- intentionally tolerated illegal activity
- were negligent or careless in allowing it to occur, or
- failed to take reasonable precautions to prevent it

If the manager is found negligent, they may be liable for sizeable financial damages. Err on the side of caution and stress prevention! Remember, the damages suffered by the resident were caused by criminal activity. You can become liable for those damages if you acted unreasonably in the face of a foreseeable risk. Company policies exist to ensure “reasonable” responses.

FCC Ruling on Satellite Dishes, Central Antennas, and Exclusive Cable TV Contracts

Overview

Since the late 1990s, residents have been permitted to install satellite dishes for their use in their apartment home. The Federal Communication Commission (FCC) has permitted owners to fairly govern the method of installation and has made recommendations along those lines.

FCC rules

In its interpretation of the Telecommunications Act of 1996, the FCC has ruled the following.

- A resident of an apartment (or any leasehold space including seniors housing) may not be unreasonably restricted from installing an individual satellite dish of one meter or less in diameter or a traditional stick-type antenna on a balcony, balcony railing or patio that is totally within the premises being leased.
 - An existing exclusive agreement with a third party provider for television service to the property may not be used as a reason for restricting installation of a dish or antenna by an individual resident.
 - No dish or antenna may be installed on any common areas, including outside walls, outside window sills, roofs, common area balconies, common area stairwells or any other common area.
 - No holes may be drilled through outside walls, roofs, balcony railings or glass.
 - The property owner/manager is not required to install a central dish or other devices for residents who cannot otherwise receive a satellite signal.
-

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FCC Ruling on Satellite Dishes, Central Antennas, and Exclusive Cable TV Contracts, Continued

Resident requirements

Based on the FCC Order, a property owner/manager can insist on the following before an individual resident can install a satellite dish or antenna.

- A dish or antenna may only be installed on a balcony, balcony railing or patio that is totally within the individual leased premises.
 - No holes may be drilled in any exterior wall, roof, window or balcony railing.
-

Additional conditions

The following conditions can be applied to dish installation, so long as the conditions are not in conflict with any state or local laws.

- Residents can be required to sign a legal document holding the owner/manager harmless and assuming total responsibility for any personal or physical damage to property or persons as a result of damage or injury caused by the dish or antenna.
 - Residents can be required to obtain a reasonable amount of liability insurance adequate to fully cover claims that may be made by the property owner/manager or third parties as a result of damage or injury caused by the dish or antenna. The insurance should list the owner/manager as an additional insured.
 - Owners should encourage residents to have the dish or antenna installed by a professional. The “hook-up” to an inside receiving device can be made by either a flat cable under a sliding door or by means of a device on a window that allows a signal to pass through the glass.
 - Devices that extend the dish or antenna beyond the balcony railing or patio line may not be used.
 - So long as not prohibited by state or local law, a reasonable security deposit to cover any physical damage caused by installation may be requested.
 - • The satellite or antenna system must be a stand-alone system. A resident may not splice into any existing wires or cables.
-

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FCC Ruling on Satellite Dishes, Central Antennas, and Exclusive Cable TV Contracts, Continued

Satellite dish lease addendum The NAA Lease Package of documents contains a Satellite Dish Addendum that describes specifically the maintenance rules, required insurance coverage and installation requirements.

Central antenna option If the apartment property has a central dish or antenna for use by all residents, individuals may be prohibited from installing individual dishes if the central antenna provides the commercially acceptable signals that the individual viewer wishes to obtain and the cost of that central antenna service to the individual viewer is not greater than the cost of service the individual could obtain privately.

NOTE: Exclusive Contract Cable Ban-The FCC 2007 ruling that retroactively banned exclusive access agreements between apartment properties and cable television providers was upheld in 2009 by the U.S. Court of Appeals.

Human Resources

Reference Guide



Fair Credit Reporting Act (FCRA)

Overview

Because many onsite employees are required to handle money as well as expensive tools and equipment, such employment responsibilities are a permissible reason for an apartment owner or manager to obtain a consumer report. Employers requiring consumer reports must comply with the federal Fair Credit Reporting Act and any applicable state law.

Who this law covers

This law covers:

- consumer reports obtained from consumer reporting agencies on applicants and employees, and
 - all employers regardless of size.
-

What this law says

This law requires that employers:

- provide written notice to, and obtain authorization of the subject of the report, and
 - taking an adverse employment action due to information contained in a consumer report advise the applicant, and provide a statement of FCRA rights and the name and address of the consumer reporting agency that provided the report
-

Who enforces this law

This law is enforced by the Federal Trade Commission (for Credit Reporting Agencies (CRA), creditors and others, including employers).

How to comply

To comply with this law, follow these guidelines.

- Make job applicants (or employees) aware that a consumer report will be requested, and require them to sign a written authorization agreeing to the consumer report.
 - If you reject an employment applicant due to information received from a consumer reporting agency, you must give them two written notifications, and provide them with a copy of the report, a copy of a summary of their rights, and the credit reporting agency contact numbers. The two notifications include a pre-adverse action notice and an adverse action notice.
-

Title VII of the Civil Rights Act of 1964, as Amended

Who this law covers

This law covers all employers with at least 15 employees.

What this law says

This law prohibits discriminatory practices because of race, color, religion, sex, or national origin in recruiting, accepting applications, interviewing, hiring, training, reviewing, promoting, terminating employees, and any other employment decision. In other words, throughout the entire employment process, you must make sure that similarly situated employees are treated equally.

Who enforces this law

This law is enforced by the Equal Employment Opportunity Commission (EEOC).

How to comply

To comply with this law, follow these guidelines.

- In advertisements and job descriptions, avoid words suggesting any preferences with regard to race, color, sex, religion or national origin. For example, advertise for a “maintenance person” rather than a “maintenance man,” or a “leasing consultant” rather than a “leasing girl” so as not to suggest a preferred sex.
 - Advertise in publications with as wide a circulation base as possible.
 - Make sure that your application form complies with the law. Title VII prohibits either verbal or written questions regarding national origin, religion, sex, children, or other personal data that do not relate to job qualifications. State laws may also restrict allowable questions on application forms.
 - Ensure that job interviews are as uniform as possible by doing the following.
 - o Give each applicant equal time and attention.
 - o Use the same set of questions for each applicant for the same position.
 - o Take notes during the interview to document your hiring decision. (Don’t write on your application.)
 - o Focus on job-related issues and legitimate business interests during the interview.
 - o Avoid phrasing questions that might imply discrimination such as “Do you plan to have children?” or “Is your husband’s employer likely to transfer him?” Instead, ask “Is there any reason you might not stay with this company for the next few years?” or “What are your career objectives?” or “Where do you see yourself in five years?”
-

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Title VII of the Civil Rights Act of 1964, as Amended, Continued

How to comply (continued)

- o Display the EEOC poster (available in English and Spanish) with information for employees on:
 - their rights to be free from discrimination under Title VII (race, color, religion, national origin, sex)
 - the Americans with Disabilities Act (ADA)
 - the Equal Pay Act, the Age Discrimination in Employment Act (ADEA)
 - Executive Order 11246 (affirmative action for government contractors)
 - the Rehabilitation Act of 1973 (disability discrimination), and
 - the Vietnam Era Veteran's Readjustment Assistance Act of 1974
-

What record keeping is required

No specific recordkeeping is required, however, if records are created, they must be maintained for one (1) year from the creation date or the date of taking personnel action, whichever occurs later. It is good practice to keep records for up to four (4) years. Applicable records regarding hiring, promotion, demotion, transfer, layoff or termination, rates of pay or other terms of compensation and selection for training or apprenticeship must be maintained as well as application forms of both successful and unsuccessful applicants.

The Civil Rights Act of 1991

What this law covers

This law covers all employers with at least 15 employees.

What this law says

This law says that anyone suing for intentional discrimination based on race, color, sex, religion, national origin, age or disability is allowed to recover compensatory and punitive damages up to \$300,000, based on the size of the employer in addition to other damages allowed by law.

Note: This law is designed to address shortcomings of Title VII of the Civil Rights Act of 1964 as amended.

Who enforces this law

This law is enforced by the Equal Employment Opportunity Commission.

How to comply

To comply with this law, follow these guidelines.

- Proceed cautiously with adverse employment actions.
 - Avoid situations where an applicant or employee can assert willful discrimination.
 - Ensure that tests and policies are validated for neutrality and do not create an adverse impact against any group.
-

What record keeping is required

All records must be retained for one year (the same as for Title VII of the Civil Rights Act of 1964). It is good practice to keep records for up to four (4) years.

Age Discrimination in Employment Act (ADEA)

What this law covers

This law covers all employers with at least 20 employees.

What this law says

This law prohibits employment discrimination due to the employee or applicant being 40 years or older.

Who enforces this law

This law is enforced by the Equal Employment Opportunity Commission (EEOC).

How to comply

To comply with this law, follow these guidelines.

- In the recruiting, application process, or interviewing of job applicants, do not use questions regarding age, or questions, which would reveal age.
 - Don't advertise for a "recent college graduate," which suggests only young people need apply. State "college degree required" instead.
 - Always consider job performance in performance reviews and promotions.
 - Remember that mature and experienced employees can be valuable assets to your property and company.
 - Don't consider age when making employment decisions.
 - Don't inquire about or encourage retirement.
-

What record keeping is required

Records to be kept for one (1) year include:

- job applications
- resumes
- forms of job inquiries
- documentation regarding promotions, demotions, transfers, training selection, layoff, recall, or discharge

It is good practice to keep records for up to four (4) years.

Title I of the Americans with Disabilities Act

Who the law covers

This law covers all employers employing at least 15 employees.

What the law says

This law prohibits employment discrimination against qualified applicants or employees with a disability who, with or without reasonable accommodation, can perform the essential functions of the employment position.

Who enforces the law

This law is enforced by the Equal Employment Opportunity Commission (EEOC).

How to comply

To comply with this law, follow these guidelines.

- In interviewing and making hiring decisions regarding individuals with disabilities, be careful that your decision is based on the individual's ability to do the job, not on their disability. State the requirements of the specific job and ask the applicant if she or he can satisfy these requirements. You may also ask applicants to describe or demonstrate how they would perform job tasks. You should ask all applicants the same questions and not ask additional questions only to applicants who might have a disability. Consistent practices is key.
 - Make sure your job descriptions focus on the essential functions so that a person with a disability isn't eliminated from being considered for a job because of an inability to perform a marginal job duty.
 - Avoid questions in job applications and interviews that focus on possible disabilities.
 - Defer medical exams and medical inquiries until after you've made a conditional offer of employment.
 - If a question, inquiry, examination or test screens out someone, the exclusionary criteria must be "job-related and consistent with business necessity".
 - Examples of just some reasonable accommodations include: making existing facilities readily accessible (if not already, to comply with public accessibility laws), restructuring the job, creating temporary, part-time or modified work schedules, modifying equipment, or providing readers or interpreters.
 - If an applicant with a disability is not hired for safety reasons, you must demonstrate that the individual poses a "direct threat" to himself or others. This means that the individual poses a substantial threat to self or others, and that risk cannot be reduced or eliminated through reasonable accommodation.
-

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Title I of the Americans with Disabilities Act, Continued

**What record
keeping is
required**

Records that document health or medical condition must be maintained in a separate, confidential file from standard employment records. Access must be limited to supervisors, managers, safety workers, workers' compensation administrators and insurance company representatives.

Fair Labor Standards Act (FLSA)

Who the law covers

Broadly stated, employees are covered if they work for an “enterprise” which has 1) employees who handle, sell or otherwise work on goods or materials that have been moved in or produced for interstate commerce; and 2) an annual business dollar volume of at least \$500,000. Alternatively, employees can be covered individually if they themselves engage in interstate commerce or in the production of goods for interstate commerce, or to meet the needs of interstate commerce.

What the law says

This law sets requirements for timekeeping, minimum wage and overtime, plus regulates the employment of child labor.

Who enforces the law

This law is enforced by Enforced by the Wage & Hour Division of the Department of Labor.

How to comply

To comply with this law, follow these guidelines.

The FLSA exempts certain types of employees from some or all of its requirements. The U.S. Labor Department and the courts apply these exemptions very narrowly. If an exemption is challenged, it is the employer’s burden to prove that every element of a claimed FLSA exemption applies to the employee for whom it is asserted. There are many misconceptions about how exemptions work, and improperly applied exemptions are among the most-common FLSA violations. Here is a summary of the exemptions most frequently relied upon — and most often in dispute.

The so-called “white collar” exemptions from the FLSA’s minimum wage, overtime, and timekeeping provisions apply to those employed in a bona fide executive, administrative, or professional capacity, to certain computer employees, or to an “outside” salesperson. Whether these exemptions apply to a particular person depends in part upon what kind of work he or she actually performs, rather than whether the employee is well-paid, well-educated, well-thought-of or highly skilled, or whether the employee has a high-sounding job title or is in a position covered by an impressive-looking job description. Whether a person is an exempt “white collar” employee also depends upon how he or she is paid, with few exceptions. Exempt individuals generally must be paid on a “salary basis,” described below, at a rate of at least \$455 per week. But the reverse is not true: Salaried employees are not necessarily exempt.

Fair Labor Standards Act (FLSA), Continued

How to comply, (continued)

An executive has the primary duty of managing the business or part of it, regularly directs the work of at least two full-time employees; has the authority to hire, fire, and promote; and exercises discretion.

An administrative position must exercise independent judgment and discretion with respect to matters of significance and do work in support of an executive-exempt employee and that relates to management policies and general business operations. This exemption can be very difficult to establish and is often used inappropriately.

A professional employee has a college degree or a graduate degree and does work that requires advanced knowledge in a specialized field of learning, such as doctors, lawyers, teachers, accountants, scientists, computer programmers, and engineers.

A computer employee works as a computer systems analysts, computer programmers, software engineers, or similarly skilled employees whose primary duty consists of the application of systems analysis techniques and procedures, the design, development, documentation, analysis, creation, testing, or modification of computer systems or programs or machine operating systems.

An outside salesperson is someone who regularly works away from the employer's regular place of business and whose primary duty is making sales and taking orders, including doing paperwork, making deliveries, and collecting money related to those sales.

An employee also qualifies for "white collar" exempt status as a "highly compensated employee" if he or she: is paid on a "salary basis" or a "fee basis" at a rate of at least \$455 per week; has "total annual compensation" of at least \$100,000 (including both salary and commissions, nondiscretionary bonuses, and/or other nondiscretionary compensation earned in a 52-week period); has a primary duty that includes performing office or non-manual work; and customarily and regularly performs any one or more exempt duties or responsibilities of an executive, administrative, or professional employee.

Fair Labor Standards Act (FLSA), Continued

How to comply, (continued)

Paying a person on a “salary basis” generally means that he or she regularly receives each pay period a fixed, predetermined amount of money for every workweek in which the employee performs any work, without regard to the number of days or hours worked. Ordinarily, salary deductions may not be made from the salaries of “white collar” exempt employees based upon the quality or quantity of the work they perform. On the other hand, the salary need not be paid for a workweek in which the employee performs no work. Subject to very strict rules, an employer can make a deduction from salary for personal days off, sick days off subject to a written sick pay plan, first and last weeks of employment, offsets for jury/witness/military pay, major safety rule violations, full days of suspension for serious conduct violations, and FMLA leave.

Your state and local jurisdictions may have laws that apply which are different and/or have additional criteria.

Often in our industry, the property supervisors and onsite manager positions are defined as exempt, and all other onsite positions defined as hourly. Maintenance supervisors are also occasionally exempt. But remember, actual job duties, not job title, is what is determinative. Also, the number of people being supervised and the amount of time spent managing is critical.

Fair Labor Standards Act (FLSA), Continued

Non Exempt (Hourly)

For non-exempt employees, make sure that actual time worked is documented, and that they are paid accordingly. Do not allow overtime to be used as “compensatory time.”

In most cases, minimum wage will be less than the prevailing wage for any employment position in the property management industry. The reasonable value of meals, lodging, or merchandise can count toward an employee’s wages. Again, check with your state and local jurisdictions for applicable limitations.

Child Labor

If you hire anyone under the age of 18, you must comply with all applicable child labor laws. Special federal and state rules apply to work by children ages 14, 15, 16, and 17. Be sure to check all laws that will be applicable to your circumstance. Do not hire anyone under age 14.

What record keeping is required

The FLSA regulations on recordkeeping are extensive. In a nutshell, basic employment and earnings records such as wage-rate records and deductions from wages must be kept for a minimum of two (2) years, and supplemental records such as employment contracts, collective bargaining agreements, records on wages and hours must be kept for at least two (2) years.

The FLSA doesn’t address records being kept in two (2) locations, such as the corporate office and the onsite office. Maintain both sets of records subject to record-keeping requirements.

Reference: See Chapter 3 for detailed suggestions regarding onsite record keeping.

State and local jurisdictions may have additional retention requirements.

FLSA Overtime Rules

Who the law covers

Broadly stated, employees are covered if they work for an “enterprise” which has 1) employees who handle, sell or otherwise work on goods or materials that have been moved in or produced for interstate commerce; and 2) an annual business dollar volume of at least \$500,000. Alternatively, employees can be covered individually if they themselves engage in interstate commerce or in the production of goods for interstate commerce, or to meet the needs of interstate commerce.

What the law says

The FLSA generally requires that employers pay their employees at least the federal minimum wage of \$7.25 (or more in some states and localities) and one and a half times the employee’s regular rate for every hour worked in excess of 40 in a single work week.

The regular rate used to calculate overtime must be an hourly rate regardless of how the employee’s pay is otherwise computed. It is generally determined by dividing an employee’s total compensation (except for certain exclusions summarized below) for any workweek by the total number of hours he or she worked in that workweek which the compensation was intended to cover. If an employee is paid solely at one hourly rate of pay, then that is the individual’s “regular rate.”

Many employers fail to realize that all of a nonexempt employee’s pay must be included when computing the regular rate, unless the FLSA expressly permits the pay to be excluded. For instance, most bonuses must be figured into an employee’s regular rate, including, among many others:

- additional sums paid for meeting production, efficiency, or sales targets;
 - a “shift differential” paid to induce employees to work an undesirable shift;
 - cost-of-living bonuses;
 - good-attendance payments; or
 - distributions from a “gainsharing” pool
-

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FLSA Overtime Rules, Continued

**What the law says,
(continued)**

An employer must include in the regular rate the lesser of reasonable cost or fair value of meals, lodging, or similar facilities provided primarily for the employee's benefit and convenience. For example, if an employer furnishes lodging to an employee, the employer might be required to take the reasonable cost or fair value of the lodging into account for overtime purposes. On the other hand, it is sometimes possible to exclude these sums from the regular rate. Whether it is necessary to include these amounts in particular situations, and how one should approach the calculations if it is, should be assessed on a case-by-case basis.

Some workers are exempt from those requirements, for example, executive, administrative and professional employees aren't covered. Outside sales personnel, skilled computer workers and highly compensated employees are also exempt from these requirements. Collectively, these workers are "exempt employees." The following table describes the positions that are exempt from these requirements.

FLSA Overtime Rules, Continued

(continued)

Exemption	Description
Executive	<p>Generally, an executive employee’s primary duty (as a rule of thumb, more than 50% of his or her time) must be managing the organization or a customarily recognized department or other subdivision of the organization. “Management” can mean lots of different things, but it generally includes activities such as being involved in hiring, directing, evaluating, disciplining, and firing employees; deciding what work will be done; planning, assigning, and prioritizing work; determining what materials will be used, bought, stocked, or sold; and so on. The executive must customarily and regularly direct the work of at least two or more other full-time employees or the equivalent (“full-time” usually means 40 hours a week but can be less in particular instances). The executive must also have the authority to hire or fire, or must at least make suggestions and recommendations as to the hiring, firing, advancement, promotion, or any other significant change of status of other employees that are given particular weight.</p>
Administrative	<p>An employee’s primary responsibilities must involve “office” work or other non-manual duties that directly relate to the employer’s operations or “management policies.” The employee must exercise discretion and independent judgment on important subjects.</p> <p>This exemption is rarely applicable in many apartment firms.</p> <p>To determine if an employee qualifies for this exemption, ask the following questions.</p> <ul style="list-style-type: none"> • Is the type of work performed related to the business’s operations or management? • Does the employee’s primary duty involve exercising discretion regarding significant issues?

Continued on next page

FLSA Overtime Rules, Continued

(continued)

Professional	An employee’s primary duty must be intellectual in nature, require “advanced knowledge” and involve the exercise of discretion and judgment. Advanced knowledge must cover a field of “science or learning” customarily acquired by specialized study. Some examples cited by DOL are lawyers, doctors, scientists, teachers, engineers and registered nurses.
Highly-compensated Employees	Workers who earn at least \$100,000 annually, and who are paid on a salary basis, are also exempt from the overtime provisions so long as they primarily perform office work and “customarily and regularly” perform at least one duty of an executive, administrative or professional nature.

Continued on next page

FLSA Overtime Rules, Continued

(continued)

Note: Employees' job titles do not determine their exempt status; their salary and duties do. Thus, simply adding the word "manager" to employees' titles, for example, does not make them exempt from overtime unless their job duties truly reflect those of an exempt employee.

The table below describes the three tests that are used to determine whether an employee is eligible for overtime pay, according to DOL's updated regulations.

Test	Description
Salary (Compensation Level)	Generally, if employees earn less than \$455 per week, or \$23,660 annually, they are eligible for overtime pay even if the worker meets one of the exemptions discussed below. Conversely, if employees earn more than the \$455 per-week threshold, they can be exempt from the FLSA's overtime requirement, but only if the employee also meets the salary basis and duties tests.
Salary Basis Test	Even if an employee earns \$455 per week or more, the employee must also be paid on a salary basis (rather than an hourly rate) and perform the duties of a bona fide exempt executive, administrative or professional worker to be exempt from overtime requirements. In other words, exempt employees generally must receive their full, pre-determined salary for any week in which they work, regardless of the number of days worked or how well they performed. Improper deductions destroy the salary basis.
Duties Tests	There are essentially three duties-related exemptions from overtime requirements: one for executive employees, one for administrative employees and one for professional employees.

Continued on next page

FLSA Overtime Rules, Continued

Who enforces the law

This law is enforced by enforced by the Wage & Hour Division of the Department of Labor.

How to comply

Apartment firms and independent rental owners must review the actual job duties and compensation level of each employee carefully to ensure they are an eligible employee under the FLSA and/or that a particular employee is properly classified and compensated under the Fair Labor Standards Act.

Proactively consulting legal counsel and a professional human resources team regarding exempt and non-exempt status will help to avoid costly investigations and litigation in the future.

What record keeping is required

Independent rental owners who tend to hire fewer employees to perform wide-ranging responsibilities are particularly encouraged to perform regular compliance audits with attention to the tests, as well as other related provisions of the FLSA rules dealing with housing benefits, recordkeeping requirements and properly determining overtime wages.

State Law

Many states have laws similar to the FLSA. Always check state law to ensure you are in compliance.

Equal Pay Act

Who the law covers

As part of the FLSA, employees are covered by the Equal Pay Act. Broadly stated, employees are covered if they work for an “enterprise” which has 1) employees who handle, sell or otherwise work on goods or materials that have been moved in or produced for interstate commerce; and 2) an annual business dollar volume of at least \$500,000. Alternatively, employees can be covered individually if they themselves engage in interstate commerce or in the production of goods for interstate commerce, or to meet the needs of interstate commerce.

What the law says

This law requires employers to pay equal wages to male and female employees who are performing similar work of equal skill, effort, and responsibility.

This law does allow for differences in pay if the inequality results from a seniority system, a merit system, or a system that measures the quality or quantity of production, or on some factor other than sex.

Who enforces the law

This law is enforced by the Equal Employment Opportunity Commission (EEOC)

How to comply

To comply with this law, make sure that you do not pay an individual more or less because they are or are not “head of household” or because they are male or female.

What record keeping is required

No specific recordkeeping is required, but because the act does focus on a type of discrimination it is suggested that records be maintained under the requirements for Title VII of the Civil Rights Act of 1964, which is one (1) year from date of making the record or taking the personnel action involved, whichever occurs later or up to four (4) years based on certain state laws.

Occupational Safety and Health Act (OSHA)

Who the law covers

This law covers private sector employers with limited exceptions for some requirements.

Reference: See the *Risk Management Participant Guide* for additional information.

What the law says

This law regulates workplace safety and health.

Who enforces the law

This law is enforced by the Occupational Safety and Health Administration.

How to comply

OSHA requirements

OSHA requires you to do the following.

- Provide employees a workplace free from recognized hazards to health and safety.
- Comply with the safety and health standards promulgated by OSHA, including:
 - implementing a safety program daily
 - practicing the Hazard Communication Standard which requires you to give information to your employees about the hazardous chemicals they may come into contact with or handle
- For employers with 11 or more employees, maintain a log and summary of all injuries and illnesses, as well as supplemental records detailing the incidents.
- Provide regular safety training to give employees updated information and ensure that safe work procedures are practiced.
- Report any job-related fatality or overnight hospitalization of three (3) or more employees to OSHA within eight (8) hours of the accident. Fatalities or hospitalization that occurs more than thirty (30) days after the work incident do not need to be reported.

Suggested guidelines

In addition, to comply with this law, follow these guidelines.

- Conduct periodic inspections of offices, storage facilities, and maintenance shops to make sure they comply with your safety program. They should be clean and organized, and properly maintained.
-

Continued on next page

Occupational Safety and Health Act (OSHA), Continued

How to comply, (continued)

- Maintain Safety Data Sheets (SDS) in a binder and have them readily accessible to all employees. An SDS provides pertinent safety and health-related information regarding hazards associated with handling, storage, use, transportation and exposure to a hazardous material, chemical, or substance. The manufacturer and distributor/vendor are responsible for providing you with the SDS sheets of materials, chemicals, or substances that are purchased for your property.
 - Requires that all employees read and understand your safety policies and receive instructions in how to work safely before they start a job.
 - Provide personal protective equipment (PPE) and make sure it is used as standard operating procedure.
-

Potential consequences of failure to comply

The consequences of noncompliance include penalties for violations, which vary depending on the seriousness of the violation.

OSHA looks at several factors to determine penalties, including:

- the seriousness of the hazard
- your history of violations
- whether good faith effort has been made to comply, and
- the size of your company and business.

Penalties of up to \$15,000 per day may be proposed for each failure to correct a violation by the abatement dates shown on the citation.

An employer who receives a citation for a serious violation may be assessed a penalty of up to \$25,000 for that violation.

Penalties for general and regulatory violations may be assessed up to \$7,000 per violation.

A penalty of not less than \$5,000 or more than \$70,000 may be assessed against an employer who willfully violates any occupational safety and health standard or order.

The maximum penalty that can be assessed for each repeat violation is \$70,000.

Note: OSHA may issue citations to employers for failing to adhere to any of the record keeping rules and regulations or for failing to keep the workplace free from recognized hazards.

Occupational Safety and Health Act (OSHA), Continued

What record keeping is required

Employers must make all records deemed necessary to enforce OSHA or prevent occupational injuries and illnesses available to the Department of Labor and the Department of Health and Human Services.

Required records

Employers are required to maintain accurate records of:

- work-related deaths, injuries and illnesses
- employees exposed to potential toxic materials or harmful physical agents which are required to be monitored and measured under the statute, and
- safety training efforts and employees attending the training

Note: OSHA requires employers to make medical records and records of exposure to toxic substances or harmful physical agents available to current or former employees.

Required forms

There are three elements to the OSHA record keeping system. Not all employers are required to keep all OSHA records and you should consult with legal counsel to determine your Company's obligations.

- The OSHA log (Form No. 300), which classifies injuries and illnesses, notes the outcome of each occurrence, and summarizes occupational injuries and illnesses. Incidents must be recorded within seven (7) working days after an injury or illness case.
- The Injury and Illness Incident Report (OSHA Form No.301) is to be completed within seven (7) days after notification of an illness or injury.
- The annual summary must be prepared at the end of each calendar year and includes a copy of the year's total injuries and illnesses from the log. The summary must be prepared even if there are no injuries or illnesses and recorded in the OSHA Form No. 300A log. The summary must be posted, in a location where employees are certain to view it, no later than February 1 of the following year and is to remain in place until March 1.

Length of record maintenance

Records are to be maintained at each physical location for a period of five (5) years following the end of the year to which the annual records refer. Employee medical records of exposure to toxic substances must be maintained for thirty (30) years

Employee Retirement Income Security Act (ERISA)

Who the law covers

This law covers employers who maintain or sponsor pension and welfare plans.

What the law says

This law regulates employee pension and welfare benefit plans.

Who enforces the law

The Secretary of Labor has responsibility to investigate violations and file lawsuits.

How to comply

To comply with this law, follow these guidelines.

- Know the basics of your company retirement or pension plan.
 - Appoint a plan administrator (someone who is responsible for following through on the law's requirements).
 - Plan administrators are required to give employees a summary plan description (usually in booklet form) within 90 days after they begin participating in the plan.
 - Know who your plan administrator is so that you can refer eligible employees with questions regarding their pension plans.
-

What record keeping is required

Records must be kept for six (6) years supporting the data in Summary Plan Descriptions and related welfare pension reports. The employer keeps these records and the Summary Plan is provided annually to employees or can be obtained from the employer upon request.

Note: Records needed to determine eligibility for benefits must be retained as long as relevant.

Immigration Reform and Control Act (IRCA)

Who the law covers

This law covers all employees hired after November 6, 1986.

What the law says

This law:

- prohibits discrimination with regard to hiring, recruiting, or discharging employees based on national origin or citizenship status, and
 - prohibits employers from hiring illegal aliens and requires verification of work eligibility status through the processing of an I-9 form
 - prohibits employers from knowingly accepting false documents
-

Who enforces the law

This law is enforced by the Department of Homeland Security.

How to comply

To comply with this law, follow these guidelines.

- Do not refuse to hire an individual because you believe they may not have legal employment status. Let the verification process of the I-9 form determine eligibility.
- Do not ask to see more or different documents than those required for completion of the I-9.

Caution: It is illegal to refuse to honor documents offered by the employee that reasonably appear to be genuine and related to the individual in question. It is also illegal to request more documents than required by form I-9.

What record keeping is required

The I-9 and supporting documents must be completed within 72 hours after hiring. The I-9 form along with copies (if you made copies) of supporting identification and work authorization documents must be kept for three (3) years after the employee is hired and one year after termination.

National Labor Relations Act (NLRA)

Who the law covers

This law covers all private sector employers that have an impact on interstate commerce.

What the law says

This law regulates all labor-management relationships and prohibits discrimination based on union activity.

Note: Unionization sometimes begins because employees are dissatisfied with some aspects of their work life. .

Who enforces the law

This law is enforced by the National Labor Relations Board (NLRB).

How to comply

To comply with this law, follow these guidelines.

- Private employers need to be familiar with the law and/or the collective bargaining agreement specifics. Consult your company Human Resources department or Legal counsel relative to your responsibilities in this regard.
 - You are prohibited from interfering, restraining, or coercing employees in regard to union participation, membership or concerted activities protected by the Act.
-

What record keeping is required

No specific recordkeeping is required, however, because this law is a consequence of employer actions, written reprimands or disciplinary action documents might be subject to review in the case of a dispute.

Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA)

Who the law covers

This law covers all employers.

What the law says

This law prohibits employment discrimination because of an employee's or applicant's past, current, or future military obligations. It also requires employers to reinstate employees to their former jobs upon completion of military duty.

Who enforces the law

This law is enforced by the Office of Veterans' Employment and Training Service (VETS) of the Department of Labor.

How to comply

To comply with this law, follow these guidelines.

- If you have an employee who is a member of the "uniformed services" and is called into service, allow an unpaid leave of absence (per the law, may be up to five (5) years).
 - When an employee is honorably discharged, reinstate them into the position the employee would have had but for the military service, and allow the time absent to accrue toward seniority, benefits and other provisions of employment.
 - Do not encourage an employee to "just quit." Offer the employee the legally required leave of absence.
 - Do not discriminate against an employee with military training or service obligations.
-

What record keeping is required

No specific recordkeeping is required, however all employment records that are retained may be subject to review should a claim be filed.

Jury Systems Improvement Act

Who the law covers

This law generally covers all employers.

What the law says

This law prohibits an employer from disciplining or discharging an employee because she/he has been called to serve on a federal jury.

Who enforces the law

This law is enforced by the Department of Justice.

Suits may be filed in Federal District Court.

How to comply

To comply with this law, you must grant unpaid leave to employees performing federal jury service and reinstate employees to their jobs when jury service is over.

Note: Although this law addresses federal juries, it may be a good idea to allow unpaid leave for any jury summons because similar laws may exist at the state or local level. Additionally, some states require paid jury duty. Please check state and local law or consult legal counsel.

Employment Polygraph Protection Act

Who the law covers This law covers most private sector employers and would cover apartment management firms.

What the law says This law prohibits employers from requiring applicants to submit to polygraph examinations. In very limited and regulated circumstances, the law does permit polygraph testing of certain employees suspected of involvement in a workplace incident (for example, theft, embezzlement, and so on) that results in economic loss to the employer.

Who enforces the law This law is enforced by the Secretary of Labor, who may bring court actions and assess civil penalties.

How to comply To comply with this law, follow these guidelines.

- Do not use polygraphs as a means of pre-employment screening.
- Consult with legal counsel and carefully evaluate whether the facts allow for an employee polygraph in the event of a workplace incident resulting in an economic loss.
- Do not allow an employee to volunteer to take a polygraph test.

What record keeping is required A copy of any statement that was provided to employees, relating the specific incident being investigated that resulted in the economic loss to the employer must be retained for three (3) years.

Every employer subject to the EPPA must post a poster advising employees of their rights under the Employee Polygraph Protection Act of 1988.

Also the basis for testing, records of employer loss, nature of employee's access to person/property being investigated or any other records relating to the incident or testing must be retained for three (3) years.

Family and Medical Leave Act (FMLA)

Who the law covers

This law covers all employers that employ 50 or more employees at a worksite or at all worksites combined within a 75-mile radius.

This law covers employees who have worked at least 12 months for the Company in the preceding seven years (limited exceptions apply to the seven-year requirement) and have worked at least 1,250 hours for the Company over the preceding 12 months.

What the law says

FMLA leave may be taken for the following reasons:

1. birth of a child, or to care for a newly-born child (up to 12 weeks);
2. placement of a child with the employee for adoption or foster care (up to 12 weeks);
3. to care for an immediate family member (employee's spouse, child, or parent) with a serious health condition (up to 12 weeks);
4. because of the employee's serious health condition that makes the employee unable to perform the employee's job (up to 12 weeks)
5. to care for a Covered Service member with a serious injury or illness related to certain types of military service (up to 26 weeks); or,
6. to handle certain qualifying exigencies arising out of the fact that the employee's spouse, son, daughter, or parent is on duty under a call or order to active duty in the Armed Forces (e.g., National Guard or Reserves) in support of a contingency operation (up to 12 weeks).

The maximum amount of leave that may be taken in a 12-month period for all reasons combined is 12 weeks, with one exception. For leave to care for a Covered Service member, the maximum combined leave entitlement is 26 weeks, with leaves for all other reasons constituting no more than 12 of those 26 weeks.

In addition to a total "time away from work" leave, this act also allows for reduced work hours or days.

Who enforces the law

This law is enforced by the Secretary of Labor with complaints filed with the local office of the Wage and Hour Division of the Department of Labor.

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Family and Medical Leave Act (FMLA), Continued

How to comply To comply with this law, follow these guidelines.

- Ensure that your company has a policy regarding this law that clearly defines the limitations and requirements for the employee and the employer.
- Your FMLA policy must be included in your employee handbook if you have a handbook.
- If health insurance is provided, continue it during the leave, with no extra charges to employees. Premium amounts paid by the employee by deducting from their checks must continue to be paid by the employee, or a payback arrangement may be made.

Note: Employers are not required to pay employees during the leave period.

- Reinstatement of the employee to the same or equivalent position when she/he returns to work within the time allowed.
 - Display a poster titled “Your Rights Under the Family and Medical Leave Act of 1993” in the workplace and ensure that your employee handbook explains the FMLA.
 - Provide written guidance on employee rights and responsibilities to anyone who requests leave. A booklet called *Compliance Guide to the Family and Medical Leave Act* is available from the Wage and Hour Division of the U.S. Department of Labor. See www.dol.gov
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What record keeping is required

Keep the following records on file and available for review for four (4) years:

- payroll data
 - leave documents
 - employer’s notices describing leave benefits and policies
 - premium payments
 - records of disputes, and
 - medical records (which must be kept separate)
-

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Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA), as amended

Who the law covers This law covers all private sector employers with 20 or more employees (except for churches and synagogues) with a group health plan.

What the law says This law allows for the extension (for 18 months or 29 months if disabled at the time of the loss of coverage) of group insurance coverage to employees and/or their dependents on a self-pay basis, who would otherwise lose their coverage due to reduced work hours, termination, leave, or any other discontinuation of employment. The ex-employee has 60 days following the notice to elect in writing to continue their coverage.

Who enforces the law This law is enforced by the Secretary of Labor, who has the right to investigate complaints, violations, and file a lawsuit.

How to comply To comply with this law, follow these guidelines.

- Notify the employee of their right to continue coverage, within 14 days from employee separation date.
- Require a return receipt for all notices, initial and on-going.
- Collect the ex-employee premium each month.

Note: If the ex-employee fails to send the payment when due or within the grace period, coverage may be canceled.

Your human resource department, payroll administrator, or insurance company will most likely be responsible for compliance with COBRA.

What record keeping is required There are no official record-keeping requirements; however, the employer should keep records of the steps taken and letters sent to employees to notify them of their rights to extend health benefit coverage at their own expense.

Health Insurance Portability and Accountability Act of 1996 (HIPAA)

Who the law covers

This law covers all employers who provide health coverage.

What the law says

This law provides standards for an employee's new group health plan to limit or exclude pre-existing conditions. Previous employers are required to provide a Certificate of Creditable Coverage, which documents for the new health plan the prior plan's creditable medical coverage. This Certificate of Creditable Coverage will come from the prior health insurance carrier after notification by the former employer of the employee's termination.

Who enforces the law

This law is enforced by the Secretary of Labor, who has the authority to investigate complaints, violations, and file suit.

How to comply

Compliance with this law is more the responsibility of the employer's medical insurance company.

What record keeping is required

The plan administrator for the employer is responsible for providing HIPPA documentation. If you are the designated plan administrator, make sure that you have copies of employee enrollment documents, and any correspondence from/to the insurance company in a separate file from the employee's personnel file.

Employee Handbook

Sample outline Following is a comprehensive list of management issues and policies that may be included in an employee handbook.

- Principles and Practices of Employment
 - o Contract Disclaimer
 - o Employment-at-Will
 - o Arbitration Agreement
 - o Equal Employment Opportunity statement
 - o Americans with Disability Act statement
 - o Proof of US Citizenship statement
 - o I-9 Form Compliance
 - o Fair Housing Policy and Acknowledgement
 - o Ethics Statement
 - o Conflict of Interest
 - o Employment of Relatives
 - o Confidentiality Statement
 - o Recruiting Practices
 - o Grievance Procedures
 - o Rehire Policy
 - o Transfer/Promotion Policy
- Employee Benefits
 - o Insurance Benefits
 - o Benefit Eligibility
 - o COBRA
- Timekeeping and Payroll
 - o Status
 - o Exempt/Non-Exempt
 - o Full or Part Time
 - o Permanent or Temporary
 - o Timekeeping
 - o Overtime
 - o Rest & Meal Periods
 - o Payday Schedules
 - o Pay Procedures

Continued on next page

Employee Handbook, Continued

Sample outline, (continued)

- Absence From Work
 - Vacation
 - Holiday
 - Sick
 - Personal
 - Family Medical Leave
 - Military Leave
 - Personal Leave
 - Jury Duty – Witness Duty
 - Voting Leave
 - Worker’s Compensation Absence
 - Bereavement Leave
 - Civic Activities
- Employee Conduct
 - Employee Safety
 - Harassment Policy & Complaint Procedure
 - Alcohol & Drug-Free Workplace Policy
 - Weapon Policy
 - Smoking Policy
 - Grooming & Attire (Dress Code)
 - Use of Bulletin Board
 - Use of Telephones and cell phones
 - Use of Computer Hardware, Software, Internet
 - Use of Keys
 - Solicitation and Distribution of Literature
 - Performance Evaluations
 - Discipline Procedures
- Termination Policy and Procedures
 - Involuntary Termination
 - Resignation
 - Severance Pay
 - Vacation Pay Upon Termination
- Miscellaneous
 - Acknowledgement of Receipt of Handbook
 - Mileage Reimbursement
 - Travel Reimbursement
 - Living onsite
 - Leasing Bonuses
 - Tuition Assistance
 - Absenteeism and Tardiness
 - Basic Work Rules
 - Confidential Information

Limiting Employer Liability

Tips on limiting liability

Keep the following in mind to help limit liability.

- Periodically review, re-evaluate, and revise all written company policies, employment applications, employee handbooks, training materials, performance review forms, and any form letters offering or terminating employment.

Reference: See the topic “Employee Handbook” in Chapter 3 for helpful points on writing an employee handbook.

- Document actions to establish a “paper trail.” Maintain inclusive personnel files regarding hiring, exit interviews, counseling, reprimands, warnings, probationary notices, performance reviews, attendance records, commendations and awards, and any oral reprimands. If you have a file full of problems with an employee, assume that this file may end up in court.
- Periodically train and re-train recruiters, supervisors, managers, interviewers and personnel staff about employment law and issues. Make sure they know company policy changes, and what or what not to say, and how to document.
- Establish progressive disciplinary procedures and make sure that they are evenly enforced. Progressive discipline communicates your expectations to the employee and provides written warning of failure to perform consequences. Many potential problems can be resolved before they happen, plus employee morale is higher when they know that they will have an opportunity to improve their performance.
- Make sure that performance reviews are fair, candid, accurate, on time, and comply with company policy. This feedback is the best tool that an employee can have for improving performance and providing a plan for future action.
- Employees should be required to read and acknowledge that they understand, sign, and date crucial employment documents.
- Consistently apply all company policies. Even-handed enforcement provides a basic comfort level for all employees because they know that they will not be treated differently.
- A confidential and effective internal problem solving or grievance procedure should be in place and should be well publicized to all employees, especially managers and supervisors. Due to the importance of this issue more information is provided later in this chapter.

When to seek legal advice

It is much better to be pro-active rather than reactive. Start now by establishing a relationship with an employment attorney before there is a complaint or problem.

Continued on next page

Limiting Employer Liability, Continued

**When to seek
legal advice,
(continued)**

Consulting with an attorney before taking an adverse employment action can assist the organization in formulating lawful policies and procedures, confirming that proposed actions do not violate employment laws, and minimizing liability exposure.

Consult with attorneys who specialize in representing management for employment issues. Check with the local or state bar association for a list of such specialists, or talk with another management company that uses an attorney for employment advice.

Workplace Violence

Profile of a typical offender

The typical workplace violent offender is male, over 35, with significant job tenure, socially isolated, chronically disgruntled, and resentful of authority. He views change with suspicion, externalizes blame and may have a history of substance abuse. A profile of such an offender is simply a generalization. Anyone can commit acts of violence in the workplace. Within the apartment industry, potential situations might include a disgruntled resident or employee, or a domestic violence situation either with a resident or an employee.

Tips on preventing workplace violence

Some of the tips on preventing workplace violence, offered by experts on workplace violence, include the following.

- Create a corporate environment that is healthy and welcoming and promotes respect for others. Make sure that your company and property does not tolerate negative gossip, bullying, racism, or sexism.
 - Use sound and consistent hiring practices to help identify potential problem applicants. Check criminal, work, education, and credit histories. Be kind, tactful, and respectful of the dignity of applicants that are denied employment.
 - Use subcontractors and temporary personnel agencies that use the same hiring standards as those used by your company.
 - Use the highest level of physical security in your workplace as is practical and possible.
 - Design and implement a violence prevention program that conforms to your company size and needs. If possible, have an expert audit your property to identify and problem-solve vulnerable areas. Include a list of behaviors that violate company policies, and procedures for reporting.
 - Know the warning signs of potential problems. Seventy-five percent of employees committing violent acts have displayed clear warning signs prior to the actual event.
 - Train onsite employees to identify potential problems, and to respond to developing violent situations.
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Workplace Violence, Continued

Tips on handling workplace violence

Some of the tips on handling workplace violence, offered by experts on workplace violence, include the following.

- If you are faced with an out-of-line aggressive resident or employee, warn others and leave the area immediately and call the police. Do not attempt to reason with a violent individual. Avoid taking any actions that might trigger a violent response.
 - Take all complaints seriously and intervene quickly and effectively. Make sure a zero-tolerance policy is enforced.
 - If an incident is reported, consider placing the employee on administrative leave with pay while a detailed investigation is performed. A fitness for duty examination that includes a drug test and psychological evaluation might be required before the employee is permitted to return to work.
 - Conduct termination interviews privately, as respectfully as possible. Assist the employee in “picking up the pieces” by offering employment counseling or providing sources for job search assistance.
-

Employee Training

Overview

Employee training is a key ingredient to your success as an apartment manager. Training is a skill and like any other job skill must be learned. Learning to train employees is a crucial ingredient to your success as an apartment manager. It is serious business and one that can have significant consequences, for the employee and the manager, if not handled properly. If you have employees who cannot do their job your first question should be “Have I trained them properly?” Or, “Does this person need more training?”

Prioritize training

One of the biggest mistakes managers make is to assume that training is to be scheduled when everything else is finished and more time is available. In the fast paced world of managing apartments there is never enough time and always too many tasks waiting for completion.

Benefits of training

Training provides many benefits and rewards for both the employee and the company. Consider the following benefits of training.

Benefit	How It Helps
Training reduces expenses.	If your staff knows how to do their job the right way, expenses will be reduced. For example, a properly trained make-ready technician will be less wasteful with supplies and more efficient with time spent, thereby reducing the cost of making an apartment ready for occupancy. If people are properly trained, employee turnover expenses, such as employment testing, employment agency fees and even legal fees to handle wrongful termination or fair housing lawsuits, will be reduced.

Continued on next page

Employee Training, Continued

Benefits of training (continued)

Benefit	How It Helps
Training helps provide consistent service to your residents.	Your staff will improve their skills to work with people. Residents stay happier when they receive the consistently excellent service they expect.
Training saves time.	A well-trained staff is more prepared and more eligible for promotion opportunities. It is personally rewarding to watch employees that you have trained and nurtured be promoted to higher paying positions and more responsibility.
Training creates a team spirit.	As you show your concern for employees through quality training, you help motivate them and keep their morale high. Training and motivational programs are often combined to create a powerful personal improvement experience. Training programs can provide more fun while at work thereby reducing stress and increasing productivity.
Training helps solve problems.	Not all training is fun and games. Training should be used to correct operational and/or maintenance problems and to prevent harassment, discrimination, and retaliation. Training should include safety training to correct bad habits and paperwork/computer training to correct administrative errors.

Continued on next page

Employee Training, Continued

Benefits of training, (continued)

Benefit	How It Helps
Training is for everyone.	Focus your training efforts on every job level. Start new employee training on the employee's first day. Train existing employees to upgrade their knowledge level and provide long-term professional development.
Training aids supervision.	Isn't it easier to supervise a staff that you have trained? The training process helps you bond with employees as you guide them to succeed. They learn that you are not just the boss but also a caring coach who will help them work toward personal goals. This relationship, developed during training, makes supervising the employee a much easier task.

Training adults

Consider these points when training adults.

- Adults are experienced learners.
- Adults want practical, useful information and skills to do a better job.
- Adults prefer to be active, not passive, learners.
- "Life" always intervenes. Adults have very real pressures and responsibilities during the time they are being trained; training should be clear and direct.

Regardless of the type of training needed, planning is paramount. Present the training and evaluate the process upon completion. Failing to plan your training activities is a sure way to have your training programs fail.

Continued on next page

Employee Training, Continued

New employee orientation

Orientation is a form of training.

Reference: See the topic “New Hire Orientation” in Chapter 3 for additional information.

Skills assessment

Determining employees’ skills is part of determining the training that will be appropriate. Once you know what your employees can and cannot do, you will know what type of training to provide.

Shopping reports are an effective way to monitor the skills of leasing consultants. Use a professional shopper that is accustomed to evaluating leasing skills. Many shoppers now do video reports and audio taped telephone reports.

Use the report to discuss the consultant’s strengths and weaknesses, company closing ratio standards, etc. Compare the original report with reports obtained later to analyze and gauge the consultant’s progress. Use the reports to plan training programs for needed improvements.

Training program topics

The following is a list of ideas to stimulate your imagination for topics to cover in your staff meetings/training programs.

Safety

- handling a fire onsite
 - using personal protective equipment
 - understanding material safety data sheets
 - reporting an accident
 - safety in the maintenance shop
 - preparing for a hurricane
 - severe winter weather alerts
 - blood borne pathogens
 - electrical cord safety and lock-out/tag-out program
 - employee injury
 - workplace violence
 - safety inspections
-

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Employee Training, Continued

Training program topics, (continued)

Company/Property Policies/Procedures

- understanding employee insurance
 - employee handbook review
 - harassment, discrimination, and retaliation in the workplace
 - resident retention ideas
 - maintenance for office staff members
 - how to properly take a service request
 - understanding the computer system
 - accepting packages for residents
 - pool school
 - keeping the community clean, clean, clean
 - move-in file preparation/administration
 - delivering superb customer service
 - how to use the guest card
 - business etiquette
 - fair housing compliance
-

Task Training

When task training is appropriate

Training for motor tasks is sometimes called “hands-on” or “one-on-one” training. It is best done on the actual equipment used on the job, for example, a computer, key machine, etc.

It is always tempting to expect an employee to understand how to do a specific task by telling them what to do. This process causes employees to stumble along trying to figure things out. Consequently a lot of time and energy is wasted.

Show and tell

The best approach is to show and tell about the task at hand. Consider this concept: “Tell me and I will not remember. Show me and I think I will remember. Involve me and I will understand.”

Different learning styles

Some employees are reluctant to get involved in the skills-learning process and are anxious to get their hands on the computer, equipment, etc., as soon as possible. Having the employee “hear it, see it and say it” is crucial to the adult learning process. It is an excellent use of your time to conduct task training in this manner.

Task training process

The table below describes the task training process.

Stage	Description
1	The employer tells the employee about the task and what to do and then demonstrates the procedure. <i>Note:</i> As you demonstrate and explain each part of the task remember to discuss not only what you are doing, but also how and why.
2	The employee tells the employer about the task and the employer demonstrates the procedure following the employee’s instructions.
3	The employee tells the employer about the task and the employee demonstrates the procedure.

Group Training

Overview

Use staff meetings and/or group training programs when several employees need to learn the same information.

Group training process

The table below describes the group training process.

Stage	Description
1	<p data-bbox="521 615 748 646">Before the meeting</p> <p data-bbox="521 699 1446 772">The following suggestions will help the trainer structure staff meetings or training sessions.</p> <ul data-bbox="540 825 1471 1434" style="list-style-type: none"> <li data-bbox="540 825 1458 926">• Determine the objectives and the time needed for the meeting. Perhaps it will be a short meeting concerning changes in a policy or procedure or maybe a full-blown training session on how to use safety equipment. <li data-bbox="540 932 1471 999">• Identify the staff members that need to attend the meeting. Sometimes you may need only the office personnel and other times the whole staff may need to attend. <li data-bbox="540 1005 1463 1178">• Make arrangements for the meeting facility. Staff meetings are usually held in the office or clubroom. Training sessions may be held in a remote facility or another location on the property. For example, if you are teaching employees on the proper use of a fire extinguisher, it would be appropriate to hold the training session in an outdoor location such as a parking area/garage. <li data-bbox="540 1184 1370 1215">• Prepare the facility and arrange for necessary equipment, supplies and refreshments. <li data-bbox="540 1222 1455 1289">• If you are not personally conducting the meeting arrange for a speaker/trainer. If you need the assistance of other employees make sure that you give them enough time to prepare. <li data-bbox="540 1295 1463 1362">• Prepare and have all participants sign an attendance record for each meeting. Maintain them in a permanent file and elsewhere as your company requires. <li data-bbox="540 1369 1442 1436">• Start and end the meeting on time. Participants should know in advance approximately how long the meeting will last.

Continued on next page

Group Training, Continued

Group training process, (continued)

Stage	Description
2	<p data-bbox="521 380 748 415">During the meeting</p> <p data-bbox="521 464 1469 579">The trainer's role is to keep the meeting moving smoothly and provide the missing elements necessary to meet predetermined objectives by making an effort to do the following.</p> <ul data-bbox="542 632 1433 989" style="list-style-type: none"> <li data-bbox="542 632 935 663">• Start promptly and follow the agenda. <li data-bbox="542 667 818 699">• Answer questions clearly. <li data-bbox="542 703 878 735">• Limit unnecessary conversation. <li data-bbox="542 739 927 770">• Defuse conflict between participants. <li data-bbox="542 774 1109 806">• Clarify required action and make applicable assignments. <li data-bbox="542 810 1304 842">• Encourage interaction by asking participants to answer appropriate questions. <li data-bbox="542 846 1433 919">• Use visual aids, such as handouts, workbooks, overhead transparencies, to keep employees interested. <li data-bbox="542 924 802 955">• Summarize discussions. <li data-bbox="542 959 1230 989">• Close the meeting by recapping decisions, assignments and deadlines.
3	<p data-bbox="521 1010 732 1045">After the meeting</p> <p data-bbox="521 1094 1292 1125">The trainer's job is not complete until they have done the following.</p> <ul data-bbox="542 1178 1398 1346" style="list-style-type: none"> <li data-bbox="542 1178 1000 1209">• Evaluated the results of the meeting/training. <li data-bbox="542 1213 1398 1276">• Prepared and distributed a summary of the meeting. This should include all action items identified. <li data-bbox="542 1281 824 1312">• Take any action agreed to. <li data-bbox="542 1316 850 1346">• Follow-up on all action items.

Procedure Manuals

Keep procedure manuals updated

Procedure manuals are essential tools in apartment management and should be updated on a continuing basis. Procedures change regularly as your company increases or decreases in size, property ownership changes and as laws and local codes change. When procedures change, the manuals should be updated.

Standard operating procedure manuals

Even the smallest company should have a standard operating procedures manual. Larger companies often expand materials and provide a company "library of manuals".

Manuals for purchase

Smaller companies have purchased generic apartment procedure manuals on computer disks and customized them to suit their needs. It is the best of both worlds...professionally written materials, on disk, already legally correct, ready to be customized.

Continued on next page

Procedure Manuals, Continued

Topics covered in manuals

Regardless of the size of your company or the number of manuals, specific subjects should be covered. Consistent and legally correct treatment of prospects, applicants, residents, visitors, and employees cannot be overemphasized.

Manuals should include information on:

- advertising and marketing
 - leasing
 - rent collection and eviction
 - resident retention and administration
 - maintenance
 - office procedures
 - personnel and payroll, and
 - safety
-

Reviewing and revising policies and procedures

Every policy and procedure should be reviewed and, if necessary, revised to be nondiscriminatory. Two areas of discrimination that should be considered the “litmus test” for every policy and/or procedure in the company are the difference in treatment or impact. Think about these a moment.

- Treatment. Emphasize in your written materials the fair treatment of all people. Use nondiscriminatory language in instructions, guidelines, forms, newsletters, notices, etc.
 - Impact. The old saying “actions speak louder than words” has never been more true. If the impact of a policy or procedure affects members of a protected class more harshly or excludes them, it is discrimination. Make sure that only valid business reasons are used when designing policies and procedures.
-

Access to manuals

All onsite employees should have ready access to all procedure manuals. The manuals should be user friendly and easy to understand. Use the manuals when training new employees and in planning subjects to discuss in staff meetings.

Involuntary Termination

Overview

Discharging an employee should be a decision that is carefully planned, even where there are reasons for immediate dismissal, such as theft, assault, or other serious infractions. In most terminations, based on progressive misconduct or non-performance, there should be a “paper trail” documenting the circumstances leading to the decision to terminate an individual.

Questions to consider before terminating an employee

Before terminating an employee, whether for a single incident or after prior counseling, carefully consider the following questions.

- Is the reason for discharge job-related?
 - Is the reason for discharge consistent with the company's policy and practice?
 - Other than cases of serious misconduct warranting immediate termination, does the record show the employee was given fair notice of what was expected of them, and an adequate opportunity to correct the perceived problem in performance or conduct? If not, there may be good reason to give a final warning and another chance to the employee.
 - Have the progressive steps from counseling to discharge been met?
 - Are you sure of the facts behind the proposed discharge, and are they supported by hard evidence rather than hearsay and speculation?
 - Have you been procedurally fair, i.e., have you confronted the employee with the reason you are considering discharge or discipline, afforded the employee fair opportunity to respond or explain, and to give their side of the story, before you make and announce your decision? Is this step accurately and adequately documented?
 - Has the employee made any claim of employer wrongdoing? If so, don't ignore the claim. Get the employee's story and investigate the claim. The employee may be obligated to cooperate with any reasonable investigation.
 - Has the proposed decision been reviewed objectively by someone other than the immediate supervisor to assure adequacy of the basis for discharge, consistency of approach, and sufficiency of documentation?
 - Is documentation of the incidents and misconduct proper and adequate? Will it support this termination?
-

Continued on next page

Involuntary Termination, Continued

Questions to consider before terminating an employee, (continued)

- Is this termination retaliatory? Is there any indication that it might be considered a termination in retaliation for an employee's whistle blowing, workplace injury claim, complaining about a manager's actions, or complaints about employee safety? Even if the termination is not so motivated, are there any facts or circumstances surrounding the termination that makes it appear retaliatory such as a relatively recent complaint?
- Has the employee's privacy been invaded? To accomplish the termination, is it necessary to invade the employee's privacy? For example, have you searched an employee's locked desk or based your termination decision on the employee's personal life, or his life outside of work?
- Is there a pending governmental investigation or complainant? Has the employee recently filed a complaint with the Equal Employment Opportunity Commission or another federal or state agency?
- Is the employee a member of a protected class, pregnant, a union activist, or a member of any other protected group?
- Is there any argument that the discharge was because the employee refused to participate in an illegal act or an act that may be considered against public policy?
- Does the employee live onsite? Do you anticipate a problem with the employee vacating the apartment as agreed in the Employee Lease Agreement Addendum or employment agreement, or expect retaliation by damaging the premises?
- Is the employee long term? Terminating long-term employees should automatically raise a red flag. Courts and juries are likely to ask why you didn't take action to terminate a long-term employee sooner if you claim that the employee was not performing adequately. The mere fact that an employee has longevity does not mean they can never be discharged—but it does mean you should have substantial documentation to support the discharge.
- Have company policies been followed?
- Is this employee particularly sensitive in some area so that your conduct is likely to upset the employee more than it would another person?
- What is the timing of the termination? Is it near in time to suspicious events, for example, shortly after the employee's recovery of worker's compensation benefits?
- Are you being honest about the reasons for termination? Are you prepared to tell the employee the real reason for termination? This is no time for face-saving for the employee. Employees should be told the real reason, a reason which you can substantiate with documentation and other evidence.
- Is there any indication of extreme or outrageous circumstances? This is especially problematic where there was an altercation between the employee and his supervisor.

Continued on next page

Involuntary Termination, Continued

Tips for a successful termination process

The following tips will help you set up a successful termination process.

- Know precisely why the employee is being dismissed and be able to articulate the reason clearly (again, making sure the reasons are non-discriminatory and included on the termination notice).
- Set a private appointment somewhere in a private office to ensure control and privacy. Under no circumstances should a dismissal be done on the telephone or in front of other people. Have a witness present.
- Although there is never a good time to dismiss, the best might be early Tuesday or Wednesday, which is preferable to 5:00 on Friday afternoon.
- How to conduct the meeting is to keep it brief, get the bad news across in the first sentence, and remain focused.
- Let the dismissed employee discuss his feelings without interruption; yet do not relinquish control of the meeting.
- Do not get angry or argue with the employee.
- If you anticipate an angry or violent response, all the more reason to have a neutral third party person (preferably your supervisor) attend the termination meeting.
- Have the final check, including any benefits, vacation, or severance and severance agreement prepared in advance if possible.
- If the employee lives onsite, review the Employee Lease Agreement Addendum requirements for vacating the apartment with the employee.
- Be sure the employee is clear on benefits such as group insurance continuation, pension plan electives, etc.
- Offer professional assistance, such as a counselor or an out-placement service, if appropriate.
- Assist the employee in leaving the property, and offer to let them gather personal belongings at the end of the day when everyone has left, or at another time. Assist them in avoiding embarrassment.
- While employees may respond with shock and anger, it rarely reaches the violence level anticipated or feared by managers.
- After the termination, avoid discussions with other employees regarding the change. Be respectful of the employee; if necessary, briefly inform staff that the employee has left the company.

Continued on next page

Involuntary Termination, Continued

Wrongful termination claims

If you have terminated an employee and they claim wrongful termination, harassment or discrimination, investigate their complaint and respond to the ex-employee on the results.

One legal case after another illustrates a very important precedent:

Do not wait until you have been notified of legal action to investigate. Start the investigation as soon as the complaint has been made. A case can be lost before it begins simply because the employer failed to listen to and investigate an employee's complaint. The courts look for and expect the employer to make a reasonable, appropriate, and timely response to an employee complaint.

Get Advance Assistance

For any termination that seems like it might be difficult, could lead to legal issues or where you just feel as if you would benefit from additional counsel, contact your employment law attorney in advance of the termination or as part of the disciplinary process.

Exit Interviews

Purpose of exit interview

There are three purposes for an exit interview:

- for voluntary terminations, to determine what steps the company can make to prevent further loss of employees
 - to determine where the employee or management went wrong if the termination is involuntary, and
 - to give the employee an opportunity to express their perspective on why they are leaving.
-

Responsibility

The exit interview gives the employer an opportunity to take the sting out of the termination and “defuse” an angry employee. An employee who feels that someone was willing to listen to their point of view may be less inclined to pursue legal action.

Tips for a successful exit interview

The following tips will help you set up a successful exit interview.

- It is very important for you to be prepared.
 - The employee’s file should be reviewed before the interview, and should include all performance reviews and disciplinary procedures.
-

Reference: See the Toolbox for a sample Exit Interview Guide.

Timeliness

The exit interview should be scheduled at the time of the termination. This lets the employee know that they will have time to think about the termination and provide a response. An angry employee may accept the termination better if they know an exit interview will be conducted.

Who conducts the exit interview?

In most cases, someone other than the individual handling the termination should conduct the exit interview. If an employee is leaving because of this person, a third party interviewer will make it easier for an employee to discuss the conflict.

Involuntary terminations

Although some employers may feel it is redundant, it is a good idea to conduct an exit interview (possibly by mail) for involuntary terminations, except in the instance of extraordinary misconduct such as stealing, selling drugs, or violence toward another employee.

Continued on next page

Exit Interviews, Continued

Involuntary terminations, (continued)

Below are some of the reasons for conducting an exit interview for involuntary termination.

- To discover an unknown cause (which may prevent a future recurrence).
- To learn of any problems that the employee may have had with the company that may be corrected.
- To learn of any misunderstanding between the employee and their supervisor to avoid future situations.

The objective during the first part of the interview should be to make the employee comfortable and willing to talk. If the termination notice has a section for an employee to comment on his termination, the exit interview should not be necessary.

Sample Interview Evaluation Form

Name of Applicant: _____

Position Desired: _____

Rate each applicant's qualifications based solely on the job description of the current job opening. Check the appropriate column and add any comments you wish to make.

- 1 – Does not meet requirements for the position
- 2 – Meets some of the requirements for the position
- 3 – Meets requirements for the position
- 4 – Exceeds requirements for the position

CATEGORY	1	2	3	4	COMMENTS
Work History					
Technical Ability					
Education					
Job Stability					
Communication Skills (Verbal response, body language)					
Appearance (Cleanliness, neatness, grooming)					
Advancement Potential					
Overall Evaluation					

Would you recommend for hire? Yes No If no, why? _

Recommended Position: _____

Candidate accepted/rejected offer: _____

Starting Salary: _____ Starting Date: _____

Company/Location: _____

Interviewed By: ___ Date: _____

Sample Exit Interview Guide

Employee Name _____

Property/Position _____

Last Day Worked/Date of Interview _____

What prompted your decision to leave? _____

If you could have changed any one thing about your job, what would it have been? _____

Would you consider working for us again? Why or why not?

How would you rate these items:

	<u>Excellent</u>	<u>Satisfactory</u>	<u>Unsatisfactory</u>
Compensation	_____	_____	_____
Benefits	_____	_____	_____
Training	_____	_____	_____
Supervisory Support	_____	_____	_____
Working Conditions	_____	_____	_____
Safety	_____	_____	_____
Upper Management	_____	_____	_____
Job Challenge	_____	_____	_____
Job Security	_____	_____	_____
Location	_____	_____	_____
Policies & Procedures	_____	_____	_____
Advancement Opportunities	_____	_____	_____
Cooperation of Co-Workers	_____	_____	_____

Additional Comments: _____

Interviewer's Signature & Date

Interviewee's Signature & Date

Job Description—Manager

Reports To: Property Supervisor

The purpose of this job description is to communicate the responsibilities and duties associated with the position of MANAGER. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties may not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

Our company emphasizes a TEAM APPROACH and expects every person to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review these duties, skills and physical requirements closely and that you understand that, by signing the Job Description Acknowledgement, you are verifying that you can perform all the duties, have the skills and possess the physical abilities that are necessary to perform the job as described.

JOB SUMMARY

The MANAGER is fully accountable for all property operations. The purpose of the MANAGER is to effectively manage and coordinate persons, activities and available resources in order to accomplish property objectives as set forth by the property supervisor and property owner. These objectives will include maximizing occupancy levels and property values. In addition, the MANAGER will train the assistant manager to assume all duties of /the MANAGER in the event of the MANAGER'S absence.

WAGE/HOUR STATUS

Exempt (ineligible for overtime)

DUTIES AND RESPONSIBILITIES

Conduct all business in accordance with company policies and procedures, Fair Housing, Americans with Disabilities Act, Fair Credit Reporting Act, and all other laws pertaining to apartments.

Financial

- In conjunction with the property supervisor, the manager will assist in formulation of budgets for each upcoming calendar year. The manager is responsible for staying within the established budget guidelines throughout the year.
- Ensures that all rents are collected when due, and posted in a timely manner. Makes sure that all bank deposits are made immediately and deposits are reported to the corporate office on a daily basis.
- Performs evictions, utility cut-offs and landlord liens as required on delinquent rents.
- Provides constant vendor/contractor communications concerning work scheduling, billings, vendor relations and certificates of insurance. Manager is responsible for approving and submitting all invoices to corporate office for payment.

Personnel

- Hires, trains, motivates, supervises, and terminates all on-site staff in order to achieve operational goals of assigned property. This includes new employee indoctrination, annual performance reviews, review and approval of timesheets, instructing and advising on-site staff of employee procedures and guidelines.
- Conducts on-going training with office staff; e.g., leasing paperwork, workplace safety, and any other type of training that may be needed on a daily basis.

Administrative/Office

- Ensures that lease files are complete and that completion of leases is being executed properly.
- Responsible for office opening on schedule, condition of office and model apartments.
- Attends scheduled corporate management meetings, usually held on a quarterly basis at the corporate office.
- Maintains records on all aspects of management activity on a daily, weekly and monthly basis. Submits required reports to corporate office on a weekly and monthly basis.

Resident Relations

- Maintains positive customer service attitude.
- Makes periodic inspections with residents of move-in/move-outs.
- Reviews all notices to vacate to determine the cause of the move-out.
- Initiates and implements policies/procedures to maintain resident communications; e.g., complaints, service requests, etc.

Maintenance

- Physically walks and inspects property on a regular basis; Verifies condition of vacant apartments.
- Updates board indicating vacancy status on a daily basis. Coordinates with maintenance and make-ready staff to ensure timely recondition of apartments after move-out.
- Monitors and schedules all maintenance activities.

Marketing/Leasing

- Conducts market surveys monthly and provides trend report information. Shops competition and is aware of neighborhood market conditions.
- Welcomes and shows property to prospective new residents. Also, handles incoming phone calls from prospective new residents and completes appropriate paperwork.
- Maintains awareness of market/industry conditions and trends via trade publications, professional organizations, etc.

Safety

- Reports all liability and property incidents to the corporate office immediately. Ensures that all workers' compensation claims are reported and proper paperwork is completed.
- Manager completes any pertinent safety checklists with maintenance staff.

General

- Performs any additional duties or tasks as assigned by the property supervisor.

QUALIFICATIONS

Position requires at least 3 years of experience in on-site property management; 1 year of experience as manager. Must have background in supervision and successful track record of accomplishments.

Computer Skills:

Word Processing On-Site Rental System

Office Equipment:

Calculator, Typewriter, Copy Machine, Fax Machine, Telephone, Key Machine.

Work Hours:

Minimum of 40 hours per week. Must be available evenings, nights and weekends for staffing needs and emergencies.

EDUCATION/TRAINING

- High School diploma or equivalent required
- Certified Apartment Property Supervisor (CAPS/ preferred

PHYSICAL REQUIREMENTS

- Stand and walk or sit alternatively depending on specific needs of the day. Estimate 60% of time is spent on feet and 40% sitting at desk.

- Have occasional need (33% to 66% of the time/ to perform the following physical activities:

Bend/Stoop/Squat	Pick up litter, filing
Climb Stairs	Inspect and show property
Push or Pull	Inspect and show property, open and close doors
Reach Above Shoulder	Inspect property, store/retrieve supplies

- Have frequent need (33% to 66% of the time/ to perform standing and walking activities related to inspecting and presenting property.

- Constant need (66% to 100% of time/ to perform the following physical activities:

Writing/Typing	Corporate, resident communications
Grasping/Turning Finger Dexterity	Telephone, doorknob use Operation of office equipment

Lifting/Carrying (paperwork, deliveries, files, miscellaneous/:

Over 25 lbs.	Rare need (less than 1% of the time/
20 lbs. – 25 lbs.	Occasional need (1% to 33% of the time/
Less than 20 lbs.	Frequent need (33% to 66% of the time/
Under 10 lbs.	Constant need (66% to 100% of the time/

VISION REQUIREMENTS

- Constant need (66% to 100% of the time/ to complete forms, read and review reports and a wide variety of correspondence, view computer screen. Frequent need to see small detail.
- Frequent need (33% to 66% of the time/ to see things clearly beyond arm's reach (inspecting property, neighborhood surveys/.
- Must be able to determine colors properly because of decorating, design, paint colors, etc.

HEARING REQUIREMENTS

- Constant need (66% to 100% of the time/ to communicate over telephone and in person with property owners, corporate and resident management, vendors and residents.

SPEAKING REQUIREMENTS

- Constant need (66% to 100% of the time/ to communicate over telephone and in person.

MENTAL/EMOTIONAL REQUIREMENTS

- Must be able to work in a fast-paced and customer service-oriented environment.
- Performs duties under pressure and meet deadlines in a timely manner.
- Works as part of a team, as well as complete assignments independently.
- Takes instructions from supervisors.
- Exercises problem-solving skills.
- Interacts with co-workers, supervisors, guests and the public in a professional and pleasant manner.

DRIVING REQUIREMENTS

- Frequent need (20% to 25% of the time/ to utilize personal transportation to inspect apartment property and surrounding neighborhood, make trips to the bank and also visit the corporate office.
- Must have valid driver's license and automobile insurance.

WORKING ENVIRONMENT

- Indoors (66% to 100% of the time/; frequently outdoors, all conditions (33% to 66% of the time).
- Occasional exposure to caustics, solvents, oils, fumes, flammables, pesticides, etc. (less than 10%).

REASONING DEVELOPMENT

- HIGH. Must be able to apply principles of logical thinking to define problems, collect pertinent data, establish facts, draw valid conclusions and initiate appropriate course of action. Must effectively convey ideas, images and goals to a diverse group of personalities.

SAFETY RESPONSIBILITIES

- Learns and complies with all company safety rules.
- Uses appropriate safety equipment at all times.
- Immediately reports all unsafe conditions to supervisors.
- Must be familiar with all safety features or equipment, machinery, or materials encompassed by job duties.
- Must check with supervisor if there is a question as to the safe procedure to be used for any job function.

SKILL TESTING

Manager must complete the following tests:

- Spelling (no more than 5 wrong/)
- Math (no more than 3 wrong/)

ADDITIONAL REQUIREMENTS

- Employees must fulfill the performance standards of this position and comply with policies, rules and procedures of the company, including those set out in the Employee Handbook, or otherwise communicated (verbally or in writing/ to employees.
- This job description is intended to describe the general nature and work responsibilities of the position. This job description and the duties of this position are subject to change, modification and addition as deemed necessary by the company. Employees are required to comply with supervisory instructions and perform other job duties, responsibilities and assignments requested by supervisors, managers or other company officials.
- This job description does not constitute an employment contract between the company and any employee.
- The job responsibilities of this position may include cross-training in other functions or positions to ensure satisfactory operation of the department or work area.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge that I have received a copy of the manager job description and understand that it is my responsibility to read and understand it. I understand that this job description may be used as a tool to evaluate the performance of my duties. If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Signature

Date

Printed Name

Job Description—Assistant Manager

Reports To: Manager

The purpose of this job description is to communicate the responsibilities and duties associated with the position of ASSISTANT MANAGER. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties may not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review these duties, skills and physical requirements closely and that you understand that by signing the Job Description Acknowledgement, you are verifying that you can perform all the duties, have the skills and possess the physical abilities that are necessary to perform the job as described.

JOB SUMMARY

The ASSISTANT MANAGER is to assist the manager in effectively managing the assigned property. In the manager's absence, the ASSISTANT MANAGER will assume all responsibilities associated with accomplishing property objectives as set forth by the property supervisor and the property owner. In addition, the ASSISTANT MANAGER is directly responsible for maintaining daily, weekly, and monthly reports including accurate reporting of rents and deposits received.

WAGE/HOUR STATUS

Exempt (ineligible for overtime)

DUTIES AND RESPONSIBILITIES

Conducts all business in accordance with company policies and procedures, Fair Housing, Americans with Disabilities Act, Fair Credit Reporting Act, and all other laws pertaining to apartments.

Income Collection

- Maintains accurate resident records. Updates on a daily basis all rents, deposits and application fees received from residents. Issue appropriate notices when necessary (e.g., late payments, eviction notices, returned check memos/.
- Deposits all receipts prior to bank close each day.

Resident Relations

- Maintains positive customer relations attitude.
- Physically inspects property when on grounds, picks up litter and reports any service needs to maintenance staff. Will also inspect move-outs and vacancies when requested.

Marketing

- Must be knowledgeable of all phases of leasing and resident retention.
- Works with lease renewals each month.
- Greets prospective clients, shows community and performs leasing duties as needed.
- Answers and handles incoming phone calls from prospective new residents, current residents, vendor/suppliers, etc.
- Maintains awareness of local market conditions and trends. Contributes ideas to manager for marketing community and improving resident satisfaction.

Administrative

- Updates required reports concerning move-out notices, activity, etc., on a daily basis and provides information to the manager.
- Organizes and files all applicable reports, leases and paperwork.
- Proofreads all lease paperwork and processes move-ins and move-outs.
- Processes all security deposit move-out reports.
- Accepts service requests from residents and routes to maintenance for prompt processing. Conducts service follow-up with resident when work is completed.

General

- Performs any additional duties assigned by manager or property supervisor.

QUALIFICATIONS

Position requires at least 1 year experience in property management. Must have basic computer knowledge and type 30 wpm.

Computer Skills: Word Processing/On-Site Rental System

Office Equipment: Calculator, Typewriter, Copy Machine, Fax Machine, Telephone

Work Hours: Minimum 40 hours per week with flexible work week.

EDUCATION/TRAINING

- High School diploma or equivalent preferred

PHYSICAL REQUIREMENTS

- Stand and walk or sit alternatively depending on specific needs of the day. Estimate 50% of time is spent on feet and 50% sitting at desk.

- Have occasional need (1% to 33% of the time) to perform the following physical activities:

Bend/Stoop/Squat	Pick up litter, filing
Climb Stairs	Inspect and show property
Push or Pull	Inspect and show property, open and close doors
Reach Above Shoulder	Inspect property, store/retrieve supplies

- Have frequent need (33% to 66% of the time) to perform standing and walking activities related to inspecting and presenting property.

- Constant need (66% to 100% of time) to perform the following physical activities:

Writing/Typing	Corporate, inter-office, resident communications
Grasping/Turning	Telephone, doorknob use
Finger Dexterity	Operation of office equipment

- Lifting/Carrying (paperwork, deliveries, files, miscellaneous):

Over 25 lbs.	Rare need (less than 1% of the time)
20 lbs. – 25 lbs.	Occasional need (1% to 33% of the time)
Less than 20 lbs.	Frequent need (33% to 66% of the time)
Under 10 lbs.	Constant need (66% to 100% of the time)

VISION REQUIREMENTS

- Constant need (66% to 100% of the time/ to complete forms, read and review reports, wide variety of correspondence, view computer screen. Frequent need to see small detail and view computer screens.
- Frequent need (33% to 66% of the time/ to see things clearly beyond arm's reach (inspecting property, neighborhood surveys/.

HEARING REQUIREMENTS

- Constant need (66% to 100% of the time/ to communicate over telephone and in person with vendors, corporate office staff, and residents.

SPEAKING REQUIREMENTS

- Constant need (66% to 100% of the time/ to communicate over telephone and in person.

MENTAL/EMOTIONAL REQUIREMENTS

- Must be able to work in a fast-paced and customer service-oriented environment.
- Performs duties under pressure and meets deadlines in a timely manner.
- Works as part of a team, as well as completes assignments independently.
- Takes instructions from supervisors.
- Exercises problem-solving skills.
- Interacts with co-workers, supervisors, guests and the public in a professional and pleasant manner.

DRIVING/TRAVELING REQUIREMENTS

- Frequent need (33% to 66% of the time/ to utilize personal transportation to inspect apartment property and surrounding neighborhood, make trips to the bank and also visit the corporate office.
- Must have valid driver's license and automobile insurance.

WORKING ENVIRONMENT

- Indoors (66% to 100% of the time/; frequently outdoors, all conditions (33% to 66% of the time/.
- Occasional exposure to caustics, solvents, oils, fumes, flammables, pesticides, etc. (less than 10%/.

REASONING DEVELOPMENT

- HIGH. Must be able to apply principles of logical thinking to define problems, collect pertinent data, establish facts, draw valid conclusions and initiate appropriate course of action. Must effectively convey ideas, images and goals to a diverse group of personalities.

SAFETY RESPONSIBILITIES

- Must learn and comply with all company safety rules.
- Must use appropriate safety equipment at all times.
- Must immediately report all unsafe conditions to supervisors.
- Must be familiar with all safety features of equipment, machinery, or materials encompassed by job duties; and must check with supervisor if there is a question as to the safe procedure to be used for any job function.

SKILL TESTING

Assistant Manager must complete the following tests:

- Spelling (no more than 5 wrong/
- Math (no more than 4 wrong/

ADDITIONAL REQUIREMENTS

- Employees must fulfill the performance standards of this position and comply with policies, rules and procedures of the company, including those set out in the Employee Handbook, or otherwise communicated (verbally or in writing/ to employees.
- This job description is intended to describe the general nature and work responsibilities of the position. This job description and the duties of this position are subject to change, modification and addition as deemed necessary by the company. Employees are required to comply with supervisory instructions and perform other job duties, responsibilities and assignments requested by supervisors, managers or other company officials.
- This job description does not constitute an employment contract between the company and any employee.
- The job responsibilities of this position may include cross-training in other functions or positions to ensure satisfactory operation of the department or work area.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge that I have received a copy of the assistant manager job description and understand that it is my responsibility to read and understand it. I understand that this job description may be used as a tool to evaluate the performance of my duties. If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Signature

Date

Printed Name

Job Description—Leasing Consultant

Reports To: Manager

The purpose of this job description is to communicate the responsibilities and duties associated with the position of LEASING CONSULTANT. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties might not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review closely these duties, skills and physical requirements and that you understand that by signing the Job Description Acknowledgement, you are verifying that you can perform all the duties, have the skills and possess the physical abilities necessary to perform the job as described.

JOB SUMMARY:

The LEASING CONSULTANT is the property's sales representative whose primary duties are to greet prospects, to present professionally the features and benefits of their assigned community and properly secure lease agreements from qualified persons. A LEASING CONSULTANT is very service oriented and strives to make current residents feel welcome and comfortable in their community. The LEASING CONSULTANT will contact a person of authority should any situation warrant an action or decision not included in his or her duties and responsibilities.

WAGE/HOUR STATUS

Exempt (ineligible for overtime/

DUTIES AND RESPONSIBILITIES

Conducts all business in accordance with company policies and procedures, Fair Housing, Americans with Disabilities Act, Fair Credit Reporting Act, and all other laws pertaining to apartments.

Marketing/Leasing

- Maintains a professional, yet friendly, atmosphere in the leasing office and other areas where prospective residents and residents meet.
- Inspects models and "market ready" vacancies daily to ensure cleanliness.
- Answers incoming phone calls and handles each call accordingly, whether it is a prospect call, irate resident, service request, etc. Transfers calls to assistant manager or manager when appropriate.
- Greets prospective residents, qualifies, determines needs and preferences, professionally presents community and specific apartments while communicating features and benefits.
- Maintains awareness of local market conditions and trends. Contributes ideas to the manager for marketing property and for improving resident satisfaction.

Administrative

- Correctly completes all lease applications, assists with application verification and notifies prospective residents of results. Types miscellaneous resident communication as needed.
- Completes all lease paperwork including related addenda and accepts rents and deposits.
- Completes Guest Card information form on all prospects, sends thank-you notes and performs follow-up.
- Physically inspects property when on grounds, picks up litter and reports any service needs to maintenance staff. Inspects move-outs and vacancies.
- Inventories office supplies on periodic basis. Reports needs to manager.
- Organizes and files appropriate reports, leases and paperwork.
- Attends company meetings when requested.
- Assists manager and assistant manager in preparation of daily and weekly reports, resident communications, move-out inventory, market surveys, etc.

General

- Performs any additional duties assigned by assistant manager, manager or supervisor.

QUALIFICATIONS

Position requires good leasing and closing skills, and the person must be able to type 30 WPM and be organized.

Computer Skills: Word Processing

Office Equipment: Copy Machine, Typewriter, Telephone, Fax Machine

Work Hours: 20-40 hours per week depending on whether a full or part-time employee. Employee will be required to work a flexible work week.

EDUCATION/TRAINING

- National Apartment Leasing Professional (NALP) desired

PHYSICAL REQUIREMENTS

- Stand and walk or sit alternatively depending on specific needs of the day. Estimate 70% of time is spent on feet and 30% sitting at desk.

- Have occasional need (66% to 100% of the time) to perform the following physical activities:

Bend/Stoop/Squat	Pick up litter, filing
Climb Stairs	Inspect and show community
Push or Pull	Inspect and show community, open and close doors
Reach Above Shoulder	Inspect community, store/retrieve supplies

- Have constant need (66% to 100% of the time) to perform standing and walking activities related to inspecting and presenting property.

- Constant need (66% to 100% of time) to perform the following physical activities:

Writing/Typing	Corporate, inter-office, resident communications
Grasping/Turning	Telephone, doorknob use
Finger Dexterity	Typing, operation of office equipment

- Lifting/Carrying (paperwork, deliveries, files, miscellaneous):

Over 25 lbs.	Rare need (less than 1% of the time)
20 lbs. – 25 lbs.	Occasional need (1% to 33% of the time)
Less than 20 lbs.	Frequent need (33% to 66% of the time)
Under 10 lbs.	Constant need (66% to 100% of the time)

VISION REQUIREMENTS

- Constant need (66% to 100% of the time) to complete forms, read and review reports, answer a wide variety of correspondence, view computer screen. Frequent need to see small detail.
- Constant need (66% to 100% of the time) to see things clearly beyond arm's reach; e.g. inspecting and showing community.

HEARING REQUIREMENTS

- Constant need (66% to 100% of the time) to communicate over telephone and in person with prospects, residents, vendors and corporate and resident staff.

SPEAKING REQUIREMENTS

- Constant need (66% to 100% of the time) to communicate over telephone and in person with prospects, residents, vendors and corporate and resident staff.

MENTAL/EMOTIONAL REQUIREMENTS

- Must be able to work in a fast-paced and customer service-oriented environment.
- Performs duties under pressure and meets deadlines in a timely manner.
- Works as part of a team, as well as completes assignments independently.
- Takes instructions from supervisors.
- Exercises problem-solving skills.
- Interacts with co-workers, supervisors, guests and the public in a professional and pleasant manner.

DRIVING/TRAVELING REQUIREMENTS

- Occasional need (1% to 33% of the time) to utilize personal transportation to inspect apartment property and surrounding neighborhood, make trips to the bank and also visit the corporate office.
- Must have valid driver's license and automobile insurance.

WORKING ENVIRONMENT

- Indoors (66% to 100% of the time); frequently outdoors, all conditions (33% to 66% of the time).
- Occasional exposure (1% to 33% of time) to paint fumes, solvents, adhesives, etc.

REASONING DEVELOPMENT

- Moderate. Must be able to apply principals of logical thinking to a variety of practical situations and accurately follow standardized procedures that may occasionally call for minor deviations. Needs to think rationally beyond a specific set of instructions.

SAFETY RESPONSIBILITIES

- Learns and complies with all company safety rules.
- Uses appropriate safety equipment at all times.
- Immediately reports all unsafe conditions to supervisors.
- Must be familiar with all safety features or equipment, machinery, or materials encompassed by job duties.
- Must check with supervisor if there is a question as to the safe procedure to be used for any job function.

SKILL TESTING

Leasing Consultant must complete the following tests:

- Spelling (no more than seven wrong)
- Math (no more than four wrong)

ADDITIONAL REQUIREMENTS

- Employees must fulfill the performance standards of this position and comply with policies, rules and procedures of the company, including those set out in the Employee Handbook, or otherwise communicated (verbally or in writing) to employees.
- This job description is intended to describe the general nature and work responsibilities of the position. This job description and the duties of this position are subject to change, modification and addition as deemed necessary by the company. Employees are required to comply with supervisory instructions and perform other job duties, responsibilities and assignments requested by supervisors, managers or other company officials.
- This job description does not constitute an employment contract between the company and any employee.
- The job responsibilities of this position may include cross-training in other functions or positions to ensure satisfactory operation of the department or work area.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge that I have received a copy of the leasing consultant job description and understand that it is my responsibility to read and understand it. I understand that this job description may be used as a tool to evaluate the performance of my duties. If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Signature

Date

Printed Name

Job Description—Senior Maintenance Technician

Reports To: Manager

The purpose of this job description is to communicate the responsibilities and duties associated with the position of SENIOR MAINTENANCE TECHNICIAN. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties may not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review these duties, skills and physical requirements closely and that you understand that by signing the Job Description Acknowledgement, you are verifying that you can perform all the duties, have the skills and possess the physical abilities that are necessary to perform the job as described.

JOB SUMMARY

The SENIOR MAINTENANCE TECHNICIAN is responsible for maintaining the physical integrity of the community at all times. This involves ensuring a safe and secure living environment for residents, visitors and staff. It is the SENIOR MAINTENANCE TECHNICIAN'S duty to anticipate, identify and correct any and all problems involving the property and to implement procedures that will prevent such problems. An effective program of maintenance is essential in order to:

- Maintain a safe environment
- Cultivate resident satisfaction
- Protect the investment of the apartment property owner

WAGE/HOUR STATUS

Exempt (ineligible for overtime)

DUTIES AND RESPONSIBILITIES

Conducts all business in accordance with company policies and procedures, state and federal laws; e.g., OSHA, ADA, Fair Housing, etc.

Resident Service

- Performs maintenance tasks personally or delegates to assistants. Oversees and occasionally inspects work performed by assistants.
- Institutes and manages system for handling resident service requests. Corrects situations within 24 hours when possible.
- Schedules maintenance personnel in conjunction with manager so that maintenance is available for emergency purposes, 24 hours a day, seven days a week.

Preventive Maintenance/Safety

- Conducts regularly scheduled safety meetings with entire staff; maintains and communicates HAZCOM standards. Keeps MSDS sheets current and readily accessible. Maintains thorough knowledge of pertinent laws and EPA and OSHA regulations governing property storage and management of hazardous materials, including solvents, flammables, caustics and refrigerants.
- Must be aware of the condition of physical property throughout the community and immediately correct unsafe conditions; e.g., broken gates leading to the pool, broken steps, open holes, broken/burned out exterior lights.
- Maintains accurate records regarding preventive maintenance, service requests (received and completed/, expenditures, apartment make-ready status, work-in-progress, etc.
- Schedules and performs minor and routine maintenance on all appropriate equipment on a regular basis. Inspects and maintains all tools in excellent condition.
- Indoctrinates and assists in development of all subordinate maintenance staff. Instills a "safety first" attitude not only with maintenance technicians but with all staff.
- Instructs staff on proper use and guidelines for wearing safety items.

General

- Diagnoses and performs minor or routine maintenance or repair involving the following on a daily basis.
 - Electrical and plumbing (including water lines)
 - A/C and heating systems
 - Appliances (when applicable)
 - Water irrigation systems
 - Stairs, gates, fences, patios, railings
 - Tile, carpet, flooring
 - Roofing, gutters, fasteners
 - Interior/exterior lights
 - Fireplaces, ceiling fans
 - Gas features and appliances (where applicable)
 - Shutters, doors, cabinets, windows, sliding glass doors
 - Boiler, gas and electric
 - Door locks, PO boxes and locks
 - Security systems (where applicable)
 - Ceiling leaks
 - Walls
 - Pool areas, tile, hot tub/spa, pool furniture
- Ensures that all make-ready repairs and services are completed correctly and on schedule.
- Reports all major repairs and requisitions to manager prior to any expenditure of funds.
- Changes locks and makes keys.
- Removes and transfers heavy appliances and equipment from storage area to apartment (or vice versa/ as circumstances warrant. Assists in moving abandoned furniture, appliances, etc., to dumpster when necessary.
- Maintains adequate inventory of spare parts and maintenance materials to handle most common repairs and situations.
- Identifies all utility meter cut-offs, apartment and fixture cut-offs, sewer cleanouts and prepares maps indicating same.
- Performs work area clean-up and safety related duties.
- Ensures that storage areas remain locked when not in use.
- Assists in keeping grounds neat and free of litter. Rakes, sweeps, shovels as circumstances warrant.
- Performs any additional duties assigned by manager or property supervisor.

QUALIFICATIONS

Position requires at least 3 years of experience in property maintenance or equivalent field.

Equipment Requirement:

Required to wear back support belt, wear goggles when working with specific equipment, wear masks and gloves and other safety equipment as tasks dictate.

Work Hours:

Minimum of 40 hours per week. Weekends as circumstances warrant; on-call on a rotating basis and for emergencies.

Equipment/Machinery/Tools:

An employee in this position must be knowledgeable and skilled in the safe use and maintenance of the following tools:

Hand Tools	Various wrenches, hammer, grips, saws, sledgehammer, snips, posthole diggers, etc.
Power Tools	Wrenches, grinders, sanders, drills, saws, etc.
User-Moved Aids	Wheelbarrows, dollies, hand trucks, buckets, hoists, jacks, step ladders, full ladders, double ladders.
Mechanical Equip.	Motors, pumps, compressors, blowers, electric and hand power augers, etc.
Measuring Devices	Calipers, voltmeters, ohmmeters, testing meters, PH tests, gauges, etc.

EDUCATION/TRAINING

- Certified Apartment Maintenance Technician (CAMT) desired

PHYSICAL REQUIREMENTS

- Constant need (66% to 100% of the time) to be on feet.
- Have constant need (66% to 100% of the time) to perform the following physical activities:

Bend/Stoop/Squat	Perform routine maintenance/repairs, pick up tools and needed equipment
Climb Stairs	Service requests, make-ready needs for 2 nd and 3 rd floor apartments
Push or Pull	Move equipment, appliances, open and close doors, etc.
Reach Above Shoulder	Perform routine maintenance/repairs, stock and remove equipment, parts, etc.
Climb Ladders	Perform routine maintenance/repairs
Grasp/Grip/Turning	Handle tools and equipment, perform routine maintenance/repairs
Finger Dexterity	Handle tools and equipment, perform routine maintenance/repairs
Writing	Inventory maintenance, requisition requests, required maintenance reports.

Lifting/Carrying (supplies, replacement parts, ladders, etc.):

Over 150 lbs.	Rare need (less than 1% of the time)
75 lbs. – 150 lbs.	Occasional need (1% to 33% of the time)
25 lbs. – 75 lbs.	Frequent need (33% to 66% of the time)
1 – 25 lbs.	Constant need (66% to 100% of the time)

NOTE: Lifting and carrying of weights exceeding 50 lbs. is to be accomplished with assistance from one or more persons. Examples of heaviest items lifted include washer/dryers, refrigerators, A/C units, abandoned sofas, etc.

VISION REQUIREMENTS

- Constant need (66% to 100% of the time/ to document maintenance and complete forms, review manuals and operating instructions, read cautionary labels, respond to written instruction from staff and residents. Constant need to see small detail when performing routine maintenance duties.
- Frequent need (33% to 60% of the time/ to see things clearly beyond arm's reach (oversee assistants, observe problems throughout the property/.

HEARING REQUIREMENTS

- Constant need (66% to 100% of the time) to communicate with assistants, resident staff, vendors and residents. Must use listening skills to diagnose needed repairs, etc.

SPEAKING REQUIREMENTS

- Constant need (66% to 100% of the time) to verbally communicate with assistants, resident staff, vendors and residents.

MENTAL/EMOTIONAL REQUIREMENTS

- Must be able to work in a fast-paced and customer service-oriented environment.
- Performs duties under pressure and meets deadlines in a timely manner.
- Works as part of a team, as well as completes assignments independently.
- Takes instructions from supervisors.
- Exercises problem-solving skills.
- Interacts with co-workers, supervisors, guests and the public in a professional and pleasant manner.

DRIVING/TRAVELING REQUIREMENTS

- Frequent need (33% to 66% of the time) to utilize personal transportation to pick up replacement parts and supplies from vendors. Rotation "on call" status may occasionally require expedient travel to assigned property at moment's notice. Pick up and deliveries to the corporate office.
- Must have valid driver's license and automobile insurance coverage.

WORKING ENVIRONMENT

- Indoors (66% to 100% of the time). Frequently outdoors (33% to 66% of the time), all conditions, often for extended periods.
- Occasional exposure (1% to 33% of time) to paint fumes, solvents, adhesives, etc. Example: Apartments during/after make-ready.
- Frequent need (33% to 66% of the time) to work in awkward and confining positions.

REASONING DEVELOPMENT

- HIGH. Must be able to apply principles of logical thinking to define problems, collect pertinent data, establish facts, draw valid conclusions and initiate appropriate course of action. Must effectively convey ideas, images and goals to a diverse group of personalities.

SAFETY RESPONSIBILITIES

- Learns and complies with all company safety rules.
- Must use appropriate safety equipment at all times.
- Immediately reports all unsafe conditions to supervisors.
- Must be familiar with all safety features or equipment, machinery, or materials encompassed by job duties.
- Must check with supervisor if there is a question as to the safe procedure to be used for any job function.

ADDITIONAL REQUIREMENTS

- Employees must fulfill the performance standards of this position and comply with policies, rules and procedures of the company, including those set out in the Employee Handbook, or otherwise communicated (verbally or in writing/ to employees.
- This job description is intended to describe the general nature and work responsibilities of the position. This job description and the duties of this position are subject to change, modification and addition as deemed necessary by the company. Employees are required to comply with supervisory instructions and perform other job duties, responsibilities and assignments requested by supervisors, managers or other company officials.
- This job description does not constitute an employment contract between the company and any employee.
- The job responsibilities of this position may include cross-training in other functions or positions to ensure satisfactory operation of the department or work area.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge that I have received a copy of the senior maintenance technician job description and understand that it is my responsibility to read and understand it. I understand that this job description may be used as a tool to evaluate the performance of my duties. If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Signature

Date

Printed Name

Job Description—Assistant Maintenance Technician

Reports To: Manager

The purpose of this job description is to communicate the responsibilities and duties associated with the position of ASSISTANT MAINTENANCE TECHNICIAN. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties may not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review these duties, skills and physical requirements closely and that you understand that by signing the Job Description Acknowledgement, you are verifying that you can perform all the duties, have the skills and possess the physical abilities that are necessary to perform the job as described.

JOB SUMMARY

The ASSISTANT MAINTENANCE TECHNICIAN is to assist the senior maintenance technician in maintaining the physical integrity of the community. This involves ensuring a safe, secure, and comfortable living environment for residents, visitors and staff. The ASSISTANT MAINTENANCE TECHNICIAN will carry out assigned duties in a safe manner and other duties as requested by the senior maintenance technician. In the absence of the senior maintenance technician, the ASSISTANT MAINTENANCE TECHNICIAN will assume all maintenance responsibilities.

WAGE/HOUR STATUS

Exempt (ineligible for overtime)

DUTIES AND RESPONSIBILITIES

Conducts all business in accordance with company policies and procedures, state and federal laws; e.g., OSHA, ADA, Fair Housing, etc.

Preventive Maintenance/Safety

- Must be knowledgeable of pertinent laws and EPA and OSHA regulations governing proper storage and management of hazardous materials, including solvents, flammables, caustics and freon.
- Must be aware of the condition of apartment property throughout the community and immediately initiates action to correct unsafe conditions; e.g., broken gates leading to the pool, broken steps, open holes, broken/burned out exterior lights.
- Schedules and performs routine preventive maintenance on all appropriate equipment as directed by senior maintenance technician and manager. Inspects and maintains all tools in excellent condition.
- Must be aware of all utility meter cut-offs, apartment and fixture cut-offs, sewer cleanouts.
- Performs work area clean-up and safety related duties.
- Ensures that storage areas remain locked when not in use.

General

- Diagnoses and performs minor or routine maintenance or repair, as directed, involving the following on a daily basis:
 - Electrical and plumbing (including water lines/.
 - A/C and heating systems.
 - Appliances (when applicable/.
 - Water irrigation systems.
 - Stairs, gates, fences, patios, railings.
 - Tile, carpet, flooring.
 - Roofing, gutters, fasteners.
 - Interior/exterior lights.
 - Fireplaces, ceiling fans.
 - Gas fixtures and appliances (where applicable/.
 - Shutters, doors, cabinets, windows, sliding glass doors.
 - Boiler, gas and electric.
 - Door locks, P.O. boxes and locks.
 - Security systems (where applicable/.
 - Ceiling leaks.
 - Walls.
 - Pool areas, tile, hot tub/spa, pool furniture.
- Inspects and helps coordinate all needed make-ready repairs and services. Assists make-ready staff as required to meet deadlines.
- Reports all major repairs and need requisitions to senior maintenance technician and manager prior to any expenditure of funds.
- Changes locks and make keys.
- Removes and transfers heavy appliances and equipment from storage area to apartment (or vice versa/ as circumstances warrant. Assists in moving abandoned furniture, appliances, etc., to dumpster when necessary.
- Must be knowledgeable of inventory levels of spare parts and supplies and inform senior

maintenance technician of shortages.

- Assists in keeping grounds neat and free of litter. Rakes, sweeps, shovels as circumstances warrant.
- Performs any additional duties assigned by senior maintenance technician and manager.

QUALIFICATIONS

Position requires at least one year of experience in apartment maintenance.

Equipment Requirement:

Required to wear back support belt, wear goggles when working with specific equipment, wear masks and gloves and other safety equipment as tasks dictate.

Work Hours:

Minimum of 40 hours per week. Weekends as circumstances warrant; on-call on a rotating basis and for emergencies.

Equipment/Machinery/Tools:

An employee in this position must be knowledgeable and skilled in the safe use and maintenance of the following tools:

Hand Tools	Various wrenches, hammer, grips, saws, sledgehammer, snips, posthole diggers, etc.
Power Tools	Wrenches, grinders, sanders, drills, saws, etc.
User-Moved Aids	Wheelbarrows, dollies, hand trucks, buckets, hoists, jacks, step ladders, full ladders, double ladders.
Mechanical Equip.	Motors, pumps, compressors, blowers, electric and hand power augers, etc.
Measuring Devices	Calipers, voltmeters, ohmmeters, testing meters, PH tests, gauges, etc.

PHYSICAL REQUIREMENTS

- Constant need (66% to 100% of the time) to be on feet.
- Have constant need (66% to 100% of the time) to perform the following physical activities:

Bend/Stoop/Squat	Perform routine maintenance/repairs, pick up tools and needed equipment
Climb Stairs	Service requests, make-ready needs for 2 nd and 3 rd floor apartments
Push or Pull	Move equipment, appliances, open and close doors, etc.
Reach Above Shoulder	Perform routine maintenance/repairs, stock and remove equipment, parts, etc.
Climb Ladders	Perform routine maintenance/repairs
Grasp/Grip/Turning	Handle tools and equipment, perform routine maintenance/repairs
Finger Dexterity	Handle tools and equipment, perform routine maintenance/repairs
Writing	Inventory maintenance, requisition requests, required maintenance reports.

Lifting/Carrying (supplies, replacement parts, ladders, etc.):

Over 150 lbs.	Rare need (less than 1% of the time)
75 lbs. – 150 lbs.	Occasional need (1% to 33% of the time)
25 lbs. – 75 lbs.	Frequent need (33% to 66% of the time)
1 – 25 lbs.	Constant need (66% to 100% of the time)

NOTE: Lifting and carrying of weights exceeding 50 lbs. is to be accomplished with assistance from one or more persons. Examples of heaviest items lifted include washer/dryers, refrigerators, A/C units, abandoned sofas, etc.

VISION REQUIREMENTS

- Constant need (66% to 100% of the time) to document maintenance and complete forms, review manuals and operating instructions, read cautionary labels, respond to written instruction from staff and residents. Constant need to see small detail when performing routine maintenance duties.
- Frequent need (33% to 60% of the time) to see things clearly beyond arm's reach (oversee assistants, observe problems throughout the property).

HEARING REQUIREMENTS

- Constant need (66% to 100% of the time) to communicate with assistants, resident staff, vendors and residents. Must use listening skills to diagnose needed repairs, etc.

SPEAKING REQUIREMENTS

- Constant need (66% to 100% of the time) to verbally communicate with assistants, resident staff, vendors and residents.

MENTAL/EMOTIONAL REQUIREMENTS

- Must be able to work in a fast-paced and customer service-oriented environment.
- Performs duties under pressure and meets deadlines in a timely manner.
- Works as part of a team, as well as completes assignments independently.
- Takes instructions from supervisors.
- Exercises problem-solving skills.
- Interacts with co-workers, supervisors, guests and the public in a professional and pleasant manner.

DRIVING/TRAVELING REQUIREMENTS

- Frequent need (33% to 66% of the time) to utilize personal transportation to pick up replacement parts and supplies from vendors. Rotation "on call" status may occasionally require expedient travel to assigned property at moment's notice. Pick up and deliveries to the corporate office.
- Must have valid driver's license and automobile insurance coverage.

WORKING ENVIRONMENT

- Indoors (66% to 100% of the time). Frequently outdoors (33% to 66% of the time), all conditions, often for extended periods.
- Occasional exposure (1% to 33% of time) to paint fumes, solvents, adhesives, etc. Example: Apartments during/after make-ready.
- Frequent need (33% to 66% of the time) to work in awkward and confining positions.

REASONING DEVELOPMENT

- Moderate. Must be able to apply principles of logical thinking to a variety of practical situations and accurately follow standardized procedures that may occasionally involve minor deviations. Needs ability to think rationally beyond a specific set of instructions.

SAFETY RESPONSIBILITIES

- Learns and complies with all company safety rules.
- Uses appropriate safety equipment at all times.
- Immediately reports all unsafe conditions to supervisors.
- Must be familiar with all safety features or equipment, machinery, or materials encompassed by job duties.
- Must check with supervisor if there is a question as to the safe procedure to be used for any job function.

ADDITIONAL REQUIREMENTS

- Employees must fulfill the performance standards of this position and comply with policies, rules and procedures of the company, including those set out in the Employee Handbook, or otherwise communicated (verbally or in writing) to employees.
- This job description is intended to describe the general nature and work responsibilities of the position. This job description and the duties of this position are subject to change, modification and addition as deemed necessary by the company. Employees are required to comply with supervisory instructions and perform other job duties, responsibilities and assignments requested by supervisors, managers or other company officials.
- This job description does not constitute an employment contract between the company and any employee.
- The job responsibilities of this position may include cross-training in other functions or positions to ensure satisfactory operation of the department or work area.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge that I have received a copy of the assistant maintenance technician job description and understand that it is my responsibility to read and understand it. I understand that this job description may be used as a tool to evaluate the performance of my duties. If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Signature

Date

Printed Name

Job Description—Groundkeeper

Reports To: Manager

The purpose of this job description is to communicate the responsibilities and duties associated with the position of GROUNDSKEEPER. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties may not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review these duties, skills and physical requirements closely and that you understand that by signing the Job Description Acknowledgement, you are verifying that you can perform all the duties, have the skills and possess the physical abilities that are necessary to perform the job as described.

JOB SUMMARY

The primary responsibilities of the GROUNDSKEEPER involve the upkeep of the property in order to enhance and maintain its curb appeal. The GROUNDSKEEPER will also assist the rest of the staff, as directed, in their efforts to manage the property in an efficient manner.

WAGE/HOUR STATUS

Exempt (ineligible for overtime)

DUTIES AND RESPONSIBILITIES

Preventive Maintenance/Safety

- Checks and replaces exterior lighting on a regular basis.
- If certified for pool maintenance, cleans and maintains pool as directed.
- Maintains awareness of proper safety precautions at all times.
- Constantly observes condition of apartment property throughout the community and immediately reports and/or initiates action to correct unsafe conditions.
- Must be aware of all utility meter cut-offs, apartment and fixture cut-offs, sewer cleanouts.
- Ensures that storage areas remain locked when not in use.

General

- Physically walks the property on a frequent basis and removes litter, debris and pet droppings from the grounds. It is especially critical that the following areas remain neat and free of litter at all times.
 - Pool area.
 - Laundry room.
 - Mail rooms (if applicable/.
 - Dumpster areas.
 - Recreation areas.
 - Grounds adjacent to the road, in front of the office.
 - Walkways to and from, and in-between buildings.
 - Parking lots and drives.

- Performs "trash-out" duties at vacated apartments on a daily basis. Removes all abandoned furniture, trash, boxes. Transfers to dumpster or storage area, whichever is applicable.

- Transfers trash and other items left outside of dumpster into dumpster. Pick-ups and sweeps area. Keeps dumpster doors closed on windy days.

- Details property on a regular basis. Cleans and rakes shrub areas; shovels mud when necessary. Uses blower to keep sidewalks and walking areas clean of loose grass and brush.

- Repairs and replaces windows, screens, sliding glass doors, etc. Performs routine maintenance on property as requested by manager and senior maintenance technician.

- Assists with various physical tasks as directed; e.g., tearing down fences, digging post holes, carrying abandoned sofas, etc.

- Assists with "make-ready" duties when requested by the manager or senior maintenance technician.

- Helps clean and maintain storage areas.

- Performs interior and exterior painting duties when requested. Carries buckets of paint from storage area to work site.

- Completes minor and routine service requests when requested by manager and/or senior maintenance technician. Follow procedures when service requests are performed.

- Changes locks, makes keys when directed.

- Distributes resident communications to residents; e.g., upcoming events, pest control notices, newsletters.
- Performs work area clean-up and safety related duties.
- Assists in keeping grounds neat and free of litter; e.g., rakes, sweeps, shovels as circumstances warrant.
- Performs any additional duties assigned by senior maintenance technician and manager.

QUALIFICATIONS

Must meet all physical requirements and be able to take direction.

Equipment Requirement:

Required to wear back support belt, gloves, and other personal protective equipment as tasks dictate.

Work Hours:

Minimum of 40 hours per week, 8:30 a.m. to 5:30 p.m., Monday through Friday. Weekly schedule may change as required. May be necessary to work weekends.

Equipment/Machinery/Tools:

An employee in this position must be knowledgeable and skilled in the safe use and maintenance of the following tools:

Hand Tools	Various wrenches, hammer, grips, saws, sledgehammer, snips, posthole diggers, etc.
User-Moved Aids	Wheelbarrows, dollies, hand trucks, buckets, jacks, step ladders, full ladders

PHYSICAL REQUIREMENTS

- Constant need (66% to 100% of the time) to be on feet.
- Have constant need (66% to 100% of the time) to perform the following physical activities:

Bend/Stoop/Squat	Perform routine maintenance/repairs, pick up debris
Climb Stairs	Routine duties require access to 2 nd and 3 rd floor apartments
Push or Pull	Move equipment, appliances, open and close doors, etc.
Reach Above Shoulder	Perform routine maintenance/repairs, stock and remove equipment
Climb Ladders	Perform routine maintenance/repairs
Grasp/Grip/Turning	Handle tools and equipment, perform routine maintenance/repairs
Finger Dexterity	Handle tools and equipment, perform routine maintenance/repairs

Lifting/carrying (supplies, blower, ladders, etc.):

Over 150 lbs.	Rare need (less than 1% of the time)
75 lbs. – 150 lbs.	Occasional need (1% to 33% of the time)
25 lbs. – 75 lbs.	Frequent need (33% to 66% of the time)
1 – 25 lbs.	Constant need (66% to 100% of the time)

NOTE: Lifting and carrying of weights exceeding 50 lbs. is to be accomplished with assistance from one or more persons. Examples of heaviest items lifted include washer/dryers, refrigerators, A/C units, abandoned sofas, etc.

VISION REQUIREMENTS

- Constant need (66% to 100% of the time) to observe areas needing attention/correction. Read cautionary labels; respond to written instructions from staff.
- Frequent need (33% to 60% of the time) to see things clearly beyond arm's reach. Observe and assist in general maintenance; observe problems throughout property.

HEARING REQUIREMENTS

- Not essential. Frequent need (33% to 66% of the time) to receive instructions from residential management. Written instructions should be acceptable.

SPEAKING REQUIREMENTS

- Constant need (66% to 100% of the time) to verbally communicate with staff and residents.

MENTAL/EMOTIONAL REQUIREMENTS

- Must be able to work in a fast-paced and customer service-oriented environment.
- Performs duties under pressure and meets deadlines in a timely manner.
- Works as part of a team, as well as completes assignments independently.
- Takes instructions from supervisors.
- Exercises problem-solving skills.
- Interacts with co-workers, supervisors, guests and the public in a professional and pleasant manner.

WORKING ENVIRONMENT

- Outdoors (66% to 100% of the time), all conditions, often for extended periods of time.
- Occasional exposure (1% to 33% of time) to paint fumes, solvents, adhesives, etc. Example: Apartments during/after make-ready.
- Frequent need (33% to 66% of the time) to work in awkward and confining positions.

REASONING DEVELOPMENT

- Moderate. Must be able to apply principles of logical thinking to a variety of practical situations and accurately follow standardized procedures that may occasionally involve minor deviations. Needs ability to think rationally beyond a specific set of instructions.

SAFETY RESPONSIBILITIES

- Learns and complies with all company safety rules.
- Immediately reports all unsafe conditions to supervisors.
- Must be familiar with all safety features or equipment, machinery, or materials encompassed by job duties.
- Must check with supervisor if there is a question as to the safe procedure to be used for any job function.

ADDITIONAL REQUIREMENTS

- Employees must fulfill the performance standards of this position and comply with policies, rules and procedures of the company, including those set out in the Employee Handbook, or otherwise communicated (verbally or in writing/ to employees).
- This job description is intended to describe the general nature and work responsibilities of the position. This job description and the duties of this position are subject to change, modification and addition as deemed necessary by the company. Employees are required to comply with supervisory instructions and perform other job duties, responsibilities and assignments requested by supervisors, managers or other company officials.
- This job description does not constitute an employment contract between the company and any employee.
- The job responsibilities of this position may include cross-training in other functions or positions to ensure satisfactory operation of the department or work area.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge that I have received a copy of the groundskeeper job description and understand that it is my responsibility to read and understand it. I understand that this job description may be used as a tool to evaluate the performance of my duties. If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Signature

Date

Printed Name

Job Description—Make-Ready Technician

Reports To: Manager

The purpose of this job description is to communicate the responsibilities and duties associated with the position of MAKE-READY. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties may not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review these duties, skills and physical requirements closely and that you understand that by signing the Job Description Acknowledgement, you are verifying that you can perform all the duties, have the skills and possess the physical abilities that are necessary to perform the job as described.

JOB SUMMARY

In coordination with the manager and senior maintenance technician, The MAKE-READY employee's primary responsibility is to ensure that all vacated apartments are thoroughly restored to "market ready" status in a timely manner and according to the manager's timetable.

WAGE/HOUR STATUS

Non-Exempt (eligible for overtime)

DUTIES AND RESPONSIBILITIES

- Inspects vacated apartments and completes checklists in regard to make-ready. Informs senior maintenance technician and manager of needed services and repairs.
- Routinely performs the following duties in order to restore apartment to "market ready" status:
 - Checks all lights and replaces as necessary.
 - Replaces or repairs windows, latches, screens, hinges, sliding glass doors, shelves, baseboards, mirrors, closets.
 - Checks applicable appliances and informs senior maintenance technician of problems.
 - Assists in changing or removing appliances from apartment.
 - Makes keys when necessary.
 - Checks faucets, sink plugs and repairs/replaces as necessary. Replaces washers when needed. Performs exterior repairs to sinks, bathtubs, etc., when warranted.
 - Assists with painting duties when requested. Transfers paint from storage areas to apartments when painting is scheduled.

- Repairs or replaces curtains, mini-blinds, ceiling fans, etc.
 - Repairs plaster holes in walls, paints as necessary.
 - Inspects bathroom tiles, performs minor repairs/replacements.
 - Changes A/C filters
 - Operates carpet cleaning equipment to clean carpets.
-
- Lends assistance during trash-out of apartment; e.g., moving heavy/bulky items to dumpster.
 - Replaces vacancy lock (if applicable) on day lock is changed for new resident for move-in. Also changes out P.O. Box lock when requested (if applicable).
 - Makes new keys when requested.
 - Assists in keeping grounds clean at all times.
 - Assists maintenance when requested.
 - Delivers notices to all apartment.
 - Reports supply needs to manager and/or senior maintenance technician.
 - Performs other tasks as assigned by manager or senior maintenance technician.

QUALIFICATIONS

Must meet all physical requirements and be able to take direction.

Equipment Requirement:

Required to wear back support belt and gloves as tasks dictate. Wear appropriate shoes (no flat bottom sneakers).

Work Hours:

40 hours per week, 8:30 a.m. to 5:30 p.m., Monday through Friday. Weekly schedule may change as required. May be necessary to work weekends.

Equipment/Machinery/Tools:

An employee in this position must be knowledgeable and skilled in the safe use and maintenance of cleaning fluids and tools, including mop, broom, vacuum cleaner, carpet cleaning equipment, buffer, step ladder, full ladder, hand tools, key-cutting machine, hand truck, wheelbarrow.

PHYSICAL REQUIREMENTS

- Constant need (66% to 100% of the time) to be on feet.
- Have constant need (66% to 100% of the time) to perform the following physical activities:

Bend/Stoop/Squat	Perform routine cleaning; pick up debris
Climb Stairs	Routine cleaning duties require access to 2 nd and 3 rd floor apartments
Push or Pull	Move light furniture, appliances, open and close doors, etc.
Reach Above Shoulder	Perform routine cleaning duties
Climb Ladders	Perform routine cleaning duties
Grasp/Grip/Turning	Handle cleaning tools and equipment
Finger Dexterity	Handle cleaning tools and equipment
Writing	Inventory maintenance, requisition requests, required maintenance reports.

Lifting/carrying (supplies, paint, carpet cleaning equipment, etc.):

Over 100 lbs.	Rare need (less than 1% of the time)
50 lbs. – 75 lbs.	Occasional need (1% to 33% of the time)
25 lbs. – 50 lbs.	Frequent need (33% to 66% of the time)
1 – 25 lbs.	Constant need (66% to 100% of the time)

VISION REQUIREMENTS

- Constant need (66% to 100% of the time) to notice difference between clean and unclean. Observe areas needing attention.
- Frequent need (33% to 60% of the time) to see things clearly beyond arm's reach. Observe and assist maintenance; observe problems throughout property.

HEARING REQUIREMENTS

- Not essential. Frequent need (33% to 66% of the time) to receive instructions from residential management. Written instructions should be acceptable.

SPEAKING REQUIREMENTS

- Not essential. Frequent need (33% to 66% of the time) to ask questions, request supplies. Written instructions should be acceptable.

MENTAL/EMOTIONAL REQUIREMENTS

- Must be able to work in a fast-paced and customer service-oriented environment.
- Performs duties under pressure and meets deadlines in a timely manner.
- Works as part of a team, as well as complete assignments independently.
- Takes instructions from supervisors.
- Exercises problem-solving skills.
- Interacts with co-workers, supervisors, guests and the public in a professional and pleasant manner.

DRIVING/TRAVELING REQUIREMENTS

- None.

WORKING ENVIRONMENT

- Indoors (66% to 100% of the time). Occasionally outdoors (1% to 33% of the time).
- Occasional exposure (1% to 33% of time) to cleaning solvents, adhesives, paint fumes, etc.
- Frequent need (33% to 66% of the time) to work in awkward and confining positions.

REASONING DEVELOPMENT

- Moderate. Must be able to apply common sense understanding to carry out simple one to two-step instructions. Deals with standardized situations with occasional or no deviations from standard procedures.

SAFETY RESPONSIBILITIES

- Learns and complies with all company safety rules.
- Immediately reports all unsafe conditions to supervisors.
- Must be familiar with all safety features or equipment, machinery, or materials encompassed by job duties.
- Must check with supervisor if there is a question as to the safe procedure to be used for any job function.

ADDITIONAL REQUIREMENTS

- Employees must fulfill the performance standards of this position and comply with policies, rules and procedures of the company, including those set out in the Employee Handbook, or otherwise communicated (verbally or in writing/ to employees.
- This job description is intended to describe the general nature and work responsibilities of the position. This job description and the duties of this position are subject to change, modification and addition as deemed necessary by the company. Employees are required to comply with supervisory instructions and perform other job duties, responsibilities and assignments requested by supervisors, managers or other company officials.
- This job description does not constitute an employment contract between the company and any employee.
- The job responsibilities of this position may include cross-training in other functions or positions to ensure satisfactory operation of the department or work area.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge that I have received a copy of the make-ready job description and understand that it is my responsibility to read and understand it. I understand that this job description may be used as a tool to evaluate the performance of my duties. If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Signature

Date

Printed Name

Job Description—Housekeeper

Reports To: Manager

The purpose of this job description is to communicate the responsibilities and duties associated with the position of HOUSEKEEPER. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties may not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review these duties, skills and physical requirements closely and that you understand that by signing the Job Description Acknowledgement, you are verifying that you can perform all the duties, have the skills and possess the physical abilities that are necessary to perform the job as described.

JOB SUMMARY

The primary responsibilities of the HOUSEKEEPER involve the upkeep of each apartment in order to enhance and maintain its appeal. The HOUSEKEEPER will also assist the rest of the staff, as directed, in their efforts to manage the property in an efficient manner.

WAGE/HOUR STATUS

Exempt (ineligible for overtime)

DUTIES AND RESPONSIBILITIES

- Cleans the office, clubroom, and restrooms on a daily basis (prior to 9 a.m.).
- Cleans and maintains models on a daily basis.
- Cleans all vacant apartments as directed by the manager or assistant manager.
- Keeps all vacancies fresh and odorless.
- Cleans and maintains laundry facilities daily by 10:00 a.m.
- Performs additional duties requested by the manager or assistant manager.
- Informs management of supply needs on a bimonthly basis.

QUALIFICATIONS

Must meet all physical requirements and be able to take direction.

Equipment Requirement:

Mops, brooms, vacuum cleaner, window squeegee, scrubber, step stool, small ladder, screwdriver, and other miscellaneous hand tools. Is required to wear gloves as tasks dictate.

Work Hours:

Minimum of 40 hours per week, 8:30 a.m. to 5:30 p.m., Monday through Friday. Weekly schedule may change as required. May be necessary to work weekends.

Equipment:

An employee in this position must be knowledgeable and skilled in the safe use and maintenance of cleaning fluids and tools.

PHYSICAL REQUIREMENTS

- Constant need (66% to 100% of the time) to be on feet.
- Have constant need (66% to 100% of the time) to perform the following physical activities:

Bend/Stoop/Squat	Perform routine cleaning; pick up debris
Climb Stairs	Routine cleaning duties require access to 2 nd and 3 rd floor apartments
Push or Pull	Move light furniture, appliances, open and close doors, etc.
Reach Above Shoulder	Perform routine cleaning duties
Climb Ladders	Perform routine cleaning duties
Grasp/Grip/Turning	Handle cleaning tools and equipment
Finger Dexterity	Handle cleaning tools and equipment

Lifting/carrying (cleaning supplies, vacuum, step stool, etc.):

50 lbs. – 75 lbs.	Rare need (less than 1% of the time)
25 lbs. – 50 lbs.	Occasional need (1% to 33% of the time)
1 lb. – 25 lbs.	Constant need (66% to 100% of the time)

- Required to handle cleaning chemicals. Certain cleaning chemicals may require pre-mixing.

VISION REQUIREMENTS

- Constant need (66% to 100% of the time) to observe areas needing attention/correction. Read cautionary labels; respond to written instructions from staff.
- Frequent need (33% to 60% of the time) to see things clearly beyond arm's reach. Observe and assist maintenance; observe problems throughout property.

HEARING REQUIREMENTS

- Not essential. Frequent need (33% to 66% of the time) to receive instructions from residential management. Written instructions should be acceptable.

SPEAKING REQUIREMENTS

- Constant need (66% to 100% of the time) to verbally communicate with staff and residents.

MENTAL/EMOTIONAL REQUIREMENTS

- Must be able to work in a fast-paced and customer service-oriented environment.
- Performs duties under pressure and meets deadlines in a timely manner.
- Works as part of a team, as well as completes assignments independently.
- Takes instructions from supervisors.
- Exercises problem-solving skills.
- Interacts with co-workers, supervisors, guests and the public in a professional and pleasant manner.

WORKING ENVIRONMENT

- Indoors (66% to 100% of the time). Occasionally outdoors (1% to 33% of the time).
- Occasional exposure (1% to 33% of time) to cleaning chemicals, paint fumes, solvents, adhesives, etc. Example: Apartments during/after make-ready.
- Frequent need (33% to 66% of the time) to work in awkward and confining positions.

REASONING DEVELOPMENT

- Moderate. Must be able to apply principles of logical thinking to a variety of practical situations and accurately follow standardized procedures that may occasionally involve minor deviations. Needs ability to think rationally beyond a specific set of instructions.

SAFETY RESPONSIBILITIES

- Learn and comply with all company safety rules.
- Use appropriate safety equipment at all times.
- Immediately report all unsafe conditions to supervisors.
- Must be familiar with all safety features or equipment, machinery, or materials encompassed by job duties.
- Must check with supervisor if there is a question as to the safe procedure to be used for any job function.

ADDITIONAL REQUIREMENTS

- Employees must fulfill the performance standards of this position and comply with policies, rules and procedures of the company, including those set out in the Employee Handbook, or otherwise communicated (verbally or in writing) to employees.
- This job description is intended to describe the general nature and work responsibilities of the position. This job description and the duties of this position are subject to change, modification and addition as deemed necessary by the company. Employees are required to comply with supervisory instructions and perform other job duties, responsibilities and assignments requested by supervisors, managers or other company officials.
- This job description does not constitute an employment contract between the company and any employee.
- The job responsibilities of this position may include cross-training in other functions or positions to ensure satisfactory operation of the department or work area.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge that I have received a copy of the housekeeper job description and understand that it is my responsibility to read and understand it. I understand that this job description may be used as a tool to evaluate the performance of my duties. If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Signature

Date

Printed Name

Job Description—Painter

Reports To: Manager

The purpose of this job description is to communicate the responsibilities and duties associated with the position of PAINTER. While the following information should be considered a comprehensive description of this position, it should also be noted that some responsibilities and duties may not be specifically addressed.

Every person is expected to perform any reasonable task or request that is consistent with fulfilling company objectives.

It is imperative that you review these duties, skills and physical requirements closely and that you understand that by signing the Job Description Acknowledgement, you are verifying that you can perform all the duties, have the skills and possess the physical abilities that are necessary to perform the job as described.

JOB SUMMARY

In coordination with the manager and the senior maintenance technician, the PAINTER'S primary responsibility is to ensure that all vacated apartments are painted to "market ready" status in a timely manner and according to the manager's timetable.

WAGE/HOUR STATUS

Exempt (ineligible for overtime)

DUTIES AND RESPONSIBILITIES

- Inspects and paints vacated apartments and completes required forms in regard to painting.
- Routinely performs the following duties in order to restore apartment to "market ready" status:
 - Communicates with manager concerning particular apartments that need painting in order of priority.
 - Works at a pace which will leave enough time for other maintenance personnel to complete their functions in the make-ready process.
 - Reports to manager when paint and/or supplies are low to avoid depletion.
 - Repairs holes in walls, caulks tubs, repairs ceramic tile.
 - Performs all tasks in a neat and efficient manner. This includes cleaning all brushes, rollers and equipment and returning said equipment to their designated storage facility at the end of each day.
 - Wears uniform as instructed by manager which may include providing your own painter's whites.
 - Uses protective equipment when necessary following all safety procedures.
 - Performs other work duties as directed by manager.

QUALIFICATIONS

Must meet all physical requirements and be able to take direction.

Equipment Requirement:

Required to wear back support belt, steel-toed shoes, glasses and gloves as tasks dictate. Vehicle equipped for hauling miscellaneous maintenance materials is required.

Work Hours:

Minimum of 40 hours per week, 8:30 a.m. to 5:30 p.m., Monday through Friday. Weekly schedule may change as required. May be necessary to work weekends.

Equipment:

An employee in this position must be knowledgeable and skilled in the safe use and maintenance of cleaning fluids and tools, including mop, broom, vacuum cleaner, carpet cleaning equipment, buffer, step ladder, full ladder, hand tools, key-cutting machine, hand truck and wheelbarrow.

PHYSICAL REQUIREMENTS

- Constant need (66% to 100% of the time/ to be on feet.
- Have constant need (66% to 100% of the time) to perform the following physical activities:

Bend/Stoop/Squat/Kneel	Perform routine painting; pick up debris
Climb Stairs	Routine painting duties require access to 2 nd and 3 ^d floor apartments
Push or Pull	Move light furniture, appliances, open and close doors, etc.
Reach Above Shoulder	Perform routine painting duties
Climb Ladders	Perform routine painting duties
	Handle painting tools and equipment
Grasp/Grip/Turning	Handle painting tools and equipment
Finger Dexterity	Inventory paint, requisition, requests, required maintenance reports
Writing	

Lifting/carrying (supplies, paint, carpet cleaning equipment, etc.):

Over 100 lbs.	Rare need (less than 1% of the time)
50 lbs. – 75 lbs.	Occasional need (1% to 33% of the time)
25 lbs. – 50 lbs.	Frequent need (33% to 66% of the time)
1 lb. – 25 lbs.	Constant need (66% to 100% of the time)

VISION REQUIREMENTS

- Constant need (66% to 100% of the time) to notice difference between painted surfaces and unpainted surfaces. Observe areas needing attention.
- Frequent need (33% to 60% of the time) to see things clearly beyond arm's reach. Observe and assist maintenance; observe problems throughout property.

HEARING REQUIREMENTS

- Not essential. Frequent need (33% to 66% of the time) to receive instructions from residential management. Written instructions should be acceptable.

SPEAKING REQUIREMENTS

- Not essential. Frequent need (33% to 66% of the time) to ask questions, request supplies. Written instructions should be acceptable.

MENTAL/EMOTIONAL REQUIREMENTS

- Must be able to work in a fast-paced and customer service-oriented environment.
- Performs duties under pressure and meets deadlines in a timely manner.
- Works as part of a team, as well as completes assignments independently.
- Takes instructions from supervisors.
- Exercises problem-solving skills.
- Interacts with co-workers, supervisors, guests and the public in a professional and pleasant manner.

DRIVING/TRAVELING REQUIREMENTS:

- None.

WORKING ENVIRONMENT

- Indoors (66% to 100% of the time). Occasionally outdoors (1% to 33% of the time).
- Frequent exposure (66% to 100% of time) to paint or cleaning solvents, adhesives, paint fumes, etc.
- Frequent need (33% to 66% of the time) to work in awkward and confining positions.

REASONING DEVELOPMENT

- Moderate. Must be able to apply common sense understanding to carry out simple one to two-step instructions. Deal with standardized situations with occasional or no deviations from standard procedures.

SAFETY RESPONSIBILITIES

- Learns and complies with all company safety rules.
- Uses appropriate safety equipment at all times.

- Immediately reports all unsafe conditions to supervisors.
- Must be familiar with all safety features or equipment, machinery, or materials encompassed by job duties.
- Must check with supervisor if there is a question as to the safe procedure to be used for any job function.

ADDITIONAL REQUIREMENTS

- Employees must fulfill the performance standards of this position and comply with policies, rules and procedures of the company, including those set out in the Employee Handbook, or otherwise communicated (verbally or in writing) to employees.
- This job description is intended to describe the general nature and work responsibilities of the position. This job description and the duties of this position are subject to change, modification and addition as deemed necessary by the company. Employees are required to comply with supervisory instructions and perform other job duties, responsibilities and assignments requested by supervisors, managers or other company officials.
- This job description does not constitute an employment contract between the company and any employee.
- The job responsibilities of this position may include cross-training in other functions or positions to ensure satisfactory operation of the department or work area.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge that I have received a copy of the painter job description and understand that it is my responsibility to read and understand it. I understand that this job description may be used as a tool to evaluate the performance of my duties.

If I have any questions about this job description or my job duties, I understand that I should ask my supervisor or department manager.

Signature

Date

Printed Name

Interview Guides Overview

How to use these guides



The Interview Guide provides first and second interview questions. The questions are categorized by job requirements/skills and multiple questions are provided for each requirement/skill area.

Review the questions thoroughly and determine which ones are most appropriate for the available position. Highlight those questions and use them for the first interview. Use the remaining questions for a second interview if necessary. Be prepared to ask follow-up questions as needed to get the candidate to provide specific, behavioral experiences.

Prepare this guide leaving space between questions for taking notes on the candidate's answers, and for later comparing how various candidates responded to the same questions.

Interview Guide—Property Manager

CANDIDATE:

DATE:

COMMUNITY:

INTERVIEWED BY:

BACKGROUND REVIEW

1. Describe your key responsibilities and accomplishments in your last position.
2. How did these responsibilities differ from your other positions?
3. Why did you decide to leave your last position?
4. How can this position help you fulfill your career objectives?
5. Tell me about your educational background (include formal education, additional programs or courses taken on the job, major area of study, and grades/. How have these helped you in your past positions? How can they help you in this position?

LEASING

1. Tell me how you have formulated sales and marketing strategies? What was the most creative sales approach you have used?
2. What leasing and marketing reports did you have to produce? How did you use these reports?
3. Describe your sales responsibilities. What were your key sales accomplishments (closing ratios, % of sales quotas exceeded, awards, etc./?
4. Describe your approach to learning about a new community. What types of information or activities have you found to be the most critical to understanding a new community? How have you gone about obtaining this information or completing these activities?

COLLECTING RENTS

1. Describe for me the methods you have used in the past to collect rents or past due accounts, and to minimize delinquencies. Which method(s) worked the best? How did you know it was working?
2. How many times have you had to follow through with an eviction or final collection notices? How many times have you personally had to represent your company in court during an eviction case?
3. Give me an example of a collection situation in which the resident's reason for failure to pay made it difficult for you to enforce your company's policy. How did you handle that situation?

MANAGING SERVICE / MAINTENANCE

1. Tell me about how you worked with your maintenance staff to develop and implement plans for handling all of the maintenance projects on your property.
2. Describe the process you have used for tracking progress on maintenance and service requests. (Follow-up to find out about automated systems, paperwork, overall follow-up quality of work, etc./
3. What experience have you had in handling "crises" maintenance situations? Tell me about one of the more serious situations you have handled, and explain your role in that situation.

BUDGET FORMULATION AND MANAGEMENT

1. What budget processes have you used in the past? What were your accountabilities with respect to budgeting?
2. What was the total income from your previous community or business?
3. Describe your key accomplishments with respect to budget management. (If necessary, ask about whether they exceeded NOI, whether they achieved the community's budgeted cash flow, how they controlled expenses, and what they did to generate income, etc./
4. What methods have you implemented to track and report budget performance and variances?

MARKETING

1. Describe your experience in formulating and implementing marketing plans. How successful were your overall marketing efforts? How do you know they were successful?
2. Give me an example of a "creative" or "original" marketing or advertising idea you initiated and implemented.
3. What methods have you used for completing market analyses? How have you anticipated and tracked market trends?

COMMUNITY CUSTOMER SERVICE

1. Describe what you did to promote customer service and retention in your previous position. Give me examples of some of the specific actions or activities you introduced.
2. Describe an instance in which you handled a difficult resident or customer situation. What was the situation, what did you specifically do, and what were the results?
3. How have you tracked your community's or business' customer service performance?

DECISION-MAKING AND PROBLEM SOLVING

1. What was a particularly difficult decision you have had to make in your previous work experience? What made that decision especially difficult? Walk me through the process you used to arrive at the decision, and describe the outcome?
2. Describe to me your approach to solving complex problems. Now, think of a specific time when you used that approach, and walk me through the steps you took.
3. What types of decisions do you find "easy" to make? When was the last time you had to make a decision of that type?

STAFF MANAGEMENT

1. How many people would you estimate that you have had to hire in the past three years? Describe the process you have used for interviewing and selecting candidates (ask for sample questions they have used/).
2. Tell me about a success you have had with a staff member who had some difficulties in his or her performance. Exactly what did you do, and what did you say?
3. Can you describe an instance in which you lost your temper with a staff member? What happened and how did you handle it?
4. What type of boss drives you nuts? Describe what you have done when confronted with behavior of that type.

CHANGE, STRESS, RISK-TAKING

1. Give me an example of a “risk” you took in your last job. What was the situation and what made it risky? How did you go about working through that situation?
2. Describe a few “major” improvements which you introduced in your last job. What did you do to encourage buy-in and commitment from those impacted by the change?
3. When was the last time you changed your mind about a decision or situation? Tell me about it, and what made you change your mind?

SUMMARY

1. From an operations standpoint, what would you describe as your greatest strength? Tell me about how you have applied that strength to a particular situation and what was the result?
2. Describe what you consider to be a personal “failure.” What did you learn from that situation?
3. In addition to everything you have told me, what else should I know about you that may affect my hiring decision?

TO CLOSE OUT THE INTERVIEW

- Tell the candidate about the position, and respond to any questions the candidate may have.
- Explain the next step in the hiring process, when you expect to make a decision; and how he or she will be informed of the decision.
- Thank the candidate.

Notes:

Interview Guide—Assistant Manager and/or Bookkeeper

CANDIDATE: _____

DATE: _____

COMMUNITY: _____

INTERVIEWED BY: _____

BACKGROUND REVIEW

1. Why will this position help you achieve your career objectives?
2. In your last job, for which tasks did you have full responsibility?
3. Tell me what was happening when you left your last position(s). Why did you leave? If downsized, how many people were affected?
4. What would your past/current employer have to do to keep you?
5. What was your favorite/least favorite part about your last position?
6. What do you expect your previous employers to say when we call to check your references?
7. Tell me about your educational background (include formal education, additional programs or courses taken on the job, major area of study, and grades/. How will your background contribute to your success in this position?
8. How has your last job prepared you for this job? What would your boss say is an area you could improve?
9. What percentage of the time did you spend bookkeeping at your last position?

COMPUTER/BOOKKEEPING SKILLS

1. How did you use a computer in your work? What software programs are you proficient in? How did you use these software programs?
2. How did you go about learning how to use the computer systems in your previous jobs?
3. Tell me about a difficult situation you have had with a co-worker in the past. What was the outcome?
4. Describe for me the methods you have used in the past to collect rents or past due accounts, and to minimize delinquencies. Which methods do you think worked best?
5. What is the hardest/most challenging part about bookkeeping for you?

ADMINISTRATIVE

1. How much time did you spend in your previous job doing paperwork for either property management or program compliance? Describe the paperwork you had to complete – what types of paperwork did you enjoy doing or dislike?
2. What types of reports (property and program-related/ did you have to generate, and how often? How were those reports used in your business?

CUSTOMER SERVICE

1. Some people are easier to interact with than others. Tell me about an instance in which you had to handle a particularly difficult resident or customer. How did you handle it?
2. From past experience, what do you think is the best way to handle problems and complaints from customers?
3. Give me an example of a time when you went “out of your way” to help a resident or customer. What was the situation, and what specifically did you do or say?
4. Did you make suggestions in any previous job to improve morale, increase output, or increase customer satisfaction? What were they?
5. Can you think of an incident when you should have done more than you did to solve a complaint or issue? What held you back from doing it?

FOLLOW - UP

1. Everyone can miss a deadline from time to time. When was the last time you missed a deadline because you failed to follow up on something? How did you handle it?
2. Describe to me how you organize your workday. What types of “tools” or methods have you used to manage your time? (Look for the use of “to do” lists, calendars, tickler files, and so on./

DECISION MAKING

1. Give me an example of a really *good* decision you have made? What about a decision you later regretted?
2. What types of decisions did you make in your last position, without first checking with your manager? On what types of decisions did you ask for input prior to making a decision?

RISKTAKING AND ACTION ORIENTATION

1. Sometimes we have to act quickly, without the benefit of having a policy or procedure to follow. Give me an example of a time when you had to act quickly—on your own—and what happened in that situation.
2. Can you recall an instance in which you had to take a risk on the job? What was the situation, and what made it risky. What happened?

CHANGE AND STRESS

1. Describe a change that took place in your last job, which you found difficult to understand or accept. What was the situation, and how did you adapt to the change?
2. What types of activities create stress for you on the job? What did you do to cope or manage the stress?

PROBLEM SOLVING AND CONFORMITY

1. Think of a difficult or challenging problem you had to solve on your last job. Walk me through the process you used for solving that problem. What was the outcome?
2. Tell me about a disagreement you had with your last manager or other property personnel. What was the situation and what did you do?

MOTIVATION / ATTITUDE

1. Do you see yourself as a leader or a team member? Why?
2. What would you do if your supervisor made a decision with which you strongly disagreed?
3. How does this job compare with others you have applied for?
4. What do you expect from the company that hires you?
5. What are the things you look for in a job?
6. What are your career goals? Where do you want to be in 5 years?
7. What motivates you to be successful?

SUMMARY

1. How does the position with our company “fit” with your overall career goals?
2. In addition to what you have already told me, is there anything else you would like me to know about yourself to help me with my hiring decision?

TO CLOSE OUT THE INTERVIEW

- Tell the candidate about the position, and respond to any questions the candidate may have.
- Explain the next step in the hiring process, when you expect to make a decision; and how he or she will be informed of the decision.
- Thank the candidate.

Notes:

Interview Guide—Leasing Coordinator and/or Leasing Consultant

CANDIDATE: _____
DATE: _____
COMMUNITY: _____
INTERVIEWED BY: _____

BACKGROUND REVIEW

1. Tell me what was happening when you left your last position(s). Why did you leave? If downsized, how many others were affected?
2. What would your past/current employer have to do to keep you?
3. What was your favorite/least favorite part about your last position?
4. In your last job, for which tasks did you have full responsibility?
5. What do you expect your previous employers to say when we call to check your references?
6. What would your boss say is an area you could improve?
7. How has your last job prepared you for this job?

LEASING / SALES (*For Experienced Applicant*)

1. Think about a specific sales situation or imagine one, and tell me what you did or would do to “close” the sale.
2. How many prospects/applicants do you handle in a day? How did prospects/applicants come to your business (appointments, walk-ins, etc.)? What was your closing ratio—how many sales did you close on the average week or month?
3. Describe the application and waitlist process you used at the community where you worked?
4. How did your sales efforts affect the profitability of your office or place where you worked?
5. What computer programs are you proficient in?

LEASING / SALES (For Inexperienced Applicant)

1. Tell me a time when you successfully negotiated being put in charge of a final decision.
2. Define an opportunity in which you appropriately took advantage of the situation.
3. Give me an example of a time when your energy level and focus created a very positive result.
4. Prioritize your day of errands.
5. Outline the steps you've taken recently to convince an individual to do a task for you.
6. Walk me through a scenario in which you properly diffused a potentially negative exchange between two individuals in the recent past.
7. Describe a time when you were not satisfied with the final outcome of a situation.
8. What steps did you take to rectify the situation?
9. List the ways in which you exhibit active listening skills.
10. What types of team activities have you participated in?
11. What computer programs are you proficient in?

ADMINISTRATIVE

1. How much time did you spend in your previous job doing paperwork for either property management or program compliance? Describe the paperwork you had to complete—what types of paperwork did you enjoy doing and dislike?
2. What type of reports (property and program-related/ did you have to generate, and how often? How were those reports used in your business?

CUSTOMER SERVICE

1. Describe an instance in which you handled a difficult resident or customer. What was the outcome?
2. Did you make suggestions in any previous job to improve morale, increase output, or increase customer satisfaction? What were they?
3. Can you think of an incident when you should have done more than you did to solve a complaint or issue? What held you back from doing it?

FOLLOW - UP

1. Everyone can miss a deadline from time to time. When was the last time you missed a deadline because you failed to follow up on something? How did you handle it?
2. Describe to me how you organize your workday. What types of “tools” or methods have you used to manage your time? (Look for the use of “to do” lists, calendars, tickler files, and so on./

DECISION MAKING

1. Give me an example of a really *good* decision you have made? What about a decision you later regretted?
2. What types of decisions did you make in your last position, without first checking with your manager? On what types of decisions did you ask for input prior to making a decision?

RISK TAKING AND ACTION ORIENTATION

1. Sometimes we have to act quickly, without the benefit of having a policy or procedure to follow. Give me an example of a time when you had to act quickly – on your own – and what happened in that situation.
2. Can you recall an instance in which you had to take a risk on the job? What was the situation, and what made it risky. What happened?

CHANGE AND STRESS

1. Describe a change that took place in your last job which you found difficult to understand or accept. What was the situation, and how did you adapt to the change?
2. What types of activities create stress for you on the job? What did you do to cope or manage the stress?

PROBLEM SOLVING

1. Think of a difficult or challenging problem you had to solve on your last job. Walk me through the process you used for solving that problem. What was the outcome?
2. Tell me about a disagreement you had with you last manager or other property personnel. What was the situation and what did you do?

MOTIVATION / ATTITUDE

1. Do you see yourself as a leader or a team member?
2. What would you do if your supervisor made a decision with which you strongly disagreed?
3. How does this job compare with others you have applied for?
4. What do you expect from the company that hires you?
5. What are your career goals? Where do you want to be in 5 years?
6. What are the things you look for in a job?
7. What motivates you to be successful?

SUMMARY

1. How does the position with our company “fit” with your overall career goals?
2. In addition to what you have already told me, is there anything else you would like me to know about yourself to help me with my hiring decision?

TO CLOSE OUT THE INTERVIEW

- Tell the candidate about the position, and respond to any questions the candidate may have.
- Explain the next step in the hiring process, when you expect to make a decision; and how he or she will be informed of the decision.
- Thank the candidate.

Notes:

Interview Guide—Lead Maintenance Technician/Supervisor

CANDIDATE: _____
DATE: _____
COMMUNITY: _____
INTERVIEWED BY: _____

BACKGROUND REVIEW

1. Describe your key responsibilities and accomplishments in your previous position(s).
2. Tell me what was happening when you left your last position(s). Why did you leave? If downsized, how many people were affected?
3. Tell me about your educational background (include formal education, technical training, any additional training taken on the job). What licenses and permits do you currently hold and (if appropriate/, when do they expire?
4. What would your past/current employer have to do to keep you?
5. What was your favorite/least favorite part about your last position?
6. In your last job, for which tasks did you have full responsibility?
7. What do you expect your employers to say when we call to check your references?

SERVICE REQUESTS

1. Describe the processes you have used to organize, prioritize, and complete routine maintenance/service work (repairs, work orders, etc.).
2. About how many Service Requests (work orders, etc./ did your maintenance staff handle on an average day? What types of requests did you and your staff handle?
3. How did you monitor and track the quality of service work done by you and your staff? Tell me about the methods you used, and what information you could obtain from those methods?
4. What was your average response time to a Service Request?
5. What do you find to be the most difficult items to repair?
6. Describe the types of interactions you had with customers or residents in your previous position.
7. Can you give me an example of a time when one of your staff members developed a performance problem, and what you did to correct the situation?

MAINTENANCE SHOP

1. Tell me about a maintenance “shop” you actually set up and managed. How was it organized, and how did you make it cost-effective and efficient?
2. How often did you order equipment, tools, and supplies in your previous position? Tell me the process you used placing orders, bidding costs, and managing costs.
3. Tell me how you have implemented an inventory control system? Was it automated or “computerized?” (Determine if the candidate has had any experience in automated inventory control systems./

MAKE READIES

1. On average how many make readies did you turn monthly? How quickly were you able to turn them?

BUDGET/COST CONTROL

1. Describe your experience in budget forecasting and budget management. What was the service/maintenance budget at your last job? How did your service operation perform against budget?
2. Tell me about something you did as a service manager to enhance cost control, and describe the results your ideas had on the business.
3. Give me an example of what you did when needed funds and parts were not available.

RESIDENT / CUSTOMER SERVICE

1. Describe the types of interactions you personally had with customers or residents in your previous position(s).
2. Describe the types of interaction you had with the office staff in your last position. How regularly did you meet with the office manager? What did you find to be the most difficult situations to handle with the office staff?
3. Give me an example of a particularly difficult customer/resident situation in which you were involved, and tell me how you handled it.
4. What steps would you take to assure that a response was made to a Service Request within 24 hours?

STAFF MANAGEMENT

1. What experience have you had in hiring service/maintenance professionals? Tell me how you went about choosing your staff.
2. Can you give me an example of a time when one of your staff members developed a performance problem, and what you did to correct the situation?
3. Explain how you have distributed workload across your staff. Walk me through the process you have used for assigning work to make sure everything gets done.
4. Were any of your staff members promoted due to your guidance and development?

SAFETY

1. Describe for me the most serious safety-related situation you have ever handled. What was the situation, and how did you handle it?
2. What programs, plans, or ideas have you implemented to improve and ensure the safety of you, your staff, and others?

PREVENTIVE MAINTENANCE

1. Describe the types of “preventive” maintenance projects you have supervised. How did you go about planning and completing these projects?
2. Can you think of an instance in which failure to plan or complete preventive maintenance caused your service operation some problems? What was the situation, and how did you handle it?

WORKING WITH CONTRACTORS/VENDORS

1. How many outside contractors or vendors did your last community or business deal with on a regular basis, and what were they? What was your role in working with the contractors?
2. Can you recall an instance when you were dissatisfied with the work provided by a contractor or vendor? Tell me how you handled that?

MOTIVATION/ATTITUDE

1. What would you do if your supervisor made a decision with which you strongly disagreed?
2. What do you expect from the company that hires you?
3. What are your career goals? Where do you want to be in 5 years?
4. What motivates you to be successful?

SUMMARY

1. Describe what you believe the primary purpose of a service operation should be. Give me some examples of objectives or goals you have set which reflect this purpose.
2. What else would you like me to know about you prior to my making this hiring decision?

TO CLOSE OUT THE INTERVIEW

- Tell the candidate about the position, and respond to any questions the candidate may have.
- Explain the next step in the hiring process, when you expect to make a decision; and how he or she will be informed of the decision.
- Thank the candidate.

Notes:

Interview Guide—Assistant Maintenance Technician and/or Make-Ready Technician

CANDIDATE: _____
DATE: _____
COMMUNITY: _____
INTERVIEWED BY: _____

BACKGROUND REVIEW

1. Describe your key responsibilities and accomplishments in your previous position(s).
2. What made you decide to leave your last position?
3. What certifications and licenses do you currently have? When do they expire? Describe your educational background (formal education, technical training, any additional training completed on the job/).
4. Tell me what was happening when you left your last position(s). Why did you leave? If downsized, how many people were affected?
5. What would your past/current employer have to do to keep you?
6. What was your favorite/least favorite part about your last position?
7. What do you expect your previous employers to say when we call to check your references?

MAKE READIES/SERVICE REQUESTS

1. Describe the types of Service Requests and maintenance requests you typically handled on your last job. How many did you handle on the average day?
2. What kind of interruptions did you encounter when you were on a call, or when you were in the field completing maintenance work? Pick an example of a common interruption you encountered, and tell me how you handled it.
3. What make-ready responsibilities did you have in your past position(s)?
4. What did you do to ensure the quality of your work?
5. Can you describe a maintenance or Service Request you had to perform strictly according to procedures?

KNOWLEDGE / SKILL ABILITY

1. What did you do to ensure the quality of your work?
2. What was your average response time to a Service Request?
3. What types of Service Requests do you find to be the most difficult to complete?
4. Describe the types of interactions you had with customers or residents in your previous position.
5. How much of your workload involved working with another member of the service/maintenance staff? Describe some of the projects or work you had to do with others.

TIME MANAGEMENT

1. Describe how you organize your typical workday. What methods or techniques did you use to make sure you accomplished all of your work?
2. How often did your work schedule get thrown off track because of an “emergency?” Give me an example of a time when you had to stop what you were doing to handle the emergency, and tell me how you handled the situation.

RESIDENT / CUSTOMER SERVICE

1. What would you say was your strength or talent when it comes to customer service? Describe for me a situation which reflects your use of that strength.
2. Describe the types of interactions you had with the office staff. Give me an example of a problem you may have had communicating with the office staff, and tell me how you handled it.
3. What was the most “stressful” interaction you have had with a customer or resident? What made that situation particularly difficult, and how did you handle it?

CURB APPEAL / AMENITIES

1. What were some of the more “boring” tasks you had to complete as part of your last job? How did you cope with the boredom of doing those tasks?
2. Give me some examples of work you did, or projects you undertook, which demonstrate your willingness to show initiative.

EMERGENCY / SAFETY

1. Describe some of the emergency situations you've had to deal with as a maintenance/service professional. What was the most serious situation you've faced, and how did you handle it?
2. What are some steps or precautions you have taken to ensure your own safety as well as the safety of others and of the business?

TEAMWORK / RELIABILITY

1. How much of your workload involved working with another member of the service/maintenance staff? Describe some of the projects or work you had to do in pairs or with others.
2. In what ways have you worked to promote "teamwork" with the others, including the office staff and the people who worked on the service/maintenance staff?
3. What were your work hours on your previous job? How many times were you late in the last year? What about other absences?

MOTIVATION / ATTITUDE

1. What would you do if your supervisor made a decision with which you strongly disagreed?
2. What do you expect from the company that hires you?
3. What are your career goals? Where do you want to be in 5 years?
4. In addition to everything you have told me, what else should I know about you?

SUMMARY

1. What do you think is the primary purpose of the service/maintenance area? How does the service/maintenance area contribute to the financial success of the business?
2. What else would you like me to know about you prior to my making this hiring decision?

TO CLOSE OUT THE INTERVIEW

- Tell the candidate about the position, and respond to any questions the candidate may have.
- Explain the next step in the hiring process, when you expect to make a decision, and how he or she will be informed of the decision.
- Thank the candidate.

Interview Guide—Groundskeeper

CANDIDATE: _____
DATE: _____
COMMUNITY: _____
INTERVIEWED BY: _____

BACKGROUND REVIEW

1. Tell me what was happening when you left your last position(s). Why did you leave? If downsized, how many people were involved in that?
2. What would your past/current employer have to do to keep you?
3. What was your favorite/least favorite part about your last position?
4. What do you expect your employers to say when we call to check your references?
5. What were some of the more “boring” tasks you had to complete as part of your last job? How did you cope with the boredom of doing those tasks?

KNOWLEDGE / SKILLABILITY

1. What types of things do you feel would be important to pick up off the grounds?
2. What areas of the grounds are the most difficult for you to clean?
3. How often do you think the grounds should be picked up?
4. Describe the types of interactions you had with customers or residents in your previous position.
5. How much of your workload involved working with another member of the service staff? Describe some of the projects or work you have to do with others.

MOTIVATION / ATTITUDE

1. What would you do if your supervisor made a decision with which you strongly disagree?
2. What do you expect from the company that hires you?
3. In addition to everything you have told me, what else should I know about you?

TO CLOSE OUT THE INTERVIEW

- Tell the candidate about the position, and respond to any questions the candidate may have.
- Explain the next step in the hiring process, when you expect to make a decision, and how he or she will be informed of the decision.
- Thank the candidate.

Notes:

Interview Guide—Housekeeper

CANDIDATE:

DATE:

COMMUNITY:

INTERVIEWED BY:

BACKGROUND REVIEW

1. Tell me what was happening when you left your last position(s). Why did you leave? If downsized, how many others were affected?
2. What would your past/current employer have to do to keep you?
3. What was your favorite/least favorite part about your last position?
4. What do you expect your previous employer to say when we call to check your references?

KNOWLEDGE / SKILL ABILITY

1. How many one (1)/bedroom apartments do you think you can clean in a day? Week?
2. What areas of an apartment are the most difficult for you to clean?
3. What products would you use to clean mildew and water buildup in a shower?
4. What do you find to be the most difficult cleaning requests to complete?
5. Describe the types of interactions you had with customers or residents in your previous position.
6. How much of your workload involved working with another member of the service staff? Describe some of the projects or work you had to do with others.

MOTIVATION / ATTITUDE

1. What would you do if your supervisor made a decision with which you strongly disagreed?
2. What do you expect from the company that hires you?
3. In addition to everything you have told me, what else should I know about you?

TO CLOSE OUT THE INTERVIEW

- Tell the candidate about the position, and respond to any questions the candidate may have.
- Explain the next step in the hiring process, when you expect to make a decision, and how he or she will be informed of the decision.
- Thank the candidate.

Notes:

Interview Guide—Painter

CANDIDATE: _____
DATE: _____
COMMUNITY: _____
INTERVIEWED BY: _____

BACKGROUND REVIEW

1. Tell me what was happening when you left your last position(s). Why did you leave? If downsized, how many people were involved in that?
2. What would your past/current employer have to do to keep you?
3. What was your favorite/least favorite part about your last position?
4. What do you expect your previous employers to say when we call to check your references?
5. What were some of the more “boring” tasks you had to complete as part of your last job? How did you deal with the boredom of doing those tasks?

KNOWLEDGE / SKILL ABILITY

1. Are you used to spray rig painting or rolling? How much experience have you had with both or either?
2. What experience have you had with two-color trim painting?
3. What experience have you had with texture painting?
4. Do you prefer indoor or outdoor painting?
5. Describe the types of interactions you had with customers or residents in your previous position.
6. How much of your workload involved working with another member of the service staff? Describe some of the projects or work you had to do with others.

MOTIVATION / ATTITUDE

1. What would you do if your supervisor made a decision with which you strongly disagreed?
2. What do you expect from the company that hires you?
3. What do you want to be doing in 5 years?
4. In addition to everything you have told me, what else should I know about you?

TO CLOSE OUT THE INTERVIEW

- Tell the candidate about the position, and respond to any questions the candidate may have.
- Explain the next step in the hiring process, when you expect to make a decision, and how he or she will be informed of the decision.
- Thank the candidate.

Notes:

The Resident Experience

Reference Guide



Customer Service Opportunities

Communication opportunities and timeframes

The following table shows the opportunities for communication that you may have with a resident from the time they are a prospect until the end of their residency, and the suggested timeframes within which to make this contact.

Type of communication/contact	Timeframe
Personal phone call and written follow up	within 24 hours of initial visit
Applicant approval/denial notification	Within 24- 72 hours of application for residency
Interim communication with resident to be sure they are moving into the apartment	prior to move-in day
Lease paperwork completion and explanation	prior to move-in day
Move-in orientation and Personal Apartment Inspection (contact at least 48 hours prior to move-in to confirm the appointment)	on move-in day
Follow up call or visit to the resident in their new apartment	5-10 days after move-in day
Follow up call after service request completion to determine satisfaction	48 hours
Informal resident survey by mail to assess their living experience to date	3-4 months prior to lease expiration
Lease renewal invitation by mail and notification of lease expiration	60-90 days prior to lease expiration
Follow up calls and contact	throughout lease renewal process
Communication with resident via newsletter and information notices	ongoing

Applicant Screening Criteria

How criteria are established

Criteria have limits determined by company policy and you are responsible for complying with company policy. It is recommended that company criteria for credit, income and employment be printed and posted where all can see them in the leasing office. Many companies give signed copies of the criteria to every applicant in order to avoid any misunderstanding about the screening process. The following table contains some suggestions.

Criteria	Possible Levels
What credit history will be allowed?	less than 50% with a 3 or higher; less than 40%
What income to rent ratio will be used?	33%, 30%, 35%, 40%
How much rental history is required?	12 months; 24 months
How much work history will be required?	12 months; 24 months
Will late rent payment history be allowed?	3 in 12 months; 2 in 12 months
Will NSF check history be allowed?	1 in 12 months; 2 in 12 months
Will owner debt disqualify an applicant?	Yes; No
What happens if just one category is poor?	Extra deposit; Guarantor Required
Will guarantors be allowed and at what income level will they be required?	Yes; No.
Will a personal bankruptcy disqualify an applicant?	Yes; No

Information About Co-Signers

When co-signers are allowed

- Some communities accept co-signers. Check your company's policy as to verification requirements and when co-signers should not be allowed. When co-signers are allowed, the person must often sign the lease agreement.

Note: On the lease agreement, the co-signer is usually listed as a party to the agreement, but not as an occupant. If not a party to the lease, a guarantee agreement can be used and should be notarized. A new agreement should be executed in the event of lease renewal or other material change in lease terms.

Verification required

The co-signer agreement must be verified to ensure that the person meets all rental criteria and has sufficient income to also include the applicant's rental obligation.

When the lease expires and the resident wants to renew, re-verify the resident's application to determine if the co-signer is still required. If so, the co-signer must sign the lease renewal and be re-verified. If not, the co-signer may be removed from the lease agreement.

When co-signers should not be allowed

Co-signers should not be permitted if the applicant fails to qualify because he or she has unacceptable rent history which may include:

- judgments from other apartment communities
- a late payment history
- eviction from a prior owner,

Consult your company policy and screening criteria when dealing with recent mortgage foreclosure actions.

Occupant Changes

Prepare for changes in resident occupancy

Collecting rent and managing occupancy are two of the most important responsibilities for a community manager. Therefore, preparing for and managing changes in resident occupancy is essential for maximizing income. This topic will discuss what you can do to effectively manage and enforce lease obligations when the occupants of an apartment home change.

Change affects the bottom line

Despite having carefully qualified and approved applicants and executed signed leases, you will find that it is not uncommon for situations and lives to change. Roommates can change. Managing these changes is necessary to protect the revenue sources for your community.

Legal clauses

One way to prepare for change is to use reasonable and legal clauses in the lease that will protect your interests.

- Use lease clauses that limit occupants and require the company's permission for subleasing or assigning. Most companies don't allow subletting.
 - Use a "joint and several" clause in the lease. This clause states that when two or more people sign the lease, each person is liable for paying rent and adhering to the terms of the agreement. If one resident cannot pay their share of the rent, or simply moves out, the other resident must still pay the full rent due. Also, each resident is responsible for any occupant's action that violates any of the terms of the lease.
 - Have all occupants of legal age sign the lease as lease holders and not simply permitted occupants.
 - Check company policy for how payments from roommates are handled. Is one payment for all occupants required or are individual payments accepted from each occupant for the combined rent and fees due.
-

New occupants

If adding a new occupant is allowed by the community manager:

- at least one original occupant should remain in the apartment.
 - the new occupant must meet all the qualifying guidelines for an occupant
 - the rental application should be completed and approved prior to the new occupant moving into the apartment, and
 - an application fee should be paid by the new occupant.
-

Continued on next page

Occupant Changes, Continued

Removing occupants

If removing an occupant is allowed by the community manager:

- at least one original occupant should remain in the apartment
 - all occupants should complete and sign an addendum to the lease stating that
 - the security deposit will not be refunded until all occupants move out
 - the remaining occupants will be responsible for the apartment and all damages
 - the moving occupant will have no further claim to the security deposit, and any concerns regarding the security deposit must be handled between the occupants, and
 - all keys must be returned by the moving resident, and
 - all lease terms should remain the same.
-

Community Policies

Example of policies

The table below shows examples of community policies that may be incorporated within the lease agreement or part of an addendum of community policies attached to and incorporated by reference.

Issue	Policy
Emergencies	<ul style="list-style-type: none"> • Call 911 first, and then notify the office. • Maintenance emergencies handled 24 hours a day. After hours, call the answering service.
Parking/Vehicles	<ul style="list-style-type: none"> • Vehicles cannot park in unauthorized areas. • Vehicles must have current license plates. • Vehicles not permitted without manager's approval include: <ul style="list-style-type: none"> ○ motorcycles ○ RVs ○ trailers ○ boats ○ jet skis, and ○ commercial vehicles. • Vehicles not permitted on the property include inoperable, unlicensed or abandoned vehicles. • Repair or washing of vehicles is not allowed without manager's approval. • Towing policies
Walls/Windows	<ul style="list-style-type: none"> • Hanging of objects from any balcony, windows or in front of any apartment unit is not permitted. • Residents cannot put anything on windowsills or balcony railings, and shall not permit anything to be thrown from the windows. • Mini blinds may not be removed without manager's approval. • Window treatments must have white backing to provide a uniform look. • Residents may use nails and non-adhesive picture hangers on the walls.

Continued on next page

Community Policies, Continued

Example of policies, (continued)

Issue	Policy
Appliances/Fixtures	<ul style="list-style-type: none"> • Equipment in bathroom and kitchen may only be used for the purposes they were intended for. • No throwing of glass, corn cobs, nut shells, fruit pits, bones or non-food in the disposal. • Portable washers, dryers or dishwashers not allowed without prior manager's approval.
Noise	<ul style="list-style-type: none"> • Residents and guests are required to control the volume of stereos, radios, television or other musical devices within the apartment and the community. Disturbance of residents in other apartments will not be permitted. • Residents are responsible for their guests at all times. • Large parties are forbidden.
Trash	<ul style="list-style-type: none"> • Trash must be deposited in trash containers located in the community. A fine may be charged to a resident if trash is left in hallways or other common areas. • Residents must abide by all local and state regulations regarding the sorting, separation and recycling of waste products, garbage and trash.
Grilling	<ul style="list-style-type: none"> • Charcoal and gas grills on the balconies or patios is not allowed where prohibited by local ordinance, and only allowed elsewhere when approved by management.
Lockouts	<ul style="list-style-type: none"> • Lockout service will be performed during office hours only, upon resident's presentation or proper identification.
HVAC Closets	<ul style="list-style-type: none"> • Residents may not place or store anything within two (2) feet of heating or air-conditioning closets or units. Local ordinances/codes must be checked and followed. • Many communities/cities do not allow storage of any kind in these closets. • Flammable materials may not be stored anywhere within these closets. Management reserves the right to inspect these areas.

Continued on next page

Community Policies, Continued

Example of policies, (continued)

Issue	Policy
Liquid Filled Furniture	<ul style="list-style-type: none"> Residents must maintain and provide the manager with evidence of current renter's insurance for waterbeds and other liquid filled furniture prior to the installation of such items. The insurance policy must cover the apartment community for damages.
Solicitations/Notices	<ul style="list-style-type: none"> Solicitations/Notices by residents or posting of any notices is prohibited without permission from management.
Amenities	<ul style="list-style-type: none"> Residents must adhere to the operating hours and policies of the amenity areas. Guests must be accompanied by a resident.
Trails/Paths	<ul style="list-style-type: none"> Any resident using any jogging or walking trail on or abutting the property after dark does so at his or her own risk.
Packages	<ul style="list-style-type: none"> Residents will allow management to accept packages from the post office and other carriers on behalf of the resident. The resident must show valid identification to claim the package. Packages not claimed after 7 days will be returned to the sender at the resident's expense.
Common Areas	<ul style="list-style-type: none"> The sidewalks, entryways, halls and stairways of the community will not be obstructed or used for any purpose other than ingress and egress to and from the apartment. This includes storage of personal property of any kind.

Continued on next page

Community Policies, Continued

Example of policies, (continued)

Issue	Policy
Swimming Pool	<ul style="list-style-type: none"> • Lifeguards are not provided by management. Residents and guests swim at their own risk. • Management is not responsible for accidents or injuries. • Children under [age] must be supervised by an adult when using the pool/spa. • The pool is for the exclusive use of residents. • No more than two (2) guests are allowed at the pool with any one resident. • Only unbreakable containers allowed in the pool area. • All trash must be deposited in the trash receptacle in the pool area. • No pets allowed in the pool area. • No diving allowed. • No alcohol is permitted in the pool area. • Regulation bathing suits must be worn at all times. • Gates must remain closed and latched at all times. • No radios or other musical devices may be played at volumes that would disturb others.
Pets	<ul style="list-style-type: none"> • No pets may be kept for breeding purposes. • Pets must be kept on a leash when outside. • Pets must be walked in natural or wooded areas. • Pet houses or crates are not permitted on patios, balconies or in common areas. • Pets are not permitted to be staked or chained outside the apartment. • All pet waste must be disposed of immediately and properly by residents. • Pets that cause noise complaints or display aggressive behavior will not be permitted to remain at the apartment community. • Pets (other than assistive animals) are not permitted in the club house, office, pool area, laundry room, or fitness center.

Continued on next page

Community Policies, Continued

Example of policies, (continued)

Issue	Policy
Satellite Dishes and Antennae	<ul style="list-style-type: none"> • The size of the satellite dish may not exceed one meter. • No satellite dish or antenna may be affixed on any common areas including, but not limited to, outside walls, windowsills, roofs, common area balconies, or stairwells. • No holes may be drilled through outside walls, roofs, balcony or patio railings, or exterior windows. • The satellite dish should be installed by a professional installer. • The satellite dish or antenna system must be a stand-alone system.
Garages and Carports	<ul style="list-style-type: none"> • Garages and carports are intended for automobile storage only. • No garage or carport is intended for storage of personal belongings. • Resident assumes responsibility for costs and expenses due to damage or theft of personal belongings stored in any garage or carport. • No smoke detectors or fire extinguishers are provided by management for garages or carports. • May also include information about: <ul style="list-style-type: none"> o garage rent o garage security deposit o access o insurance, and o vacating garages and carports.

Criminal Activity

Policy on crime Most properties will experience some kind of criminal activity, usually involving vandalism or noise complaints. All disturbances or incidents of crime must be dealt with immediately. Send the message to residents and guests that there is zero-tolerance for this behavior.

Resident-Resident disputes

Your responsibility

A resident's disruptive behavior should not be tolerated. A community manager may not know how to handle every situation and should never hesitate to ask for guidance from supervisory staff, legal counsel or the local law enforcement officials.

What you can do

Address and arbitrate (if possible) disputes among residents without delay. If management is aware of a potential danger to a resident or has been warned about disturbing behavior, any of the following actions may be appropriate:

- Initiate eviction proceedings against the resident involved in criminal activity. (Follow the policy in the lease if one exists for criminal activity.)
- Warn other residents. (The warning must be factual and as non-inflammatory as possible.)
- Call the police.

Respond quickly

Respond to complaints and concerns about residents quickly to manage inappropriate behavior. If management has been made aware of potential danger or discovered past criminal history and fails to react in a reasonable and timely manner, a victim may have legal recourse for recovering damages.

Domestic violence

Your responsibility

Noise complaints may be the first sign of domestic violence. Do not ignore these incidents of family arguments that can be heard outside the residence. Domestic violence is just as much a criminal activity as violence between unrelated individuals. It can be just as dangerous as well.

Continued on next page

Criminal Activity, Continued

Domestic violence, (continued)

What you can do

Do not attempt to arbitrate in a domestic dispute. Call the police when there is the threat of physical violence to anyone involved in the dispute. Enforce the policies restricting noise and criminal activity and take appropriate actions, including eviction. Consult local counsel for compliance with applicable domestic violence victim protection laws and potential fair housing implications in domestic violence cases.

Drug dealing

Your responsibility

Drug dealing is another area managers need to monitor within the residential area. If drug dealing is not acted upon, it could cause many legal and practical problems.

Managing resident activity carefully and preventing criminal activities are among the top priorities of a manager. Make sure you include a clause in the lease agreement that prohibits the use of and dealing of drugs or other illegal activities. Promptly evict residents who do not adhere to this lease requirement.

What you can do

Managers should know the warning signs of drug use and drug activity, and train employees to spot drug activity and to identify drug paraphernalia when in a resident's home.

Warning signs for drug dealing activities include:

- Increased traffic at a resident's home, especially at night and on weekends.
 - Frequent traffic at very late hours.
 - Frequent visitors with short or brief stays.
 - Visitors who leave one person waiting in the car.
 - Visitors who arrive with valuable objects, but leave without them.
 - Residents and guests sitting in their cars for extended periods of time.
-

Continued on next page

Criminal Activity, Continued

Drug dealing (continued)

Warning signs of drug use or manufacture in a residence include:

- smoking paraphernalia including rolling papers, rolling tray, “roach clip,” glass pipes
 - syringes
 - bags of white powder
 - unusual amount of plastic baggies
 - unusual number of baking soda boxes
 - sophisticated weight scales or pocket-sized scale
 - overwhelming scent of ammonia
 - appearance of a laboratory including glass vials, bottles, jugs, flasks, and
 - extremely bright or high-wattage light bulbs on all night.
-

Seek help from the authorities

If you or your staff suspects a resident or a guest is involved in criminal activity, do not confront them. Contact local law enforcement officials and explain the situation. They will instruct you on how to proceed. Consider yourself a partner with the local police department; you have a responsibility to report any suspicious behavior. However, do not confront the individuals yourself.

Never hesitate to call 911 in an emergency. When calling be prepared to explain:

- the type of incident
 - whether it is still in progress
 - location of the incident, and
 - description of people and vehicles involved.
-

Move-Out Inspection

Handling items left behind in an apartment

When walking an apartment after a resident moves out, do not remove any items from the apartment that were left behind. Some company policies do not allow employees to remove items without a resident’s permission.

Follow the steps in the table below to handle items left in an apartment.

Step	Action								
1	Immediately contact the resident.								
2	Use the table below to complete this step. <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">IF...</th> <th style="width: 50%;">THEN...</th> </tr> </thead> <tbody> <tr> <td>the resident tells you the items are trash</td> <td> <ul style="list-style-type: none"> • ask the resident to fax permission to throw away the items, and • throw away the items once the fax has been received. </td> </tr> <tr> <td>the resident tells you he or she wants to return for the items</td> <td> <ul style="list-style-type: none"> • take photographs of the items • place a tag on the bag so that the items can quickly be identified, and • store the items until the resident can return for them. </td> </tr> <tr> <td>you cannot reach the resident</td> <td> <ul style="list-style-type: none"> • take photographs of the items • make an inventory list of each item • place the item(s) in a bag, and • send the resident a letter to notify him or her that we are storing the item(s) and will hold them up to 30 days. </td> </tr> </tbody> </table>	IF...	THEN...	the resident tells you the items are trash	<ul style="list-style-type: none"> • ask the resident to fax permission to throw away the items, and • throw away the items once the fax has been received. 	the resident tells you he or she wants to return for the items	<ul style="list-style-type: none"> • take photographs of the items • place a tag on the bag so that the items can quickly be identified, and • store the items until the resident can return for them. 	you cannot reach the resident	<ul style="list-style-type: none"> • take photographs of the items • make an inventory list of each item • place the item(s) in a bag, and • send the resident a letter to notify him or her that we are storing the item(s) and will hold them up to 30 days.
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Continued on next page

Move-Out Inspection, Continued

Handling items left behind in an apartment, (continued)

Step	Action	
3	Use the table below to complete this step.	
	IF the resident... responds to the letter	THEN... <ul style="list-style-type: none"> store the items until the resident can return for them, <u>or</u> throw the item(s) out if the resident says it is trash and faxes you permission.
	does not respond to the letter	<ul style="list-style-type: none"> send another letter 30 days after the move-out to let the resident know the item(s) will be thrown away. <p>Notes:</p> <ul style="list-style-type: none"> Allow the resident a week to contact the office prior to actually throwing the item(s) away. If the property is not claimed and attempts to contact the resident have failed, the items may be thrown out, donated to charity or sold.

Security Deposit Disposition

Applying the security deposit to the last month's rent

Applying the security deposit to the last month's rent can be a problem since the condition in which the resident will leave the residence is unknown, and market conditions do not always allow the amount of the security deposit to be the same as a full month's rent.

If the security deposit is used as payment for the last month's rent, and the residence is left damaged, there will be no money to use on repairs or cleaning. The cost of the repairs will have to be absorbed or the resident will have to be sued. The best policy is to not allow the security deposit to be used for the last month's rent. This should be in the lease agreement.

When a resident wants to use a security deposit for last month's rent, the resident's non-payment or partial payment of the last month's rent can be treated as a case of rent non-payment like any other month. When this occurs, the community manager prepares and serves notice to pay rent or quit. If the resident doesn't pay upon receipt of this notice the appropriate legal steps should follow.

Reference: See the Toolbox for a sample Notice of Resident Intent to Terminate (Vacate).

Continued on next page

Security Deposit Disposition, Continued

Basic rules for returning deposits

The community manager is allowed to deduct from the security deposit whatever amount is needed to fix damages or restore unpaid rent. Many states have guidelines concerning this procedure. These guidelines vary from state to state, but usually give 30 to 45 days after the resident leaves to return the security deposit.

State security deposit statutes require the manager to send the resident's entire deposit or a written itemized account describing how the deposit was used for back rent, cleaning or damage repair. This is sent to the resident's last known forwarding address.

Promptly returning the security deposit with an itemized list of deductions and why they are necessary helps avoid future disputes with a resident. If there is no money to refund, an itemized list must still be sent.

Deductions for cleaning and damage

Disputes about the security deposit usually center on the deductions for cleaning and repairing the residence. Charges may be assessed for any cleaning or repairs necessary to make the residence available to rent. However, you should not deduct for the cost of ordinary wear and tear.

Reasonable deductions

Cleaning and repairs such as replacing stained or ripped carpets and drapes, fixing damaged furniture, cleaning excessively dirty kitchens and appliances, cleaning bathrooms or eliminating flea infestations. The question comes down to what is wear and tear versus what is the resident's responsibility. The general rules to follow are:

- Do not charge for conditions present at move in.
 - Do not charge for replacing an item when it can be repaired.
 - Consider the length of the resident's occupancy. It is difficult to collect for cleaning carpets, drapes and repainting walls when the resident has lived in the residence for more than one year.
 - Do not charge for cleaning if the resident paid a nonrefundable cleaning fee when he or she moved in.
-

Continued on next page

Security Deposit Disposition, Continued

Deductions for cleaning and damage, (continued)

- Charge fair prices for repairs and replacements. Security deposits should not be considered a source of revenue. Remember that much of our business depends on word-of-mouth referrals, and if the resident is upset it could potentially affect a positive referral.
- All charges deducted should have proper documentation, such as photos and repair receipts.

Painting

Painting, carpets and fixtures are also common areas of disagreement between residents and owners. The general rule is that if a resident has lived in the residence for less than a year, and the walls were freshly painted at that time, then the resident may be charged for the cost of cleaning or painting the walls. If the resident has lived in the residence for more than one year then the residence should be painted at the community's expense.

Rugs and carpets

If the carpet was new when the resident moved in then becomes stained and worn within months, it has been subjected to more than normal wear and tear and the resident may be charged for replacement. If the carpet was already worn at move in, and looks worse when the resident moves out, then that may be attributed to normal wear and the resident should not be charged for its replacement.

Fixtures

Furniture, fixtures or equipment that a resident physically attaches to the apartment are considered the property of the community. Residents are not allowed to remove these items when they move out. To avoid these problems, lease and rental agreements usually state that the resident is not allowed to make any changes to the residence without management consent. Examples of such fixtures include closet organizers, bookshelves or installed light fixtures.

Deductions for unpaid rent

Unpaid rent and utility charges can be deducted from a residents' security deposit. The following are common reasons for deductions from deposit.

Unpaid rent

When resident is behind on rent the community manager can deduct what is owed from the security deposit at the time the resident moves out. Using the deposit for unpaid rent during the tenancy is not recommended since there are other collection methods available while the resident dwells in the apartment home.

Continued on next page

Security Deposit Disposition, Continued

Deductions for unpaid rent, (continued)

Extended stay

The resident stays after the move out date. The rent can be prorated for the number of days the resident stayed and deducted from the security deposit.

Inadequate notice

Notice of less than 30 or 60 days, depending on the notice requirements in the lease, may require the resident to pay the full amount of rent for the balance of the notice period. If the apartment is re-rented during the notice period, most states will not allow charging the old resident for the period of occupancy by the new resident.

Fixed-term lease

If the resident moves before this type of lease has expired, the community may legally be entitled to the balance of the rent due under the lease, less any rent received for that period by the new residents. A termination fee (“buying out the lease”) may be allowed by the lease agreement, but such a lease agreement should be approved by company counsel and comply with local and state law.

Evictions

In many states, a money judgment will be issued after a court eviction, and the resident is ordered to pay rent through the date of the judgment. This allows the community manager to subtract from the security deposit the amount of the judgment and prorated rent from the date of the judgment to the time the resident actually leaves.

Deductions for damages and cleaning should be taken out of the security deposit first before anything else is deducted. The money entitled the community in the judgment can be collected through garnishing the resident’s paycheck in some states and other means, but damages and cleaning costs can sometimes only be received through the security deposit unless a separate court action is taken to collect them.

Timeframe for return

Security deposit refunds should be processed in a timely manner – within 5 – 10 days of move-out – so that state law requirements are met.

Most states require security deposit refunds or an explanation of charges against the deposit within 21 – 45 days. Some states require even earlier notice if any portion of the security deposit is being held.

Types of Property Management Systems

Property management

Web-based, browser-based or Windows-based property management software provides a centralized location for data where apartment managers, as well as corporate personnel, can instantly access information on:

- leasing
 - occupancy
 - screening
 - rent collection
 - facilities maintenance
 - accounting, and
 - purchasing.
-

Billing management services

Billing management can be handled at the site level. Property management companies can bill and collect for utility services (for example, water and trash services) not paid directly to the provider by the resident.

Improving the bottom line

Billing management services can help improve the bottom line by:

- recapturing income lost through inefficient billing practices
- reducing energy/water consumption
- eliminating substandard meters that cost money
- reducing billing costs with the simplicity of an “all-in-one” bill, and
- getting payments to properties faster.

Improving resident service

Billing management services can help improve resident service by:

- combining all resident charges on a single, convergent bill
- recapturing the hours that staff now spends on billing, collections, and move-outs
- maximizing and accelerating resident utility collections, and
- sending monthly messages to residents.

Built-in utility charge calculations

Billing management services offer built-in utility charge calculations, such as:

- RUBS (Ratio Utility Billing System) water and energy charges
 - sub-metered or allocated water and energy meter-reading and charge calculations
-

Continued on next page

Types of Property Management Systems, Continued

Billing management services, (continued)

- other utility fees (for example, trash pickup), and
- vacant unit cost recovery for electric service.

Revenue/Yield management

Yield/revenue management systems use detailed past and present data to forecast key variables like supply, demand, and economics to make pricing decisions based on current and future market conditions. Software can offer optimal terms for any possible unit, lease term and move-in date allowing flexible terms that work best for both the community and the resident. Computers evaluate every data point to make pricing decisions and calculate ideal rent by managing the weight of each data point rather than by intuition or perception. Human error and/or possible fair housing violations are minimized and staff can focus more on customer service.

Factors analyzed:

unit availability
 competitive influences
 current and historical lease activity
 move in dates
 current market dynamics
 lease duration
 projected demand
 how long units have been available
 likelihood of resident renewal
 possibility of economic strengthening or continued decline

Make ready and maintenance management

Apartment managers have instant access to information, allowing sites to speed up the process of servicing resident requests, expediting the make-ready process, and regularly scheduling routine preventive maintenance to keep properties running in top form.

Mobile work orders/Pocket PCs

Equipping maintenance staff with Pocket PC devices that store daily service requests helps them stay in the field more and in the office less. This equates to higher technician efficiency and utilization, and more importantly, satisfied residents because issues are responded to in a more timely manner.

Continued on next page

Types of Property Management Systems, Continued

Make ready and maintenance management, (continued)

Maintenance analysis reports

Instant access to maintenance reports helps management know which maintenance technicians are performing at the highest efficiency and are the most utilized. The reports also identify other personnel that may need additional training in certain maintenance areas, based on their service request completion times or rework percentages.

Spanish capability

Providing a Spanish version of mobile service requests allows Spanish-speaking maintenance staff to perform their jobs with comfort and ease. It allows them to use their primary language to perform their jobs and minimizes the communication gap of having site management translate everything or train them in how to use the application.

Community Web pages

The Internet has become the number one resource for marketing and advertising the community. As more people go online for information about apartment communities, it's a necessity for properties to have a presence on the Web.

Standard components

The Web site should be simple, functional, and easy to use. Not all computers have the software programs to run the "sizzle" that some Web designers may want to provide. Avoid trying to provide too much.

A basic Web site for a community should include:

- templates and color schemes that brand the property
 - unit level rents and availability information
 - lists of amenities
 - photographs
 - floor plan images
 - site plans
 - maps with directions
 - guest cards, and
 - links to Internet Listing Services.
-

Continued on next page

Types of Property Management Systems, Continued

Community Web pages, (continued)

Advanced features

An increasing number of apartment communities have advanced features such as:

- real time pricing and availability
 - online leasing
 - online rent payment, and
 - online service requests.
 - Video tours of the community
-

Resident portal

A resident portal can make residents feel as if they are truly a part of the community—a big factor in retaining them. Residents have choices and these tools can provide improved service satisfaction. Resident portals free onsite personnel from some cumbersome paperwork, increase resident retention, and give prospective residents, another avenue to your community. The resident portal can be used to:

- create an online service request as well as check on its status
 - make an online rent payment
 - post newsletters
 - post announcements
 - post policies, and
 - allow residents to reserve rooms/facilities.
 - Communicate on line
-

Online leasing reservations

Using the Internet, potential residents can access the following functions to reserve apartments online.

- Fill out a guest card online with the prospective resident's preferences, such as move-in date, price range, number of occupants, and number of bedrooms.
- Identify an available unit with the right amenities, price and lease terms
- Complete the lease application.
- View special offers at the point of lease and pay application fees.
- Submit a credit application for processing. When it has been completed, the electronic information can be processed through a screening vendor.

Once the prospect has passed the screening requirements, all that is left to do is sign the lease, pay the necessary deposits and fees, and pick up the keys.

Continued on next page

Types of Property Management Systems, Continued

Call center

Calls to the leasing office, whether resident service requests or prospect inquiries, may be handled by the on-site leasing staff. Surveys indicate that more than 30% of phone calls are missed because the staff was just too busy to answer the calls – or the call came in after business hours. Other survey results indicated that the leasing professional asked for an appointment with only 61% of qualified callers and only 23% resulted in a specific appointment.

A call center, staffed by highly trained apartment leasing professionals who receive on going training for their job responsibilities, can provide critical backup to on-site leasing professionals. A call center:

- works as an extension to your existing leasing staff
 - creates the impression for a prospect that the call was answered directly by a leasing professional in the community's leasing office
 - helps capture prospective leads and converts more of those into leases, and
 - schedules appointments for the prospect to visit the community.
-

Questions to ask before hiring a call center

The “Professional Apartment Management” newsletter suggests that you ask the following questions before hiring a call center.

- What training do call center employees receive and what experience do they have?
 - How are call center employees paid? Do they receive straight salary or are incentives available?
 - What monitoring systems are in place to track employee performance at the call centers?
 - Is the call center able to answer e-mail inquiries and in a timely manner?
 - Does the call center have the capability to provide guest card information to your community's property management software? Can it send the information to your leasing office electronically?
 - Are all phone calls into the call center recorded and available for review?
 - Can various advertising methods used to drive traffic be tracked and reported using individual toll-free numbers?
 - How will the call center go about learning information about your community so that the same quality of information available onsite is part of their knowledge?
 - Does the call center have the interface capability with your property management software to get current, real time availability information.
 - Do call center employees receive fair housing training?
-

Continued on next page

Types of Property Management Systems, Continued

Purchasing

Purchasing management systems improve the efficiency of purchasing processes. They address industry concerns such as inconsistent sourcing practices, inefficient paper-based invoicing and payment procedures, and an inability to leverage the power of volume purchasing.

The ultimate goal of using purchasing management software is to buy all goods and services from single source: a Web catalog generated and maintained by the company.

Centralized Invoice Processing

One of the key benefits of purchasing management systems is centralized invoice processing, which streamlines invoicing from procurement to payment. For each purchase, an electronic invoice is coded automatically, verified against the agreed-upon pricing, and then interfaces directly with the accounts payable system.

Other Benefits

In addition to centralized invoice processing, Purchasing Management Systems also:

- Track bidding, purchasing and payment for services and materials used at the property level
- Compare practices and results at various properties and on a company-wide level
- Standardize the quality and consistency of goods and services
- Monitor and track supplier use and adherence to negotiated pricing
- Simplify the ordering of goods and services through templates for commonly used items
- Consolidate spending to take advantage of volume discounts
- Monitor the property's compliance with company guidelines and standards

These features combine to reduce the overall costs of purchasing both at the property and company levels.

In Practice

One company that introduced its own purchasing management system reported more than 2500 vendors, with only 12% of those vendors accounting for 80% of the company's expenditures tracked through their system. The system has saved them over \$4 million in the past three years.

Numerous companies, from small regional operators to large national firms, have reported savings from electronic procurement systems from 10 to 12 percent overall – not including reduced staffing needs, more consistent purchasing practices, tighter expense controls and quicker turnaround.

Continued on next page

Types of Property Management Systems, Continued

Electronic payments

Apartment managers may want to offer alternative ways for residents to pay rent, and to receive payment more quickly.

ACH

The Automated Clearing House (ACH) network is a processing and delivery system that provides for the distribution and settlement of electronic credits and debits among financial institutions. Through a nationwide telecommunications network, each ACH operator is able to communicate with other ACH operators to exchange entries quickly and efficiently, regardless of geographic distances involved. The ACH network is governed by operating rules and guidelines and offers an assortment of technical formats that can be used for a variety of payment applications.

Credit card

Bank cards may be a credit card or debit card and, in some cases, both. Bank credit cards are generally issued by a financial institution under license by a national credit card organization. Credit cards are not true payment instruments because they do not result in a direct transfer of funds from the payer to the payee. Practical experience to date indicates that residents are using credit cards where accepted for one-time events, rather than monthly rent, such as security deposits and initial fees like application and administrative fees.

Some owners feel that accepting cards is a competitive advantage even with a low usage rate. They believe automatic rent payments with credit cards provide more efficient cost savings in time and manpower spent on check processing. However, a recent survey by ApartmentGuide.com ranked acceptance of credit card payments for rent as at the bottom of the list of the most important amenities for future residents. Reputation of the community, laundry facilities, proximity to employment, cable or satellite TV, floor plan variety, high speed Internet, professional landscaping, swimming pool(s), and pet policies all ranked as more important in the minds of potential residents. Reward points are more important to the high-end renter.

The most important detriment to the use of credit cards is that residents are often charged a transaction fee. Some owners absorb this cost as a competitive offering in the marketplace.

Check 21

The Check Clearing for the 21st Century Act (Check 21) was signed into law on October 28, 2004. Check 21 legalizes a new negotiable document that includes an image of the front and back of the original paper check. This substitute check also referred to as an Image Replacement Document (IRD) can be processed in the same manner as the original check and is considered its legal equivalent.

Sample Notice of Crime Incident Letter

DATE

To the residents of the xxxxxxxx Apartments,

We wanted you to be aware of an increase in criminal activity at our property. Over the last several weeks we have had several reports of auto break-ins and, more recently, threatened assaults of drivers exiting their vehicles. These incidents are occurring during both daylight and evening hours. The police have been notified and affected individuals have filed police reports. We wanted you to be aware of this criminal activity on our property and remind you to always take whatever precautions you feel are necessary to ensure the safety of yourself, your family, friends and possessions.

We urge you, your family, co-residents, occupants and visitors to be as careful as possible for your own safety and security. If a crime is suspected or occurring or even if suspicious persons are spotted on the property, you need to contact the police immediately by calling 911. Failure to do so could result in crucial delays. After first notifying the local law enforcement authorities, you should then contact our management office.

No one can ensure your safety. Please remember that your security is your responsibility and that of the local law enforcement agencies.

Sincerely,

Ima Cam
Property Manager

Hand delivered on Thursday, DATE