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# Inspection Coordinator

## System Manual



### Purpose Statement:

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

**KRA's – Key Result Areas**

- \* Position Overview / System Manual Overview – p3
- 1. Property Inspections – p4

**Templates:**

**1. Office Docs**

- a. Behavior Values
- b. Office Policy

**2. Property Inspections**

- a. Resident Call Script
- b. Resident Notification of Property Inspection – EM / Phone
- c. Inspection Template Report
- d. Exception Property List
- e. Inspection Invoice Template
- f. Resident Inspection Completion letter
- g. CO Detector Install Invoice Template
- h. Detailed Property Survey
- i. Completed Inspection – FOLDER
- j. Inspection Scheduler
- l. Resident EM – Charges to Account

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## **Position Overview – Inspection Coordinator (IC)**

The IC will report to the Vice President of Operations.

### **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 measures 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.

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## 1 – Property Inspections

**Measure of Success: Fully complete the weekly inspection process on no less than 10 properties by end of business day each Friday.**

1. All properties must be inspected one time per year.
  - a. The annual property inspection may be the only time per year that some residents have personal contact with the Grace Management office. Therefore, it is important that the IC have a high degree of customer service, be friendly and professional, and leave a good impression on the resident.
  - b. All inspections will be performed by the IC. The IC's main area of responsibility is the Denver Metro area. Should a property fall outside of this area, it will become the PMs responsibility to complete. The Exception is if more than one property falls into the same area outside of the Denver metro area, the IC will complete the inspections. If the PM is to complete an inspection, the IC will inform the PM when they need the inspection completed. The IC will insure all steps are followed to complete the process in full.
2. Inspections are to be completed one time annually on each residential property but NOT under the following two conditions:
  - a. If the resident has been in the property less than 90 days.
  - b. If the resident has submitted a notice-to-vacate.
  - c. If the PM does NOT want the unit inspected. The PM will denote this by replying back to the IC's schedule email.
3. Before initiating contact with the resident start a property inspection report through Appfolio (following the layout of template 2C).
  - a. Start a new inspection report. <https://help.appfolio.com/s/article/Start-a-New-Inspection>
  - b. Choose existing inspection as template and choose the property 2200 E. 104<sup>th</sup>.
  - c. Title the inspection name as the PMs name, the property address & the initials of the inspector. (exempld: Jessica Burrow 717 Mockingbird St MJR)
  - d. Inspection date should be the date the inspection took place.

4. Confirm the GM office has a key. If we do not have keys call the resident to arrange a time to perform the inspection. Don't alarm the resident that we don't have the key.
  
5. Call residents a minimum of 7 days prior to the inspection date to schedule the date and time with the residents to access the property.
  - a. When leaving a phone message or when explaining the purpose of the inspection, refer to "Resident Property Inspection Explanation" (template 2a).
  - b. If you are unable to personally speak with the resident by phone, leave a voice message and then send an e-mail or text.
  - c. The resident(s) are welcome to be present, but they do NOT need to be present at the inspection. Give them the date and time (in a 1-hour window) of the inspection.
  - d. Inspections should be scheduled Tuesday and Thursday each week, during business hours. When scheduling, try and be somewhat flexible with the resident in order to schedule the inspection during a time that is convenient for them as well as the IC. HOWEVER – the inspection schedule must be followed in order to be efficient for the IC and so the IC is able to complete all inspections each day as their schedule allows.
  - e. If the resident opts to NOT be present for the inspection, make sure they lock up any pets that are on the property.
  - f. When leaving a phone message for the resident, leave the date and time that you will be performing the inspection.
    - aa. Give the tenant a 1-hour time window so that you have some flexibility in your inspection day in case you encounter delays.
    - bb. Inform them by e-mailing (ALL e-mail addresses that we have on file) using the 'property inspection resident e-mail (template 2B).
  - g. Inform the resident that the property inspection should take approx. 20 minutes.
  - h. Once the inspection is scheduled, call or text the resident the day before the inspection to 'remind' them of your appointment.

6. In preparation for the inspection bring the following:
  - a. Property Condition Inspection report started in AppFolio
  - b. Residents contact information in case they are not at the property at the scheduled time, so you can call them by phone from the property if necessary. Can find this through AppFolio.
  - c. Ipad as provided by Grace Management. Ensure the Ipad setting is set to low level for 'e-mail' size pics. This will allow photos to be uploaded faster and more efficiently into AppFolio.
  - d. Pepper spray as provided by Grace Management
  - e. Current key to the property
  - f. Have extra Co detectors on-hand in case you need to install any. Take tool box to complete install.
  
7. Arrive promptly at the scheduled time.
  - a. If you are running more than 5 minutes late call the resident by phone (or text them) to inform them.
  - b. Always knock loudly AND ring the doorbell multiple times before accessing a property even if the resident said they do not plan to be home for the inspection.
  - c. If the resident answers, greet them in a friendly and professional manner and thank them for their time.
  - d. Before you begin, ask the resident if it OK for you to walk through the property.
  - e. When entering a property, you suspect to be vacant, loudly say: "HELLO I'M WITH GRACE MANAGMENT, IS ANYONE HOME!?" as you are unlocking the door, as you are entering the property, and as you enter different areas of the home.
  - f. Never assume a property has no one home, even if the resident said that no one would be home.
  
8. Safety is a goal while conducting the inspection.
  - a. If while scheduling the inspection the resident makes you feel uncomfortable or threatened in any way – DO NOT schedule the inspection. Notify the PM of your concern.