

Resident Services Coordinator System Manual



Mission Statement:

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

Systems Manual: Resident Services Coordinator (RSC)

KRA's – Key Result Areas

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Templates:

1. Residents

- a. New Resident Welcome Letter.pdf
- b. New Resident Welcome E-mail.docx
- c. Name Affidavit
- d. Receipt of Check-In Sheet - Email
- e. Security Deposit Protection Program Enrollment Spreadsheet
- f. Misc Resident Letters
 - aa. Back-bill tenant electric
 - bb. Back-bill tenant water
 - cc. Cable TV install letter
- g. Lease Assignment Checklist
- h. Request for Lease Assignment
- hh. Request for Lease Assignment.pdf
- i. Lease Assignment Form
- j. Reletting Procedures Letter.docx
- jj. Reletting Procedures.pdf

2. Lease Renewals

- a. Residential Lease Renewal Form
- b. Residential Lease Renewal -Letter
- c. Lease Renewal E-Mail
- d. Non-Renewal Policy
- e. Renewal tracking Spreadsheet
- f. Completed Renewal Spreadsheet
- g. Lease Fees Due GM - Folder
 - aa. New Lease – Percentage charge
 - bb. New Lease – Flat charge
 - cc. Lease Renewal
- h. Month-To-Month Resident Notification - Email
- i. Owner Renewal Notification – Email
- j. Owner MTM lease notification – EM

3. 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
- ff. Move Out Letter.pdf
- g. Property Coming Vacant – Owner Letter
- h. Property Coming Vacant – Owner EM
- i. Google testimonial request

4. Other

- a. Behavioral Values
- b. Office Policy
- c. Performance Evaluation – RSC
- d. Letterhead
- e. Fax Cover Sheet
- f. Reoccurring Monthly Calendar
- g. Utility transfer forms
 - Broomfield Water.pdf
 - Northglenn Water.doc
 - Firestone Water.pdf
 - South Adams County Water.pdf
 - United Power

- _ Xcel ATO Form
- _ Xcel ATO Multi-Properties
- _ Xcel Energy New Occupant Form.doc

- h.
- i. Key Check out log
- j. M/R Re-invoice
- k. Market rate schedule
- l. Incident Report Form
- m. Real Agent Guard instructions
- n. Password list

SAMPLE

Position Overview - RSC

The Resident Services Coordinator will report to the Director 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 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.

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. Turn on the front desk i-pad. Code is 1-2-3-4 and the network is “wireless”
 - c. Unlock the back file drawers
 - d. Unlock the storage closet
 - e. Turn on all lights
 - f. 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.
 - g. Adjust the thermostat setting to 70 at open, and change to 65 at close.
3. At the end of each day the RSC shall “close the office” repeating each of those procedures.
4. As a person enters the office greet them in a friendly, professional and respectful manner.
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 write one if they ask. To prepare a receipt, enter the info in a receipt book and give them a copy.
 - c. If the resident wants to know their rent balance, look it up in the Prop Mgr software on the tenant window.
 - d. If they wish to discuss a balance due they must 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, cashiers check. **Cash MAY be accepted for application fees.**
 - f. Once a payment has been received, IMMEDIATELY secure the payment by placing it in the 'rent-payment in-box' on your desk.
 - g. At least twice daily take all payments from your 'rent-payment-in-box' and place them in the 'rent-payment-in-box' of the DA.
6. If a solicitor enters the office, **nicely** 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 bottle of water.
 - b. When showing a visitor to a team member office, physically walk them to the office.
8. If a visiting current resident wants to make a repair request:
- a. Invite them to submit the request through the GM i-pad self-service center.
 - b. If they are not able to make that submission for any reason, then the RSC should submit the request through the www.rentgrace.com site on their behalf.
 - c. Inform the resident that they should initiate future requests through the web site 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 give them an application to fill out.
 - c. If the DL is NOT in the office, the RSC should give the visitor an application and assist them in filling it out if they have questions.
 - d. Once the application is complete, review the application to be sure it is filled out fully and completely.