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# Resident Services

## Coordinator

### System Manual



#### Purpose Statement:

To improve the lives of real estate investors and residents through property management solutions.

## Systems Resident Services Coordinator (RSC)

### KRA's – Key Result Areas

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### **Templates:**

#### **1. Residents**

- a. New Resident Welcome E-mail
- b. Receipt of Check-In Sheet - Email
- c. Security Deposit Protection Program Enrollment Spreadsheet
- d. Misc Resident Letters - FOLDER
- e. Lease Assignment Checklist
- f. Request for Lease Assignment
- ff. Request for Lease Assignment.pdf (same as 1h, but saved in pdf format)
- g. Lease Assignment Form
- h. Reletting Procedures Letter.docx
- hh. Reletting Procedures.pdf (same as 1j, but saved as in pdf format)
- i. Lease Assignments Completed – Folder
- j. Request for Pet Approval
- k. Quarterly Filter Change EM

## 2. Turnovers

- a. Notice To Vacate.docx
- aa. Notice to Vacate.pdf
- b. Security Deposit Return Form
- c. Turnover Checklist
- d. Vacant unit inspection form
- e. Resident Confirmation of NTV – EM
- f. Move Out Letter.docx
- g. Property Coming Vacant – Owner Letter
- h. Property Coming Vacant – Owner EM

## 3. Resident Welcome Packet

- a. Check in Sheet Form
- aa. Check in Sheet Form.pdf
- b. Welcome Letter
- bb. Welcome Letter.pdf
- c. Citizen Home Solutions Flyer
- d. Avoid Being Scammed Letter
- e. Renting vs Buying

## 4. Lease Renewals

- a. Residential Lease Rental Agreement Extension.pdf
- aa. Residential Lease Rental Agreement Extension
- b. Residential Lease Renewal -Letter
- c. Lease Renewal E-Mail
- d. Non-Renewal Policy
- e. Renewal Spreadsheets
- f. Completed Lease Renewals
- g. Renewal Lease Fee Invoice
- h. Month-to-Month Resident Notification - Email
- i. Owner Renewal Notification – Email
- j. Owner MTM lease notification – EM
- k. Receipt of Renewal to tenant – EM
- l. Renewal checklist
- m. MTM Rate Increase Letter

## 5. Other

- a. Behavioral Values
- b. Office Policy
- c. PE - Resident Services Coordinator
- d. Letterhead
- e. Passwords
- f. Reoccurring Monthly Calendar
- g. Utility transfer forms – Folder
- h. Toner List

- i. Incident Report Form
- j. Office Supply List
- k. Grace Management Birthdays

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## **Position Overview - RSC**

The Resident Services Coordinator will report to the Vice President of Operations.

As the RSC will be the 'face of Grace Management' for most residents, the RSC shall conduct themselves in a friendly, helpful, and professional demeanor at all times. Whether dealing with residents, owners, vendors or other Grace Management team members a high degree of customer service, empathy, and an overall friendly demeanor is absolutely necessary.

## **System Manual Overview:**

The system shall run the business, and the team members shall run the system. Systems are simply road maps or instructions that allow the Grace Management processes to be repeated and easily duplicated.

Property management done on a large scale is an extremely complex business with many moving parts. In order for Grace Property Management to be successful, it must be consistent.

The purpose of the system manual is to provide a consistent and specific way of doing business, and to ensure that each property, resident, owner, and as much as possible, each situation, are treated the same. Also, to define HOW Grace Property Management will do property management.

The System Manual will provide each team member with specific KRA's (Key Result Areas) for which they are responsible and a specific measure of success for each KRA, so that each team member always knows whether or not they are succeeding.

Team members should always refer to their specific system manual to determine the answer to a question before bringing that question to the Director of Operations.

Any deviation outside of the system must be recognized as an exception to the system. While exceptions are necessary from time to time, each exception is by nature inefficient, and should therefore be avoided.

Each team member shall constantly work to improve the system. One purpose of the monthly Performance / Evaluation meeting with the Director of Operations is to ensure that on-going system improvements are suggested, discussed and implemented.

## **1- Open Office / Greet Office Visitors**

**Measure of Success: Greet each visitor immediately as they enter the office and make eye contact**

1. The RSC is the first person a visitor will see and therefore makes the first impression – which is VERY important.
2. Each morning the RSC shall open the office as follows:
  - a. Open the blinds
  - b. Unlock the back-file drawers
  - c. Unlock the front storage closet
  - d. Turn on all lights
  - e. Ensure the front desk business card holder is fully stocked with cards for each team member and replenish as needed to keep it filled daily.
  - f. Thermostat should be preset. If not, the adjust thermostat settings to 72 at open and change to 68 at close. Turn the Air conditioning off at the end of the day in the summer.
  - g. Unlock the main Yorkshire building door. (the double doors entrance)
3. At the end of each day the RSC shall “close the office” repeating each of those procedures. Please note the RSC doesn't need to lock the main Yorkshire doors at the end of the day. This is completed by the janitorial company.
4. As a person enters the office greet them in a friendly, professional and respectful manner. The RSC will ensure that everyone feels welcomed and appreciated.
5. If a resident is paying rent:
  - a. Confirm their payment has the property address written on it. If not, ask them the property address and write it on the memo line and accept the payment.
  - b. Do not offer a receipt but create one if they ask. To create a receipt, take a photo-copy of the check, date and sign the copy and give it to the resident.
  - c. If the resident wants to know their rent balance, look it up in AppFolio.
  - d. If they wish to discuss a balance due they should speak with the Director of Accounting (DA).

- e. No cash is to be accepted. No two-party checks are to be accepted. Acceptable payments are personal check, money order, cashier's check or paying through their tenant portal.
  - f. Once a payment has been received, IMMEDIATELY secure the payment by placing it in the DA's rent box.
6. If a solicitor enters the office, **nicely & professionally** inform them that this is a 'no soliciting building'.
7. If a non-resident (owner or other visitor) asks to speak with a Grace Management team member, ask their name and call the team member to inform them they have a visitor.
- a. Offer the visitor a cup of water or coffee.
  - b. When showing a visitor to a team member's office, physically walk them to the office. Never allow a visitor to walk themselves to a team member's office.
8. If a visiting current resident wants to make a repair request:
- a. If they are not able to make that submission for any reason, then the RSC should submit the request through Appolio on behalf of the resident.
  - b. Inform the resident that they should initiate future requests through their tenant portal or call the maintenance phone line if they do not have internet access.
9. If a visitor enters the office and asks to fill out a rental application:
- a. Call the Director of Leasing (DL) and confirm the property is still available.
  - b. If the DL is in the office, they will greet the individual and advise them they can apply online. If they can't do this this will give them an application to fill out.
  - c. If the DL is NOT in the office, the RSC should advise the visitor they can apply online or give the visitor an application and assist them in completing & answer any questions.
  - d. Once the application is complete, review the application to be sure it is filled out fully and completely.
  - e. Place the completed application and application fee in the in-box of the DL

10. If desired, lunch should be taken in coordination with a time that the DL can provide front desk coverage.
  - a. When the RSC goes to lunch, plug in the front door ringer by the desk of the DL.
  - b. If the DL is not in the office, the front desk duties then fall to the DA or whom is position upfront.
  - c. Verbally inform the DL that you are going to lunch and they should now cover the front desk until you return.
  - d. When you return verbally inform the DL that you are back and remove the door ringer from the outlet and place back in the storage closet.
11. We never want a visitor to enter the office and have to wait or 'announce' that they are in the office because we didn't realize it.
  - a. Anytime the RSC steps away from the front desk to a place they will not be able to see or hear if someone enters the office (even if it is just for a minute or two), inform the DL that you are stepping away and ask them to cover the front desk for that time period.
12. Anytime that anything is received from a visitor to the office, including a letter, package, key, check, power of attorney, etc. the RSC shall record the following information from the visitor:
  - a. Name of person leaving the package
  - b. Date and time, it was left
  - c. Persons phone number
  - d. Property address pertaining to the info left
  - e. Which team member the info is for
  - f. Take the package and info to the appropriate GM team member
13. If a Yorkshire Plaza tenant enters the office, they should be referred to the Commercial Property Manager's Assistant or the CPM.



14. If the Commercial Property Manager is unavailable and a Yorkshire Plaza tenant is locked out, review the contact info for that suite. The contact information can be found in AppFolio. Ask the tenant their name and for their ID. If the tenant isn't the main contact for the suite, call the main contact to inform them that a tenant is requesting to be allowed into the suite. If the contact approves take a copy of the tenant's ID and walk them to the suite to allow them in. If unable to get in touch with the main contact inform the tenant that you must hear from them prior to allowing them in.
  - a. Place copy of ID on key log with a note of which property it pertained to and a date with your initials.
  - b. End of year these can be removed and shredded.

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## **2- Receive and distribute mail to office team members**

**Measure of Success: Distribute mail daily within 2 hours of receipt.**

1. Receive the mail from the mail person daily and open mail immediately.
  - a. Accept mail, UPS, Fed-X, ect., for Yorkshire Plaza tenants who may not be present at the time of delivery.
  - b. If mail is received for a Yorkshire tenant, call the appropriate tenant, and inform them we are holding a package for them.
2. As rent checks are received by mail it is important to remove those from the mail and immediately place all payments in the rent inbox located on the desk of the DA.
  - a. Do not remove any payments from the envelope, rather place the entire envelope (with the check still inside) in the rent inbox of the DA.
3. Distribute mail to each team member immediately after receipt.
  - a. Email all vendor invoices to AA (Admin Assistant) via Billing@RentGrace.com.
  - b. Give all resident payments to the Director of Accounting (DA).
  - c. Give all utility billings to the appropriate Property Manager (PM).
  - d. Give all other mail to the appropriate GM team member, as it is addressed on the envelope.
  - e. Give all vendor marketing material to the VPM.
  - f. Leave all banking and any other confidential looking material in the sealed envelope when you give to the VPO. These items will be in Grace Management's name.
  - g. Leave all banking and any other confidential looking material in the sealed envelope for Mac Real Estate. Give these to Marc.
  - h. Give all HOA and loan bills due to the AP for them to process and pay.
  - i. Leave all return to sender mail in sealed envelopes and give to the VPO.
  - j. Give all Property Tax related documents to Marc
4. At the end of each week the will-call box should be reviewed.

- a. If an item is outstanding return it to the PM or call the person who is supposed to pick up the item. No item should be left in this box longer than 1-2 months without a valid reason. If there isn't a reason and a PM is not involved, dispose of the item properly.

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### **3 – Resident Relations**

#### **Measure of success: Receive one compliment and no complaints monthly.**

1. If a residential resident has a request, complaint, problem, or other issue **NOT** relating to maintenance or payment issues, it is first the responsibility of the RSC to try and resolve the issue.
  - a. If a resident has a complaint about maintenance such as “This is my 2nd request / I have not heard back from anyone” the RSC should take ownership of the issue and get it resolved. Get all of the specific info from the resident, report it to the Property Manager (PM) AND follow up with the resident for a resolution. The VPO & VPM should be cc’d on all e-mails that are reported as “2<sup>nd</sup> request”.
  - b. If the resident asks about breaking their lease, the RSC should give the resident the NTV template explaining how to break your lease (2.a).
  - c. If the resident has rent payment questions or problems, the call or e-mail should be forwarded to the DA.
2. ALL commercial tenant questions or issues should immediately be passed to the CPM’s assistant or CPM. The RSC shall operate as a ‘pass-through’ for all commercial related questions or inquiries. The RSC will however act as a team player and help show all interested parties’ properties for rent (via the iPad in storage, the individuals personal device etc.) regardless of if they are residential or commercial if the appropriate team member is unavailable to assist.
3. Make every effort to resolve all resident requests, disputes or issues between residents / neighbors.
  - a. If the dispute / issue escalates or you feel you are not able to resolve the issue, pass the issue to the PM.
  - b. The resolution of any issue should follow the terms of the Lease Agreement. If the lease agreement does not address the issue, refer to the Grace Management System Manual. If neither the Lease Agreement nor the Grace Management System Manual addresses a particular issue, see the PM.
4. Any resident issues that are HOA related will be handled by the PM.
5. Any fact related questions from residents should be directed to and handled by the RSC. Fact related questions are those questions that relate to items such as: