

**Appendix  
Exhibits**



# List of Exhibits

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- Exhibit 1.3 – Manual Request for Check Form
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<b>List of Exhibits for Chapter 1</b>
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**Exhibit 1.2 Referral Fee Request**

**REFERRAL FEE REQUEST**

Property Name: Meadowood Park Apartments

**New Resident:**

Name: Tom Jones

Apt. #: A107

Move In Date: 7/14/04

**Referred By:**

Name: Elvis Presley

Address: 12340 Main Street  
Seattle, WA 98188

Apt. #: B109

Approved By:

Martha Manager

Housing Manager

Referral Fee: \$150.00

7/20/04

Date Submitted

Paula Regional Manager

Regional Manager

7/23/04

Date Submitted

**Exhibit 1.3 Request for Check**

Check Needs to Be Cut By:

Date of Request:

Charge to (Property):

Make Check Payable to:

(Vendor Name) If this is a new Vendor, attach a W-9 and New Vendor Registration.

Address:

Amount:

Charge to Account #:

(see Chart of Accounts)

Description of Item(s) to Purchase:

(Use Check Request Estimate portion of Check Request Log if more detail is necessary.)

- |   |   |
|---|---|
| <input type="checkbox"/> Hand Delivery  | <input type="checkbox"/> Leave at Front Desk for pick-up by:  |
|   | <input type="checkbox"/> Deliver to:                          |
| <input type="checkbox"/> To be Mailed   | <input type="checkbox"/> Mail Check to Vendor (address above) |
|   | <input type="checkbox"/> Mail Check to Property (noted above) |
| <input type="checkbox"/> Courier Delivery – Check will be placed in property (noted above) folder for next pick up. |   |
| <input type="checkbox"/> Other – (please specify Name and Address)  |   |

Requested By:

Approved By:

Date Request Received:

Date Check Cut:

Check #:

By:

**Check Request Procedure**

The following paperwork must be submitted to Accounting:

- 1) Completed Check Request Form
- 2) Copy of the invoice (and contract if this is work done by or to be done by a contractor), receipt or bid sheet attached.  
OR  
Completed Check Request Estimate portion of the Check Request Log.

NOTE: Check requests will be processed through the normal A/P schedule unless the Regional Manager and Controller have deemed otherwise, in which case emergency check requests will only be processed on Thursdays.

After the items are purchased and receipts are obtained, a Check Request Log must be completed and returned to the corporate office within 7 days. All receipts corresponding to the log entries must be attached to the back of the sheet. Please tape them securely – do no staple or paper clip! You may put them in an envelope and staple the envelope to the back of the log sheet or tape them on a separate sheet of paper and attach that to the log sheet. You must have a receipt showing the total paid for every entry on the log sheet. Any leftover funds must be deposited in the property bank account immediately and a copy of the deposit slip attached to the log.

Personal items are not to be purchased with property funds and should never be included on a property receipt.



**Exhibit 1.5 Petty Cash Acknowledgement**

**PETTY CASH ACKNOWLEDGEMENT**

I, Martha Manager, agree to receive and be responsible for a petty cash fund in the amount of Two-Hundred Dollars (\$200.00) for Meadowood Lake Village Apartments. This fund is fully my responsibility to manage and use for property related expenditures only during my term as Housing Manager with above mentioned Apartments. If at any time the fund is short, I authorize the Agency as agent for Meadowood Lake Village Apartments, to withhold the deficit from my next paycheck. I further understand that upon my departure, I am responsible for submitting all receipts and/or remaining cash on hand to my Regional Manager for a final calculation. If the fund is short in any amount, I authorize the Agency as agent for the aforementioned Apartments, to withhold any deficit from my final paycheck.

Martha A. Manager

7/21/04

Housing Manager

Date

Paula Regional Manager

7/21/04

Regional Manager

Date



## **List of Exhibits for Chapter 2**

- Exhibit 2.1 – Perfect File Folder
- Exhibit 2.2 – Product Knowledge Notebook
- Exhibit 2.3 – Key Log
- Exhibit 2.4 – Monthly Property Report
- Exhibit 2.5 – Incident Report
- Exhibit 2.6 – Emergency Procedures Manual
- Exhibit 2.7 – Recertification Log

## Exhibit 2.1 Perfect File Folder

### Section I – Initial Occupancy – RIGHT SIDE (back to front)

*Within this section, the following information should be contained:*

- Application Packet
- Initial Move-In Information

*This section originates in occupancy. Developments should not add or remove anything from this section.*

*This section of the file is considered “closed.”*

- ✓ Application
- ✓ Application Checklist
- ✓ Thank you letter
- ✓ Preference certification
- ✓ Preference verification
- ✓ Social Security cards, birth certificates, picture ID
- ✓ Citizenship declarations
- ✓ Criminal history NOTES
- ✓ Credit history
- ✓ Landlord verifications
- ✓ PHA official certification
- ✓ Applicant/tenant certification
- ✓ Release of information (HUD 9886)
- ✓ Release of information
- ✓ Emergency contact information
- ✓ Move-in inspection

### Section II – Lease Agreements – RIGHT SIDE (back to front)

*Within this section, the following information should be contained:*

- Policy acknowledgements
- Lease attachments
- Lease

- ✓ Minimum rent notice
- ✓ Lead notice
- ✓ One Strike notice
- ✓ Flat v. income base rent notice
- ✓ Housekeeping policy
- ✓ Maintenance policy
- ✓ Pet policy/addendum, if applicable
- ✓ Grievance policy acknowledgement
- ✓ Community service policy acknowledgement
- ✓ House rules
- ✓ Transfer paperwork
- ✓ Lease

### **Section III – Financial and Resident Management Data – RIGHT SIDE (back to front)**

*Within this section, the following information should be contained:*

- Tenant Accounting Documents
  - Income Verifications
  - Annual Review Packets, or Interims
- 
- ✓ Income verifications
  - ✓ Deduction verifications
  - ✓ 50058 worksheet and printout of 50058 submitted
  - ✓ Tenant accounting worksheet
  - ✓ Any other related verifications
  - ✓ MEID approval, worksheets, notices
  - ✓ Notice of rent adjustments
  - ✓ Notice of annual reviews
  - ✓ Annual review documents (certifications, release, notices, verifications)
  - ✓ Recertification checklist
  - ✓ Interim review documents
  - ✓ Vacate letter

### **Section IV – Maintenance Data – LEFT SIDE (back to front/oldest to newest)**

*Within this section, the following information should be contained:*

- Housekeeping issues
  - Maintenance issues
- 
- ✓ Inspections
  - ✓ Work order change letters
  - ✓ Housekeeping and maintenance correspondence
  - ✓ Resident damage claims, if applicable
  - ✓ Referrals

### **Section V – Rent Collection Data – LEFT SIDE (back to front/oldest to newest)**

*Within this section, the following information should be contained:*

- Rent related documents
- 
- ✓ Late letters
  - ✓ Legal, enforcement notices
  - ✓ Repayment agreements
  - ✓ Other correspondence related to rent payments
  - ✓ Retro rent information

### **Section VI – Lease Enforcement – LEFT SIDE (back to front/oldest to newest)**

*Within this section, the following information should be contained:*

- Lease violations
- 
- ✓ Lease violation warnings/notices
  - ✓ Police reports, including file notice, banned notices, protective orders, etc.
  - ✓ Lease terminations
  - ✓ Legal correspondence

**Exhibit 2.2 Product Knowledge Notebook**

Chapter	Contents
1. Your Apartment Community	<ul style="list-style-type: none"> <li>▪ Name</li> <li>▪ Address</li> <li>▪ Telephone number, fax number, e-mail address, modem phone number</li> </ul>
2. Emergency Information (this information should also be contained in the site's Emergency Procedures Manual)	<ul style="list-style-type: none"> <li>▪ Police (location/phone numbers)</li> <li>▪ Fire (location, distance to nearest station, phone number)</li> <li>▪ Location of all fire extinguishers</li> <li>▪ Hospital (name of nearest facility, location and distance, phone number)</li> <li>▪ Ambulance (name of nearest service, phone numbers)</li> </ul>
3. Apartment Information	<ul style="list-style-type: none"> <li>▪ Construction type (include year of construction, size of apartments, apartment lay-outs, as-built drawings, etc.)</li> <li>▪ Security (service of system, name and phone number of service, type and service vendor if system)</li> <li>▪ Equipment (sizes and types of all appliances in each apartment – ranges, refrigerators, dishwashers, disposals, etc. For hot water heaters, include number of gallons, location of recovery line, manufacturer, make and model, gas or electric.)</li> <li>▪ Hating (type of system)</li> <li>▪ Air conditioning (type of system)</li> <li>▪ Fireplaces (make and type – wood burning, gas, electric, etc.)</li> <li>▪ Television Antenna/Cable Hook-up/DSL – where located in each apartment, name and phone numbers of service vendors, acceptable locations for satellite dishes)</li> <li>▪ Other special features</li> <li>▪ Carpeting (colors available, manufacturer, type of material – polyester, wool, nylon, etc.)</li> <li>▪ Window treatments (blinds or drapes, colors, window sizes in each apartment, window treatment policy on additional window coverings)</li> <li>▪ Electrical switches and outlets (where located and which switches operate which outlets, how the GFI works)</li> <li>▪ Breaker box (location and operations)</li> <li>▪ Water shut off valves (location and operation, location of “t”-bar for emergency shut-off)</li> <li>▪ Manuals for standard fixtures/appliances</li> <li>▪ Asbestos Manual and Information (location of Asbestos O &amp; M Manual/location of asbestos at the site, location of sample testing/asbestos survey, site procedure for damage to asbestos containing materials)</li> <li>▪ Lead-based Paint (copy of lead-based paint brochure – if property built before 1978)</li> <li>▪ Other hazardous materials (nature of hazard, special handling instructions)</li> </ul>

**Exhibit 2.2 Product Knowledge Notebook**

<p>4. Community Information</p>	<ul style="list-style-type: none"> <li>▪ Opening dates of each phase (if applicable)</li> <li>▪ Number of acres</li> <li>▪ Number of apartments in each phase (if applicable)</li> <li>▪ Number of parking spaces in each phase (if applicable)</li> <li>▪ Number of garages/garage spaces in each phase (if applicable)</li> <li>▪ Parking assignment list</li> <li>▪ Social and Recreational facilities and rules</li> <li>▪ Playground facilities</li> <li>▪ Laundry facilities (cost and hours of operation, location)</li> <li>▪ Storage facilities (location, assignment)</li> <li>▪ Additional facilities</li> <li>▪ Community Map (mark water, electric and gas shut-offs as well as fire hydrants; mark fire alarm panel, sprinkler controls and hydrant locations; photo cell locations; location of fire extinguishers)</li> </ul>
<p>5. Neighborhood Information (include phone numbers where appropriate)</p>	<ul style="list-style-type: none"> <li>▪ Daycare facilities</li> <li>▪ School district (enrollment information, bus service, location of schools, other school information)</li> <li>▪ Adult education programs/services (college and universities)</li> <li>▪ Technical schools, adult classes</li> <li>▪ Postal service information (nearest branch post office hours, main post office, nearest mail drop box)</li> <li>▪ Newspapers (subscription information)</li> <li>▪ Shopping information (nearest convenience store, shopping center, supermarket, and other shopping information)</li> <li>▪ Transportation service/bus (nearest stop, where to get timetables, cost, where to purchase passes/tickets)</li> <li>▪ Transportation service/taxi (phone numbers)</li> <li>▪ Transportation service/airport facilities (location, quickest/ easiest route to airport from apartment community, shuttle services)</li> <li>▪ Transportation service/train (location of station, quickest/ easiest route to station from apartment community)</li> <li>▪ Entertainment and recreation (restaurants, clubs, theaters, bowling alleys, golf courses, parks, museums/art galleries, libraries, other entertainment and recreation facilities)</li> <li>▪ Churches (locations and denominations)</li> <li>▪ Voting information (where to register, where to change address of registered voter, where to vote)</li> <li>▪ Social service agencies</li> </ul>
<p>6. Utility Information</p>	<ul style="list-style-type: none"> <li>▪ Electricity (how to order/transfer utility, average monthly cost and billing cycle)</li> <li>▪ Gas (how to order/transfer utility, average monthly cost and billing cycle)</li> <li>▪ Telephone (how to order/process service options, average monthly cost)</li> <li>▪ Water/sewer (if sub-metered, how to order and cost information)</li> <li>▪ Recycling (location of containers, types of materials recycled)</li> </ul>



**Exhibit 2.4 Monthly Property Report**

"Community Name"  
"Month and Year"

**1. Property Narrative**

**2. Physical Occupancy**

<i>a</i> Unit Type	<i>b</i> Total Units	<i>c</i> Occupied Units	<i>d</i> Mod Rehab	<i>e</i> Make Ready	<i>f</i> Vacant Units	<i>c/b</i> % Gross Occupancy	<i>c/(b-c)</i> % Adjusted Occupancy
1brm							
2 brm							
3 brm							
4 brm							
5 brm							
<b>Total</b>							

**3. Waiting List**

Unit Type	Number of Applications			
	Total	RRO1	PEO3	PEO1
1 brm				
2 brm				
3 brm				
4 brm				
5 brm				

\*\*RRO1 = application approved/ready to be housed/awaiting ready unit\*\*

\*\*PEO3 = passed credit and criminal check; pending other verification\*\*

\*\*PEO1 = application received\*\*

**4. Move-Ins, Move-Outs, and Unit Turnaround Time**

	This Month	Year-to-Date
Move-ins		
Move-outs		
Evictions (included with move-outs)		
Make-ready time		
Lease-up time		
<b>Total Turnaround Time</b>		

**Exhibit 2.4 Monthly Property Report**

"Community Name"

"Month and Year"

**5. List All Vacant Units and their Status**

Address	Bdrm	Projected Ready Date (mm/dd/yy)	Anticipated Lease Date (mm/dd/yy)	Application Approved and Waiting?

**6. Customer Traffic**

Walk-ins requiring about the property	
Telephone inquiry calls	
Applications taken	
Interest letters with brochures sent out	

**7. Promotions/Advertising (narrative)**

**8. Recertifications**

Outstanding at start of month	
Due to be completed this month	
Completed for this month	
Ending backlog	

**9. Annual Unit Inspections**

Total units to be inspected for the year	
Number completed/start of month	
Number inspected for the month	
Number completed year to date	
Total left to be inspected for the year	

Have all building system inspections been completed?	YES or NO
If yes, please enter date	____ / ____ /2005

**Exhibit 2.4 Monthly Property Report**

"Community Name"  
"Month and Year"

**10. Lease Enforcements**

Lease warnings issued	
Lease violations issued	
Abandonment letters	
30-day lease terminations	
72-hour lease terminations	

**11. Evictions**

*List all tenants on formal eviction/court summons, then all households for whom a judgment was issued, the date of the judgment and the action (dismissal, eviction, etc.)*

Resident Name	Reason (30-day/72-hour)	Summons Date	Judgment Action

**12. Non-Emergency Work Orders**

Beginning balance	
Received	
Closed	
Ending Balance	

Total work orders for the month	
Total work orders for the year	

**13. Emergency Work Orders**

	This Month	Year-to-Date
Requested		
Completed within 24 hours		
Percent completed within 24 hours		

**14. Rent Collections**

	This Month
Rent charges	
Other charges	
<b>Total new charges</b>	
Arrears, tenants in possession	
<b>Total charges</b>	
Collections	
Amount outstanding	
<b>Collection rate</b>	

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**Exhibit 2.4 Monthly Property Report**

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“Community Name”

“Month and Year”

**15. Delinquencies**

OUTSTANDING ACCOUNTS	
Total number of households	
Amount	
Number under up-to-date repayment agreements	
Amount under up-to-date repayment agreements	
Number under legal (other than repayment agreements)	
Amount under legal (other than repayment agreements)	
Amount not under repayment agreements or legal	

**16. Other Comments/Notes**

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**Exhibit 2.5 Incident Report and Instructions**

1. Notify appropriate emergency response services (fire, police, medical rescue).
2. DO NOT accept any responsibility for payment of any ambulance or medical expenses which might be incurred.
3. DO NOT make any statements as to fault or responsibility for the cause of the incident. There may be other circumstances of which you were not aware which may determine who is at fault in the matter.
4. Contact your Regional Manager IMMEDIATELY and DO NOT speak to the media.
5. Conduct an accident investigation immediately after an incident is reported to you whether or not any claim is intended to be made:
  - a. Complete thoroughly the "Incident Report" form. State only the facts. DO NOT state any opinions.
  - b. Visually investigate the incident and note any conditions present.
  - c. Interview persons or witnesses involved and have them complete the "Part E – Witness Statement" (as many as needed, one per witness).
  - d. Take photographs immediately.
  - e. Immediately fax the completed report to your Regional Manager. Call to confirm the report has been delivered to your Regional Manager. Keep a copy for your records.
  - f. DO NOT make any statements that the incident will be turned in to the Agency's insurance company. If specifically asked or requested to do so, you may advise only that you will notify the Agency.
  - g. Immediately contact your Regional Manager if you have any questions, concerns or additional information.

**PART A**

Property: \_\_\_\_\_ Date Reported: \_\_\_\_\_  
Name: \_\_\_\_\_ Phone #: \_\_\_\_\_  
Address of Incident: \_\_\_\_\_

Type of Incident:  
 Fire     Storm     Flood/Plumbing     Vandalism     Electrical     Assault  
 Employee Injury     Vehicle Damage     Vehicle Injury     Personal Injury  
 Other - Describe \_\_\_\_\_

Location of Incident: *(specify building, unit #, room, exact location, etc.)*

Time of Incident: \_\_\_\_\_ a.m./p.m.    Date of Incident: \_\_\_\_\_  
Weather conditions at time of incident: \_\_\_\_\_

Agencies called or involved:  
 Police – Case # \_\_\_\_\_     Fire Department     Ambulance  
 Other – Specify \_\_\_\_\_

**\*\*Attach photographs of scene with date/time/location/ of photo indicated\*\***

General Description of Incident:

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**Exhibit 2.5 Incident Report and Instructions**

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**PART B**

Complete for the following incident types:

Assault/Employee Injury/Vehicle Injury/Personal Injury/Other – Describe

List injured party(s)/Age \*(approximate)/Address/Phone number – *\*(if injured party is under 18, list parent/guardian information)*

List witnesses/Age \*(approximate)/Address/Phone number – *\*(if witness is under 18, list parent/guardian information)*

Give detailed accounts of the occurrence (including extent of injury, cause of injury, instructions given on behalf of the property, witness accounts, hospital, attending physician, injured party's insurance, police, fire, and ambulance reports, etc.).

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**PART C**

Complete for the following incident types:

Fire/Storm/Flood/Plumbing/Vandalism/Electrical/Vehicle Damage/Other – Describe

List damaged property/locations/estimated damage

List witnesses/Age \*(approximate)/Address/Phone number – *\*(if witness is under 18, list parent/guardian information)*

Give detailed accounts of the occurrence (including extent of damage, cause of damage, instructions given on behalf of the property, witness accounts, vendor's called, third party's insurance, police and fire reports, etc).

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**Exhibit 2.5 Incident Report and Instructions**

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**PART D**

Regional or Housing Manager Summary

( ) Site of incident secured

( ) Notices issued as a result of occurrence – attach copies

( ) Bids requested from the following vendors for repairs:

( ) Repair work performed by the following vendors due to emergency needs:

( ) Follow-up actions taken:

Signature:  
Title:

Date:

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**PART E**

Witness Statement

Name:

Address:

Phone number:

Relationship to party involved:

Please provide as complete a statement of the occurrence as possible and sign and date the bottom of this page. If you would like a copy of this statement, please request it at the time you give this information.

Signature:

Date:

## **Exhibit 2.6 Emergency Procedures Manual Outline**

Generally, an emergency procedures manual is made up of three sections: (1) reference information, (2) directions for the management staff to follow for each possible emergency, and (3) directions for building occupants.

### Reference Information

The manual should contain in one place any and all information a Portfolio Manager might need in the event of an emergency. This includes:

- General description of the building
- List of the building's safety features, including their locations and information about how to operate them
- Building systems information
- Floor plans and blueprints, including "as built" drawings showing all equipment systems to which access may be needed during an emergency
- Up-to-date list of location of all residents and their special needs, equipment, etc.
- Insurance information (agent's name and home and work telephone numbers, types of insurance, name of carrier, policy number)
- List of any hazardous material on the property

Above all, the manual should contain an extensive list of telephone numbers. An emergency plan will be virtually useless unless the people who put the plan into action can be readily reached. Therefore, one of the most important features of any emergency manual is the list of telephone numbers for everyone involved in disaster management.

The list of emergency phone numbers should make it possible to reach these people 24 hours a day. The list should include the phone numbers for at least the following:

- Police department
- Fire department
- Paramedics
- Every member of the management team (in priority order)
- Weather information
- Building owner
- Hospitals
- Nearby hotels and motels
- Manager of nearby building
- Churches
- Community services (Red Cross, Salvation Army, suicide hotlines, rape crisis centers, domestic violence hotlines, poison control centers)
- Utility companies
- Electricians
- Plumbers
- Elevator contractors
- Security services
- Glass company
- Disaster restoration firms
- Insurance agent
- Media
- Equipment rental company
- Anyone who could provide special assistance during or after an emergency

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## **Exhibit 2.6 Emergency Procedures Manual Outline**

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### Emergency Directions

Second, the manual should cover all of the emergencies that could happen on the property and the procedures that should be followed in the event of each of these emergencies. For each such emergency, the manual should include:

- Detailed description of the management team's duties during the emergency
- Flowchart of the chain of command during the emergency
- Party responsible for handling the media
- Copy of the emergency public address announcement that should be read to occupants in the event of an emergency
- Procedures to account for all employees and residents
- Procedures for evacuating disabled/elderly residents
- Procedures to allow residents to re-enter the building
- Reporting and documentation procedures
- Steps for restoring the property after an emergency

### Resident Directions

Thirdly, the manual should contain information for occupants of the building about emergencies and how they should react during them. A copy of the directions for building occupants to follow in an emergency should be distributed to all residents at the time the procedures are created, upon new move-in, and as updated. This information can also be included in the resident handbook.

## **Exhibit 2.6 Emergency Procedures Manual Outline**

### Emergency Procedures Manual Development Checklist

- ✓ Appliance information. Operating manuals, special instructions, specialty parts suppliers, common problems, how to handle hot water tank emergencies, shut offs, etc.
- ✓ Area map.
- ✓ Elevators. Service company, emergency service code, machine room keys, and emergency procedures.
- ✓ Emergency exits.
- ✓ Emergency numbers. Vendors, agency, emergency contacts of key staff, etc.
- ✓ Emergency procedures. General instructions, people to call, etc.
- ✓ Fire alarm system. How to reset, monitoring company, testing procedures, and location of main panel(s), special instructions.
- ✓ Fire drills. Procedures, frequency, timing.
- ✓ Apartment and building floor plans.
- ✓ General building description.
- ✓ Hazardous material information. MSDS, where hazardous materials are stored.
- ✓ Insurance information. Copy of policies, name and telephone number of agent.
- ✓ Locks. What kind, who has master(s), key box location, who has access to key box. How key system is coded, and combinations for access doors.
- ✓ Mailboxes. Type of box, lock type and style, where replacements can be obtained.
- ✓ Medical emergencies. CPR instructions, location of first aid equipment, known doctors or nurses on site, closest hospital, etc.
- ✓ Security. Telephone numbers and contact of security company, computer access codes, and keypad instructions.
- ✓ Site plan. Building specifications, electrical information (where breaker panels are located, insure that breakers are properly marked, which breakers control common area electrical and which control residents' electrical), fire hydrant locations, garbage, landscaping sprinklers (where are controllers, where are individual valves, who installed system, who has worked on system), pool and spa information/instructions.
- ✓ Resident listing/apartment numbers: Update periodically.
- ✓ Residents who may need assistance. Update periodically.
- ✓ Vendor listing. Identify main vendors and emergency vendors.
- ✓ Water shut-off. Main property shut-off, individual building shut-offs, individual apartment shut-offs, map with location, description of shut-offs, picture of shut-off locations.





**List of Exhibits for Chapter 3**

Exhibit 3.1 – Leasing Training Program

Exhibit 3.2 – Telephone Script

Exhibit 3.3 – Traffic Log

Exhibit 3.4 – Bee-back Coupon

Exhibit 3.5 – Shopper’s Report

**Exhibit 3.1 Leasing Training Program**

Manger's Name		
Date Issued:		
Date Completed		
Community:		
First Week Training Program		
	Date Completed	Approved By
1. Read: <ul style="list-style-type: none"> <li>▪ the rental application</li> <li>▪ the lease agreement</li> <li>▪ the pet agreement</li> <li>▪ the move-in checklist</li> </ul>		
2. Learn how to answer the telephone and how to use proper telephone manners		
3. Learn procedures for writing up a Work Order Request and complete one.		
4. Walk the entire property including the models (if applicable) and vacant units of each floor plan, the laundry facilities, pool, tennis, and clubhouse areas.		
5. Shop two area apartment communities.		
6. Prepare or update Product Knowledge Notebook that includes: <ul style="list-style-type: none"> <li>▪ 20 feature-benefit closes</li> <li>▪ map of property</li> <li>▪ community information</li> <li>▪ property information – rent and policy schedule, amenities, etc.</li> <li>▪ newsletter</li> <li>▪ product information – square footage of each unit type, appliances, carpet colors, average utility costs, soundproofing, etc.</li> </ul>		
7. Be able to give directions to the community.		
8. Know and understand all the elements of a shopper's report.		
9. Prepare a lease agreement and understand its contents with someone who is experienced.		
10. Prepare a move-in folder with someone who is experienced.		
11. Open apartments to be shown for the day with someone who is experienced.		
12. Listen in on at least two prospect telephone calls.		
13. Understand the purpose and elements of a Guest Card.		

**Exhibit 3.1 Leasing Training Program**

14. Go with an experienced person to demonstrate an apartment.		
15. Open apartments/models to be shown for the day.		
16. Write a telephone sales script to assist in the completion of #17.		
17. Set an appointment with a prospect over the telephone, obtaining the following: marketing source, name, telephone number, unit type desired, number of pets, number of occupants; describe the following to the prospect: community and amenities, neighborhood, and the apartment.		
18. Greet a prospect.		
19. Demonstrate an apartment and present the community.		
20. Self-evaluation: evaluate your presentation.		
21. Follow steps 17 through 20 again.		
22. First week evaluation meeting with supervisor.		
General Items		
1. Has a working knowledge of the following terms: (Have your supervisor quiz you on the terms.)		
Ad Book: a cost effectiveness log for newspapers and guides; also a reference book for historically successful ads. A guide in helping on-site personnel to create effective ads.		
Assumptive Question: assumes the sale, includes the answer in the question and is a closing technique. Example: How soon will you be moving into our community?		
Available to Rent: a vacant apartment or apartment on notice without a deposit on it.		
Availability Rate: the percentage of apartments available to rent (also known as Net to Rent Percentage). Divide the number of units available to rent by the total number of units.		
Ben Franklin Close: a closing technique in which you list the positives of renting an apartment and then the prospect lists the negatives. A summary close on paper.		
Closing: getting the sale; leasing the apartment. A continuous process of beginning when the prospect enters the office.		

**Exhibit 3.1 Leasing Training Program**

<p>Closing Ratio to Traffic: the percentage found by dividing the number of rentals by the amount of traffic. May be found for each leasing consultant or all leasing personnel. May be determined for daily, weekly or monthly figure.</p>		
<p>Community: denotes a neighborhood atmosphere unlike some other terms used in the apartment industry, such as complex.</p>		
<p>Cost per Rental: a figure found by dividing the total cost of a given advertising source(s) by the total number of rentals from the source(s). Monitored regularly to determine the effectiveness of the property's spending on advertising.</p>		
<p>Credit Check: a part of processing an application to verify that the applicant pays his/her debts on time.</p>		
<p>Feature/Benefit/close: the leasing consultant points out a feature, makes it beneficial to the prospect and then closes the prospect on it (gets a yes response). Example, <i>"This balcony is very large, perfect for the summertime barbecues. Won't you enjoy entertaining or relaxing here this summer?"</i></p>		
<p>Greeting: the initial contact with the prospect. The agent should stop what they are doing, stand up, smile, greet the visitor, introduce himself/herself and get their names, establish eye contact and be enthusiastic.</p>		
<p>Hot Button: a single, positive comment made by the prospect or anything said which you can use as a positive. Example: Prospect states, <i>"I have a bug problem in my current apartment."</i> The leasing consultant would then respond, <i>"We provide a monthly pest control service. Should you ever need additional service, just contact the office."</i></p>		
<p>Lease Agreement: a legal, binding contract between both parties. It acts as a deposit receipt. It locks the rental rate in for the period of time covered, unless the agreement states otherwise. Protects both parties in the agreement.</p>		
<p>Marketing Plan: a written program designed to make prospective residents aware of your apartments and what you have to offer.</p>		
<p>Merchant Referral: program by which the community pays a feed to a merchant who has referred a prospect to the community who rents an apartment and moves in. The fee does not have to be money but may include free promotions within the community.</p>		
<p>Move-In Checklist: a reminder list to complete all steps before a prospect moves in.</p>		

**Exhibit 3.1 Leasing Training Program**

Notice: an apartment which is occupied and the resident has given written confirmation to the office that they will be moving on a specific date in the future.		
Objection: an obstacle that stands in our way and prevents us from successfully closing the sale. A buying signal; they are interested. When dealing with objections, first overcome it, close the prospect on it and get their "Yes."		
Occupancy Rate: the percentage of apartments that are occupied. Divide the number of apartments occupied by the number of total apartments.		
Occupied: an apartment that is currently lived in or one that is producing income.		
Open an Apartment: to turn on lights, set temperature, open curtains, etc., in order to show a prospect.		
Post Selling: reinforcing the prospect's decision when they have come to move in or after they have left the community and placed a deposit on an apartment.		
Pro-Rate: adjusting the first month's rent, so that the resident pays only for the days he/she actually occupies the apartment.		
Prospect: somebody looking for an apartment.		
Punch-Out: All maintenance activity involved in making an apartment rent-ready.		
Qualifying Questions: questions asked to obtain information to determine and satisfy the needs of a prospect.		
Rent-Ready: an apartment that is painted, cleaned, shampooed and in good working order. An apartment that is ready to be moved into.		
Rental Application: a form that further qualifies the prospect and provides information for verification and approval of the prospect for residency.		
Rent Schedule: a written account that shows the amount of rent charged for each apartment size and type.		
Rent-Up Mode: a community with high availability and/or low occupancy.		
Resident: party who has possession, use and occupancy of an apartment as a result of a lease or rental agreement. The word <i>tenant</i> is never used when referring to a resident.		

**Exhibit 3.1 Leasing Training Program**

Resident Referral: a prospect referred by a resident of the community. Often times, in states that permit it, management will offer a fee to either or both parties if the prospect rents, qualifies and moves in.		
Responsive Marketing: reading your availability and adjusting your rents accordingly.		
Statement of Deposit: sent to every resident after they have moved out detailing the status of their security deposit. Must be sent within 14 days according to Washington state law.		
Self-Evaluation: when qualified prospect does not rent, the next step is to evaluate your sales presentation being honest with yourself.		
Shopper: a person who appears to be looking for an apartment but is actually observing the leasing consultant and rating his or her ability.		
Shopper's Report: a written account of the shopper's visit with the leasing consultant detailing the results. The rating of a leasing consultant.		
"Skip": an apartment that is deserted while still under lease.		
Street Rate/ Ideal Rent/Market Rent/Flat Rent: the current rental rate of any vacant apartment.		
Summary: a closing technique in which you summarize all the prospect's yes's and close them again.		
Traffic Report: a report that shows the amount of traffic, shows and rentals in addition to their sources. May be broken down into individual leasing consultants, cancellations and disapprovals.		
Tent Card: a card left in a rent-ready apartment showing the prospect or the new move-in that the apartment has been inspected.		
Urgency: a closing technique used in every presentation. Example: <i>"I wouldn't want you to miss out on this apartment."</i>		
Vacant: an apartment that is not receiving income.		
Where Did I Go Wrong?: a closing technique which is a last shot asking the prospect where you went wrong.		
Work Order or Service Agreement: a form used to record requests from residents for maintenance problems.		
7-30 Days After Hire		
1. Write a newsletter		
2. Read <u>Dress for Success</u> by John T. Malloy.		

**Exhibit 3.1 Leasing Training Program**

3. Sales:		
a. Understand qualifying standards. Review any advertising that your company may be doing. Telephone technique, opening apartments.		
b. Greeting prospects.		
c. Qualifying prospects, sales presentation, telephone follow-up		
d. Rent ten apartments. After you show an apartment and the prospect doesn't lease, self-evaluate the reasons why not.		
e. Correctly complete all rental application processing on ten rentals.		
f. Correctly complete lease folders and move-in paperwork on ten rentals.		
g. Prepare ten welcome packages.		
h. Follow-up on Guest Cards and send Thank You notes to qualified non-renters.		
I. Complete a Market Survey.		
4. Reports and paperwork:		
a. Understand rent pro-rations for a move-in.		
b. Spend time with the Manager or Assistant Manager reviewing policies on late rent, NSF checks, early termination of leases, etc.		
c. Complete move-in procedures: 1) move-in inspection, and (2) two-week follow-up.		
5. Learn rent posting.		
6. Attend at least one professional marketing/leasing seminar.		
7. Senior Leasing Consultant:		
a. Rent and/or renew 100 apartments.		
b. Complete 25 marketing calls.		
c. Prepare and present an on-site sales meeting.		
8. Evaluation meeting with supervisor.		
9. Additional assignments by supervisor:		
A.		
B.		
C.		
D.		
E.		
F.		

**Exhibit 3.2 Sample Telephone Script**

Thank you for calling. My name is \_\_\_\_\_. May I help you?

GREAT! Who am I speaking with, please? It's very nice to meet you, \_\_\_\_\_. Please call me \_\_\_\_\_. Are you looking for an apartment for yourself, or for someone else?

YES \_\_\_\_\_ NO \_\_\_\_\_ OTHER \_\_\_\_\_  
OCCUPANTS \_\_\_\_\_ # OF ROOMMATES \_\_\_\_\_ TYPE AND SIZE OF PETS \_\_\_\_\_

WONDERFUL! What size apartment are you looking for? \_\_\_\_\_ When do you need to move into your new home? \_\_\_\_\_ FANTASTIC, we do have a \_\_\_\_\_ bedroom apartment that will be available at that time.

\_\_\_\_\_, where will you be moving from? Oh, are you being transferred with your company? YES \_\_\_\_\_ NO \_\_\_\_\_ What company are you with? \_\_\_\_\_  
(If being transferred with the company, ask if others are being transferred and whom you can contact in regards to these relocating employees.)

\_\_\_\_\_ (their name), you mentioned that you were looking for a \_\_\_\_\_ bedroom apartment for you and \_\_\_\_\_ (if applicable). Please tell me what other kinds of things are important to you in your new home.

NOTE: LISTEN CLOSELY and WRITE DOWN THE POINTS THEY MAKE. You will want to refer back to these needs during your presentation.

\_\_\_\_\_, I believe we will be able to meet most of your needs in your new apartment with no problem. We are an income-restricted community. Based on the number of household members, the income limit for your family is \$\_\_\_\_\_ per year. Your family's gross income must be less than this amount to qualify for an apartment in this community. Would you qualify for this apartment?

Wonderful, I know that we have the perfect apartment for you! I would love to show it to you. I have an opening today at \_\_\_\_\_ or \_\_\_\_\_. Which would be more convenient for you? (If neither, ask WHEN it would be convenient for them to come by – get a specific date and time if possible.)

By the way \_\_\_\_\_, how did you hear about our community?

May I give you directions to our community?

\_\_\_\_\_, is there a phone number that I could contact you at if I need to reach you before our appointment?

Thank you very much \_\_\_\_\_. I look forward to meeting you \_\_\_\_\_ (day/date), at \_\_\_\_\_ (time).



**Exhibit 3.4 Be-Back Postcard Coupon Sample**

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Rep:** \_\_\_\_\_

The Village at Overlake offers affordable Studios 1 & 2 Bedroom apartment homes! We have an on-site daycare, fitness center, parking & Metro transit at our doorstep.

**VILLAGE AT OVERLAKE**  
Any Town PHA  
Anytown, USA  
111-222-3333

**Refer a friend to The Village & earn \$50 if they qualify & move-in!**

**Exhibit 3.5 Sample Apartment Shopper's Report**

This confidential report has been requested by management. The purposes of the evaluation are to increase productivity, to improve the leasing skills of the leasing staff, to attract quality residents and to increase retention of existing residents. All comments and opinions are those of the individual who posed as a prospective renter at the date and time shown below.

**PROPERTY INFORMATION**

Property Name:		Phone Number:	
Address:			
Manager's Name:			
Shopping Report Request Received:		Time Requested:	
Special Instructions: (i.e., check for any discrimination in leasing practices)			

**SHOPPER INFORMATION**

Date of Shop:		Arrival Time:		Departure Time:	
---------------	--	---------------	--	-----------------	--

**TELEPHONE CONTACT**

Date/time of call:		Person contacted:	
--------------------	--	-------------------	--

	Yes	No	N/A
Was the telephone answered by giving the name of the property?			
Was the telephone answered by giving the rental consultant's name?			
Was he/she courteous and friendly?			
Did he/she ask for your name (first and last)?			
Did he/she explain that the rents are affordable?			
Did he/she mention the square footage of the apartment?			
Did he/she ask how soon you needed the apartment?			
Were you asked questions to determine the apartment best for your needs (number of occupants, pets, size, location, etc.)			
Did he/she mention any interior amenities of the apartment (painting a desirable picture)?			
Did he/she mention any exterior amenities (pool, clubhouse, laundry facilities, etc.)?			
Did the rental consultant try to make a definite appointment to show the apartment?			
Were you asked for your telephone number (home and work)?			
Were you asked where you live now?			
Did he/she ask you why you were moving?			
Did he/she ask where you were working?			
Were you asked how you heard about the property?			
Were you given clear and concise directions to the property?			

**Exhibit 3.5 Sample Apartment Shopper's Report**

Were you offered any benefits on the location (close to shopping, freeways, your job, etc.)?			
Did the consultant create a sense of urgency?			
Based on this conversation, if you were an actual prospect, would you have visited the property?			
Why?			
CURB APPEAL/APPEARANCE			
Was the property easy to find?			
Were the signs readable and in good condition?			
Was the rental office/manager's apartment easy to locate?			
Did the office/rental area appear neat and professional?			
Did you notice any odors?			
Was the landscaping neat and well maintained?			
Were the walkways clean?			
Were any fences in good repair?			
Were the buildings well maintained?			
Was the dumpster area clean?			
Was the parking lot clean and in good condition?			
Were bikes and toys lying around?			
Were derelict cars visible?			
Were windows and draperies clean?			
Was the pool/spa clean?			
Was the pool area clean and in good condition?			
Did he/she show the laundry room to you?			
Was the laundry room and equipment clean?			
Daytime _____ or evening _____ visit			
If evening, were the common areas well lighted?			
Based upon your first impression, was the property somewhere you would want to live?			
Rate the condition of your initial impression: Excellent _____ Good _____ Fair _____ Poor _____			
GREETING			
Was the consultant well groomed and professional?			
Did he/she stand when you entered the office?			
Did he/she introduce himself/herself?			
Did he/she ask your name?			
Did he/she remember your phone call?			
Did he/she remember your name from the phone call?			
Was he/she eating or smoking?			

**Exhibit 3.5 Sample Apartment Shopper's Report**

Was he/she friendly and courteous?			
Did he/she seem enthusiastic?			
Was he/she in command of the situation?			
Did he/she seem genuinely interested in you?			
Comments:			
THE INTERVIEW			
Did he/she ask how you learned of the property?			
Did he/she ask when you wanted to move?			
Did he/she ask why you were moving?			
Did he/she ask when your present lease was up?			
Did he/she ask you about your needs?			
Did he/she ask open-ended questions to get you to talking?			
Did he/she act attentive?			
Did he/she ask if you had any pets?			
Did he/she ask who would be living with you?			
If you had children, did he/she encourage you?			
If you had children, did he/she discourage you?			
Did he/she give you honest information about the lease/deposits?			
Was he/she frank about utility costs?			
Did he/she ask you about your interests?			
Did he/she mention other residents with your interests?			
Did he/she tell you about churches, schools, shopping, etc.?			
Did he/she ask you about your employment?			
Were resident rules discussed?			
Did he/she sell the management and maintenance?			
Did he/she make you want to live there?			
Did he/she use your name often?			
Comments:			
THE DEMONSTRATION			
Did he/she go with you to see the model/vacancy?			
What was discussed enroute to the unit?			
Did he/she choose a scenic route to the unit?			
Were amenities shown and discussed enroute?			
Did he/she take control and lead the way with enthusiasm?			
What was his/her opening statement upon entering the unit?			

**Exhibit 3.5 Sample Apartment Shopper's Report**

Was the unit clean and fresh smelling?			
Were the unit's features and benefits demonstrated?			
Did he/she smoke while showing the apartment?			
Did he/she know the sizes of the rooms/unit?			
Did he/she point out the unit's advantages?			
Did he/she point out the unit's disadvantages?			
Were the appliances clean and in working order?			
Did you see any roaches, bugs?			
Were any promises made about painting, cleaning, or carpeting?			
Did he/she apologize for the property at any time?			
Comments:			
<b>THE CLOSE</b>			
Did he/she try more than once to close?			
Did he/she ask closing questions early?			
Did he/she oversell at any time?			
Did he/she say the management/community was very selective about their residents?			
Did he/she explain the screening process?			
Did he/she say how long it would take to screen?			
How long?			
Did he/she explain the rates/terms of the lease in a positive manner?			
Did he/she ask you to fill out a rental application?			
Did he/she review the application for completeness?			
Did he/she imply they'd like you to live there?			
Did you feel the apartment was yours from the beginning?			
Did he/she create a sense of urgency in renting this unit?			
Were your objections overcome?			
If unable to meet your needs, did he/she refer you to another property?			
Comments:			
<b>FOLLOW-UP</b>			
Did he/she contact you later by phone? _____ By letter? _____			
Were you spotted as a shopper?			

**List of Exhibits for Chapter 4**

Exhibit 4.1 – Rental Screening Criteria

**Exhibit 4.1 Rental Screening Criteria**

**QUALIFICATION CRITERIA:**

<b>Rental History:</b>	<b><u>12 months valid, verifiable rental history.</u></b> <i>Valid means a written lease or month-to-month agreement or verifiable agency housing. Rental history of less than 12 months may result in a conditional approval, requiring a Co-Signer. The recommendation will be dependent on credit history, employment history and income requirements.</i>
<b>Credit History:</b>	<b><u>Credit history reflecting that all existing accounts are in good standing. No credit will be considered good credit.</u></b> <i>Derogatory credit history in excess of \$500 may result in a conditional approval requiring a Co-Signer. The recommendation will be dependent on rental history, employment history and income requirement.</i>
<b>Employment:</b>	<b><u>No minimum requirements.</u></b>
<b>Income:</b>	<b><u>No minimum requirements.</u></b>
<b>Social Security:</b>	<b><u>Applicant must have a valid, verifiable social security number and/or valid visa, alien registration receipt card, temporary resident card, employment authorization card number of other identification verifying eligibility to reside in the United States.</u></b> <i>Falsification of any of these numbers will result in denial.</i>

**CO-SIGNER CRITERIA:**

A co-signer will be approved if all the qualifications below are met without exception. The co-signer will not qualify if any one of the criteria are not met without exception.

<b>Rental History:</b>	12 months of valid and verifiable rental or mortgage history with no late payments.
<b>Credit History:</b>	At least four accounts in good standing with less than \$500 in derogatory accounts.
<b>Employment:</b>	12 months on the job or continuous, verifiable employment or guaranteed source of income for 12 months.
<b>Income:</b>	Verifiable, income must equal no less than 4 times the rental amount.
<b>Residence:</b>	The co-signer must reside in the state of Washington.

**GROUND FOR DENIAL WILL RESULT FROM THE FOLLOWING (BOTH CONVICTIONS AND PENDING CHARGES) ON ALL APPLICANTS:**

- Verification that the household does not meet the eligibility requirements of the HUD program or any other applicable affordable housing programs
- Eviction from federally subsidized housing
- Verified eviction showing on credit report or confirmed with landlord
- Rental collection verified on credit report
- Balance owing to landlord
- Extreme negative and adverse rental history, e.g., documented complaints and/or damages, multiple late payments or 72-hour notices to pay or vacate with statement by landlord of “WOULD NOT RE-RENT”
- Verification from a former landlord of failure to cooperate with applicable re-certification procedures
- Verification from a former landlord of termination of assistance as a result of fraud
- Failure to sign and submit HUD required verification forms, e.g., HUD9887, HUD9887A, Section 214
- Unverifiable social security number or falsification of social security number
- Falsification of rental application or Rental Eligibility Application (including non-disclosure of criminal records)
- Breaking lease agreement that will result in collection filing
- Verified name and date of birth match of criminal conviction as follows:

**Exhibit 4.1 Rental Screening Criteria**

○ Murder (all counts)	○ Kidnapping (all counts)	○ Manslaughter (all counts)
○ Theft (all counts)	○ Assault (1 <sup>st</sup> , 2 <sup>nd</sup> & 3 <sup>rd</sup> Degree)	○ Robbery (all counts)
○ Burglary (all counts)	○ Vehicle Prowling (all counts)	○ Malicious Mischief (1 <sup>st</sup> & 2 <sup>nd</sup> Degree)
○ Rape (all counts)	○ Rape of a Child (all counts)	○ Child Molestation (all counts)
○ Embezzling (all counts)	○ Forgery (all counts)	○ Fraud (all counts)
○ Arson (all counts)	○ Reckless Burning (1 <sup>st</sup> Degree)	○ Any Drug Related Conviction (all counts)

**OCCUPANCY CRITERIA:**

Studio	3 Occupants
1 Bedroom Unit	3 Occupants
2 Bedroom Unit	5 Occupants
3 Bedroom Unit	7 Occupants
4 Bedroom Unit	9 Occupants

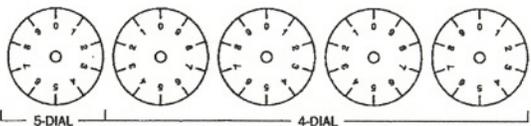
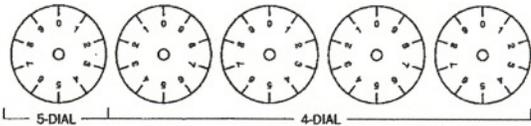
\*If a household is approved for occupancy based on their screening report but then later found to be ineligible, the finding of eligibility will constitute a reversal of the screening approval.



**List of Exhibits for Chapter 5**

Exhibit 5.1 – Utility Transfer Card

## Exhibit 5.1 Utility Transfer Card

NOTICE OF CHANGED OF TENANTS						PLEASE PRINT.
To assist us in billing please complete this form when a tenant moves in or out and mail to us promptly. Thank you.						
APARTMENT COMPLEX NAME:			ACCOUNT NO. (for office use only)			
SERVICE ADDRESS			Apt. #		CITY	
TENANT NAME (first, middle, last)						
CARE OF			WORK PHONE		EXT.	
MAILING ADDRESS (if different)			WORK PHONE		EXT.	
CITY			STATE		ZIP	
EMPLOYER			LENGTH OF EMP.		SOCIAL SECURITY NO.	
PREVIOUS ADDRESS			CITY		STATE ZIP	
SPOUSE (first, middle, last)			EMPLOYER			
TWO MAJOR CREDIT CARDS AND NUMBERS						
1)			2)			
CARD #		EXP. DATE		CARD #		EXP. DATE
PERSONAL REFERENCE			PHONE		( )	
ADDRESS			CITY		STATE ZIP	
If a deposit is requested on your account and you have previously had service with another utility, a satisfactory payment verification letter can be provided within 10 working days of this application in order to waive the deposit.						
CO-CUSTOMER (first, middle, last)						
CARE OF			WORK PHONE		EXT.	
MAILING ADDRESS (if different)			HOME PHONE		EXT.	
CITY			STATE		ZIP	
EMPLOYER			LENGTH OF EMP.		SOCIAL SECURITY NO.	
PREVIOUS ADDRESS						
<b>MOVE-IN INFORMATION</b>						
In order to prevent discrepancies in move-in dates and meter readings we request that tenant(s) and landlord/manager sign this form to verify information is correct. Thank you.						
MOVE-IN DATE			TENANT			DATE
APARTMENT MANAGER/LANDLORD		DATE		SPOUSE OR CO-CUSTOMER		DATE
<b>MOVE-OUT INFORMATION</b>						
In order to prevent discrepancies in move-out dates and meter readings we request that tenant(s) sign out for utility service. Thank you.						
MOVE-OUT DATE						
TENANT'S FORWARDING ADDRESS					APT. #	
CITY			STATE		ZIP	
CO-CUSTOMER'S FORWARDING ADDRESS					APT. #	
CITY			STATE		ZIP	
APARTMENT MANAGER/LANDLORD					DATE	
TENANT					DATE	
SPOUSE/CO-CUSTOMER					DATE	
DID BOTH TENANT AND CO-CUSTOMER MOVE? (check one)						
<input type="checkbox"/> YES <input type="checkbox"/> NO						
(this section optional)						
METER # _____						
DATE OF READ _____			<div style="display: flex; justify-content: space-around; width: 100%;"> <span>5-DIAL</span> <span>4-DIAL</span> </div>			
<b>MOVE-IN READ</b>						
From left to right, mark dials as viewed exactly.						
(this section optional)						
METER # _____						
DATE OF READ _____			<div style="display: flex; justify-content: space-around; width: 100%;"> <span>5-DIAL</span> <span>4-DIAL</span> </div>			
<b>MOVE-IN READ/MOVE-OUT READ</b>						
From left to right, mark dials as viewed exactly.						

1400 12/98

**List of Exhibits for Chapter 6**

Exhibit 6.1 – Parcel Log



**List of Exhibits for Chapter 7**

Exhibit 7.1 – Notice of Intent to Vacate

Exhibit 7.2 – Move-out Checklist

Exhibit 7.3 – Letter of Responsibility

Exhibit 7.4 – Pre-move out Inspection

Exhibit 7.5 – Vacant Unit Turnover Checklist

Exhibit 7.6 – Vacant Unit Tracking Sheet

Exhibit 7.7 – Completed Make Ready Form

### Exhibit 7.1 Notice of Intent to Vacate

To _____ Apartments (Property Name)		
YOU ARE HEREBY INFORMED AND NOTIFIED that the undersigned residents will vacate said premises on or before _____, 20____ and you may rent said premises and show the same for rental at all responsible times, with 24 hour notice, from this date forward. Resident understands that they are responsible for rent through the end of their Lease or Rental Agreement regardless of move out date.		
Name (please print)	Address	
Name (please print)	Apartment No.	Phone No.
Dated this _____ day of _____, 20 _____		
Resident's Signature		
<p><b>IT IS THE RESIDENT'S OBLIGATION TO LEAVE THE APARTMENT CLEAN AND IN GOOD CONDITION AT THE TIME OF VACATING AS INDICATED BY THE INSPECTION REPORT FILLED OUT AT THE COMMENCEMENT OF HIS RESIDENCY. THE FOLLOWING IS A CLEANING GUIDE TO BE USED IN ADDITION TO THE INSPECTING REPORT.</b></p>		
<p><b>GENERAL AREA</b></p> <ol style="list-style-type: none"> <li>1. <input type="checkbox"/> Walls are to be washed and all marks removed.</li> <li>2. <input type="checkbox"/> Windows are to be washed and the tracks cleaned.</li> <li>3. <input type="checkbox"/> Light fixtures, lamps, window sills and shelves are to be cleaned.</li> <li>4. <input type="checkbox"/> Balcony, storage area and carport areas are to be cleaned.</li> <li>5. <input type="checkbox"/> All tile, wood and/or vinyl floors are to be cleaned.</li> <li>6. <input type="checkbox"/> All closets are to be cleaned.</li> <li>7. <input type="checkbox"/> Fireplace is to be free of ashes and cleaned.</li> </ol>		
<p><b>KITCHEN</b></p> <ol style="list-style-type: none"> <li>1. <input type="checkbox"/> Refrigerator is to be defrosted and cleaned, inside and out and turned on low. Do not turn off.</li> <li>2. <input type="checkbox"/> Range – the outside must be cleaned thoroughly, including sides, top, under drip pans and drip pans. Oven must be cleaned thoroughly.</li> <li>3. <input type="checkbox"/> Hood and exhaust fan are to be cleaned.</li> <li>4. <input type="checkbox"/> Dishwasher and disposal are to be cleaned and in operating order.</li> <li>5. <input type="checkbox"/> Cabinets are to have all paper and utensils removed and shelves cleaned.</li> <li>6. <input type="checkbox"/> Floor is to be swept and mopped clean.</li> </ol>		
<p><b>BATHROOMS</b></p> <ol style="list-style-type: none"> <li>1. <input type="checkbox"/> Tile/formica is to be washed and grout cleaned.</li> <li>2. <input type="checkbox"/> Medicine cabinet is to be cleaned including mirror and shelves.</li> <li>3. <input type="checkbox"/> Tub, basin, showers and toilet are to be cleaned.</li> </ol>		
<p><b>WASHER &amp; DRYER</b></p> <ol style="list-style-type: none"> <li>1. <input type="checkbox"/> Washer is to be cleaned inside and out.</li> <li>2. <input type="checkbox"/> Dryer is to be cleaned inside and out.</li> <li>3. <input type="checkbox"/> Dryer vent is to be free from lint.</li> <li>4. <input type="checkbox"/> Lint trap is to be thoroughly cleaned.</li> </ol>		
<p><b>IN ADDITION, YOU SHOULD NOTIFY THE UTILITY COMPANIES, RETURN YOUR KEYS, AND LEAVE A FORWARDING ADDRESS WITH THE POST OFFICE AND RESIDENT MANAGER.</b></p>		
<p>The condition of the apartment at the time of vacating shall be inspected against the move-in "Apartment Inspection Report" by the Resident Manager, who has the final authority to determine how much of the Security Deposit shall be refunded in accordance with the conditions set forth in the Rental Agreement or Lease. <b>We expect you to inspect the vacated apartment with the Resident Manager.</b></p>		
We have enjoyed your residency. Thank you. Please give us your reason for vacating:		

**Exhibit 7.2 Move Out Checklist**

Resident Name:			
Apartment #.		Type of Apartment:	
Move In Date:		Move Out Date:	
Checklist		Date Completed	Completed By
Received proper Notice to Vacate			
Check Lease to see if Resident stayed Lease			
Term (must pay for lease term)			
Apartment Inspection Report completed			
(Corporate office sends copy to resident)			
Received forwarding address and telephone number			
Check Resident File/Ledger Card for			
Additional monies owing			
Number of keys received correct			
Attorney called (if money is owing)			
Power company notified			
Postal Service notified of move-out			
Turn off water heater			
Locks changed on apartment/mailbox			
Maintenance/Repairs done			
Cleaning personnel scheduled			
Painting personnel scheduled			
Carpet cleaning scheduled			

**Exhibit 7.3 Letter of Responsibility**

Property Name:		Apartment #:	
Address:			
Resident(s):			

Dear Resident:

Since you have been given notice to vacate on \_\_\_\_\_, we have listed below a few requirements that are expected of you before you move. We hope this will assist you in getting your apartment ready for inspection.

- |  |                                |
|--|--------------------------------|
| <b>KITCHEN</b>   | <b>BATHROOM</b>                |
| Clean and defrost refrigerator (PLEASE DO NOT TURN IT OFF) | Clean toilet, tub, tiles, sink |
| Clean oven/range/broiler                                   | Clean medicine cabinet         |
| Clean vent hood and fan                                    | Clean all floors               |
| Clean cabinets, remove shelf-paper and rid room of trash   | Rid room of trash              |
|  | Wash all windows (inside)      |
|  | Remove all nails and hooks     |

Required painting will be charged according to the time and materials as charged to the property by the vendor. Painting charges will be assessed on your length of occupancy per the following schedule:

0-6 months	100%
6-12 months	75%
12-24 months	50%
24-36 months	25%
Over 36 months	0%

Paint charges are for painting only and do not reflect drywall repair. The average cost to fully paint an apartment in this community is \$\_\_\_\_\_.

The guideline for replacing or repairing carpet, vinyl and wood flooring in your apartment will be based on a \_\_\_\_\_ year life-expectancy. You will be charged for repair to or replacement of carpeting due to rug stains, burns or small holes in carpeting, or excessive wear and tear.

Replacement of appliances will be charged at current contract prices. Consideration will be given to the condition of the appliance at the time of move-in.

Your apartment must be returned to us in the condition in which you received it, except for normal wear and tear. Dirt is not considered normal wear and tear and charges will be assessed for all cleaning (with the exception of carpet and drapery cleaning) done. Charges will be assessed per the following schedule:

Light touch up (3 hours)	\$ _____
Bathrooms	\$ _____ each
Kitchen	\$ _____
Extra dirty - \$15 per hour for every hour over 3 hours	

Required repairs and replacement for damage to the unit will be charged at cost plus \$15 per hour.

Upon vacating your apartment, please return all keys to the office. (There will be a \$\_\_\_\_\_ per key charge for all keys not returned, or \$\_\_\_\_\_ if the lock must be changed when keys are not returned). According to our records, you are scheduled for move-out on \_\_\_\_\_ (Date), with a move-out inspection scheduled for \_\_\_\_\_ (Time) that day. (Please note that move-out inspections can be scheduled during office hours only.)

After the move-out inspection, any items that must be re-cleaned, repaired or replaced will be deducted from your Security Deposit, as well as any balances that may be due for rental charges unpaid.

We will make every effort to accommodate your schedule in determining a move-out inspection. Failure to attend the move-out inspection will cause you to lose the right to contest any charges contained in the move-out report.

Should you have any questions concerning the above, please do not hesitate to call the office.

Sincerely,

Housing Manager

**Exhibit 7.4 Pre-Move Out Inspection**

Resident Name:					
Property:		Date:			
Prepared By:					
Unit No.		Size:		Style:	
Carpeting					
Vinyl					
Tile					
Windows					
Blinds					
Doors					
Paint/walls					
Countertops					
Appliances					
Heaters/AC					
Tubs/sinks					
Other/Amenities					
Comments					

### Exhibit 7.5 Vacant Unit Turnover Checklist

- Remove all trash, litter and abandoned property from the apartment
- Change locks on doors
- Check for and repair any water leaks – kitchen and bathroom(s)
- Remove bi-fold doors
- Remove interior doors
- Remove switch and plug plates
- Remove curtain rods and shades/blinds
- Remove globes from light fixtures
- Remove exhaust fans and covers – bathroom(s) and kitchen
- Remove all chrome accessories from bathroom
- Remove heating system covers
- Remove smoke detector covers
- Remove nails, screws, etc. from walls
- Wash walls as needed
- Clean tops of doors and window trim
- Clean tops of kitchen cabinets
- Patch all holes and damaged areas in walls as needed
- KILZ or prime all stains in ceiling and walls as needed
- Check and repair all plumbing as needed
- Check and repair all electrical as needed
- Repair structural damage to doors, etc., inside and outside of apartment
- Sand all walls to remove high spots and flaws
- Straighten all metal doors and heat covers
- Paint ceilings as needed
- Paint walls as needed
- Paint closets, shelving, bi-fold doors, heater covers, etc., (2 coats if necessary)
- Clean, check and repair kitchen cabinets, handles, doors, hinges, shelves as needed
- Stain all nicks, scratches and gouges in doors, door frames, windows and cabinets
- Clean kitchen sink and fixtures
- Clean bathroom sink and fixtures
- Clean and re-install all bathroom chrome accessories
- Re-caulk tub, sink and kitchen countertop
- Check carpeting – re-tack if needed – inspect for cleaning or replacement
- Check kitchen linoleum – clean and repair or replace as needed
- Check bathroom linoleum – clean and repair or replace as needed
- Replace all missing light bulbs
- Clean and replace damaged light globes
- Check and clean smoke alarm covers – replace battery – replace cover as needed
- Clean and repair or replace kitchen appliances as needed
- Clean and re-install light switch plates and plug plates
- Clean, repair or replace window shades/rods/blinds
- Clean, repair or replace exhaust fans and covers
- Clean, repair or replace windows and screens
- Check, repair or replace window and door weather stripping
- Re-install interior doors
- Re-install metal or wood bi-fold doors – check tracks, pins and slides, clean as needed
- Replace heating system covers
- Clean apartment thoroughly
- Remove any paint spills, brush marks, etc., from trim and base
- Clean, repair or replace all base covers
- Clean or replace carpeting as needed
- Install all door stops
- Inspect apartment and touch up as needed
- Re-inspect apartment



### Exhibit 7.7 Completed Make Ready Form

<b>Apt. #</b>	<b>Date:</b> /    /	<b>Maintenance Associate</b>
---------------	---------------------	------------------------------

Check boxes for completed or replaced items. File completed and approved checklist in unit maintenance file.

**Notify office of Maintenance Supervisor of any vendor work needed, such as: carpet, vinyl, counter top repairs, etc.**

**\*Item should be checked closely, caulking may need replacement; \*\*If caulking is needed, remove all caulking first.**

Approach	O.K.	Replace	Kitchen Continued	O.K.	Replace	Hallways Continued	O.K.	Replace
Check Exterior Light Fixture			Check Hoses			Check Outlets		
Check Hallways			Check Dryer			Check Light Fixtures		
Check Threshold			Check Dryer vent			<b>Bedroom</b>		
Check Sidewalks			Check Shelving			Check Ceiling Fan		
Check Exterior Front Door*			Check Countertops*			Check Light Fixtures		
Check Stairs			Check Cabinets			Check Switches		
<b>Interior Entry</b>			Check Sink			Check Outlets		
Check Switches			Check Faucets			Check Walls and Ceilings		
Check Light Fixtures			Check Flooring			Check Carpet		
Check Inside Front Door			Check Walls and Ceilings			Check Interior Doors		
Check Interior Doors			Check Interior Doors			Check Doorstops		
Check Windows*			Check Windows*			Check Windows*		
Check Blinds			Check Blinds			Check Sliding Doors*		
Check Doorsteps			Check GFCIs			Check Blinds		
Check Walls and Ceilings			Check Switches			<b>Closets</b>		
Check Flooring			Check Outlets			Check Shelving		
Check Carpet			Check Light Fixtures			Check Walls and Ceilings		
<b>Living Room</b>			<b>Bathrooms</b>			Check Light Fixtures		
Check Ceiling Fan			Check Sinks**			Check Switches		
Check Light Fixtures			Check Faucets			Check Pull Cords/Chains		
Check Outlets			Check Pop-up			Check Attic Access Panels		
Check Switches			Check Bathtub/Shower**			<b>HVAC</b>		
Check Interior Doors			Check Bathtub/Shower Faucets			Check Operation		
Check Walls and Ceilings			Check Showerheads			Check Air Circulation		
Check Flooring			Check Toilets*			Check Thermostats		
Check Carpet			Check Countertops*			Check/Clean Evaporator		
Check Windows*			Check Cabinets			Check Condenser Pan		
Check Sliding Doors			Check Machine Cabinets			Check/Clean Condenser Coil		
Check Blinds			Check Shelving			Check Condenser Fan Motor		
Check Doorstops			Check Towel Bars			Check Furnace		
Check/Paint Fireplace			Check Paper Holders			Check/Clean Baseboards		
<b>Patio/Balcony</b>			Check Flooring			Check/Clean Wall Heaters		
Check Exterior Doors*			Check Walls and Ceilings			Check/Clean All Vents		
Check Light Fixtures			Check Interior Doors			Check All Filters		
Check Deck Surface			Check Doorstops			<b>Safety/Security</b>		
Check Railings			Check Windows*			Check Peephole 160 degrees		
Check Water Heater			Check Water Heater			Check Passage Set		
Check Outlets			Check Blinds			Check Strike Plate (3" screws)		
Check Switches			Check GFCIs			Check Window Latches		
Check Exterior Paint			Check Switches			Check Sliding Door Latch		
<b>Kitchen/Appliances</b>			Check Outlets			Check Sliding Door Pin		
Check Refrigerator			Check Light Fixtures			Check Smoke Detectors		
Check Icemaker			<b>Hallways</b>			Check Fire Extinguisher		
Check Dishwasher			Check Walls and Ceilings			Change /Re-key Locks		
Check Disposal & Air Gap			Check Interior Doors			<b>Before Leaving Apt.</b>		
Check Range Top			Check Doorstops			Remove All Trash		
Check Oven			Check Windows*			Turn Off AC and Lights		
Check Microwave			Check Blinds			Close Drapes/Blinds		
Check Vent Hood			Check Carpet/Flooring			Lock Windows and Doors		
Check Washing Machine			Check Switches					

**Comments:**

	Date
--	------

	Maintenance Supervisor must inspect, make ready, safety/lock/key items and initial here:	
	Housing Manager must inspect apartment and initial here:	

**List of Exhibits for Chapter 8**

Exhibit 8.1 – Maintenance Skills Assessment Test for Qualifications

Exhibit 8.2 – Inventory Sheet for Tools and Equipment

Exhibit 8.3 – Appliance Control Log

**MAINTENANCE SKILLS ASSESSMENT  
TEST QUESTIONS**

**DO NOT WRITE ON QUESTION SHEET.** Record all responses to questions on the appropriate answer sheet. Read each question carefully and choose the best answer. Some questions may appear to have more than one answer.

---

**GENERAL:**

1. What type of drywall sheeting is best suited for use in interior, high moisture areas?
  - a. Bulldog wet board
  - b. Brown board
  - c. Green board
  - d. Primer grade yellow board
  
2. Which of the following fasteners is not commonly used in drywall?
  - a. Toggle bolt
  - b. Molly bolt
  - c. Spiral masonry nail
  - d. Bulldog hanger
  
3. In regards to door locks – what is the difference between master pins and driver pins?
  - a. No difference
  - b. Master pins are a different color
  - c. Master pins are typically smaller
  - d. Master pins are oblong shaped
  
4. When is the best time to change a lock on a vacant apartment?
  - a. As soon as the resident moves out
  - b. After the apartment is market ready
  - c. Just before new resident moves in
  - d. Only when instructed to do so by manager
  
5. What is the value of a preventative maintenance program?
  - a. Overall maintenance cost are minimized
  - b. Decreased in maintenance man hours
  - c. Increased efficiency and life of equipment
  - d. All of the above
  
6. Which of the following items would not be found on a metal entry door?
  - a. Self closing hinges
  - b. Strike plate
  - c. Threshold
  - d. Ballast
  
7. Which of the following items would not be used to repair a wooden door?
  - a. Drywall compound
  - b. Plastic wood
  - c. Rubbing compound
  - d. Carpenters glue

8. If a resident asked you about transferring into another apartment in the community, what would you do?
  - a. tell the resident you do not know anything about transferring
  - b. politely refer the resident to the leasing agent in the information center
  - c. tell the resident that he/she will have to find someone else to rent their present apartment before a transfer will be considered
  - d. tell the resident that you will check into it and get back to the resident with the answer
9. You witness a crime in progress on the property, what steps should you take?
  - a. notify the policy department immediately
  - b. get one or two more maintenance associates and catch the criminal, then call the police
  - c. get a good description, if possible, and immediately call the police department but make no attempt to stop the crime yourself
  - d. make a citizens arrest and read the criminal his rights
10. A resident has fallen down and injured his back and cannot get up, what should you do?
  - a. pick up the resident and take him to the hospital
  - b. ask the resident to let you look at his back
  - c. keep the resident calm but do not try to move him. Inform him that you are going to get help
  - d. see if the resident can sit up
11. Which paint brush would be best suited for applying flat latex paint according to manufactures recommendations?
  - a. hair bristle brush
  - b. nylon bristle brush
  - c. foam brush pad
  - d. doesn't matter all are good brushes
12. When entering a unit to be painted, what are the first steps to be taken in preparation for the work?
  - a. set up your tools, drop cloths, and materials; start filling all holes and cracks
  - b. look the unit over and start scraping and filling all holes
  - c. scrap and fill all holes and cracks and apply primer coat to all rooms
  - d. paint doors and trim, patch holes and cracks, then paint
13. What should you do before painting over dark water stains on walls and ceiling that have dried?
  - a. you should paint the entire room, because if you don't, the new paint will not match
  - b. sand the stained areas and then paint the same color
  - c. apply a thin coat of sheet rock to hide the stain and then paint
  - d. be sure the water leak has stopped, prime or seal the stained areas, allow to dry before applying the finish coat. If necessary paint the entire surface.
14. Which of the following could be the cause of insulated glass fogging on the inside?
  - a. abnormal uv rays
  - b. high humidity
  - c. bad seal
  - d. stuck balance
15. If a water main on the property breaks what should you do?
  - a. Turn off the water at the meter in which the water main supplies, check to see if the water stops running, if the water stops running call a plumber, if it doesn't stop running call the water company
  - b. Turn the water off at the utility main and call the water department
  - c. With the water still on see if you can dig up the water main to see why it is leaking
  - d. Turn off the water and dig up the water main to find the leak, once you find the cause of the leak call the water company
16. Caulking can be used to make small repairs in vinyl floors.
  - a. true
  - b. false

## **ELECTRICAL:**

17. There are two kinds of electrical current. They are?
  - a. Direct current charge and current flow
  - b. Light current and electrical current
  - c. Direct current and alternating current
  - d. Plug in current and battery current
  
18. Which of the following types of light bulbs consumes the least amount of energy?
  - a. 60 watt incandescent
  - b. 150 watt par flood
  - c. 14 watt florescent
  - d. 150 watt mercury vapor
  
19. Which of the following tools is most often used to check continuity of a circuit?
  - a. Ammeter
  - b. Gyro meter
  - c. Ohmmeter
  - d. Voltmeter
  
20. What type of outlet is code required to be installed in areas where water could create a shock hazard?
  - a. DMV
  - b. 3 prong grounded
  - c. duplex
  
21. A ballast would most likely be used with which of the following type bulbs?
  - a. Incandescent
  - b. Candelabra
  - c. Par flood
  - d. Florescent
  
22. Which of the following devices could be used to turn lights on and off on the exterior of buildings?
  - a. photoelectric control
  - b. six hour clock timer
  - c. digital wattstat control
  - d. analog photosyner
  
23. What is the purpose of a circuit breaker?
  - a. to protect from being shocked
  - b. to protect the wire from being over amped
  - c. to turn off high voltage pumps (swimming pool, boiler, ea.)
  - d. all of the above
  
24. Which of the following wire sizes would carry the most load?
  - a. 18 AWG
  - b. 16 AWG
  - c. 8 AWG
  - d. 10 AWG
  
25. In a 120 V three wire system, which of the following wires is usually hot?
  - a. Red
  - b. White

- c. Black
  - d. green
26. Which of the following switches would be used to control a single fixture from two locations?
- a. two way toggle
  - b. three way toggle
  - c. four way toggle
  - d. bi-way toggle
27. What does the international electrical symbol E stand for?
- a. Watts
  - b. Ohms
  - c. Volts
  - d. amps
28. A circuit of 120 v has a resistance of 20 ohms. What would be the current flow (amps) of this circuit?
- a. 12 amps
  - b. 16 amps
  - c. 8 amps
  - d. 6 amps
29. An exterior lighting circuit of 120 v has 10, 60 watt light bulbs. What would be the current flow (amps) of this circuit?
- a. 8 amps
  - b. 6 amps
  - c. 5 amps
  - d. 3 amps
30. What does the international electrical symbol I stand for?
- a. watts
  - b. ohms
  - c. volts
  - d. amps
31. The flow of electrical energy is called:
- a. amperage
  - b. current
  - c. voltage
32. The rating for other than individual branch circuits shall be?
- a. 15 or 20 amps
  - b. 30 or 40 amps
  - c. both a and b
  - d. none of the above
33. Fuses and circuit breaker shall be permitted to be connected in parallel.
- a. when factory assembled
  - b. when factory assembled in parallel
  - c. when listed as a unit
  - d. both b and c
  - e. none of the above

34. In a completed installation each outlet box shall be provided with a cover unless covered by \_\_\_\_\_?
- fixture canopy
  - lamp holder
  - receptacle
  - an of the above
35. Incandescent fixtures with partially enclosed lamps, installed in clothes closets shall \_ permitted as follows.
- surface mounted with a minimum clearance of 12 inches
  - surface mounted with a minimum clearance of 6 inches
  - recessed with the proper clearance
  - not permitted
36. Outlet boxes shall not be used as the sole support for ceiling -suspended (paddle) fans.
- true
  - false
37. A fixture that weighs more than - or exceeds - in any dimension shall be supported by the screw shell of a lamp holder.
- 8 lbs., 16 inches
  - 16 lbs., 8 inches
  - 6 lbs, 16 inches
  - 8 lbs , 18 inches
38. Which of the following is a live part?
- terminals
  - buses or electric conductors
  - components that are uninsulated or exposed and are a shock hazard
  - all of the above
39. The minimum head room of working space about service equipment, switchboards, panel boards, or motor control centers shall be \_\_\_\_\_, not less than the height of the equipment.
- 30 inches
  - 6.5 feet
  - 35 inches
  - 6 feet
40. To be considered for approval, continuing education courses must consist of not less than \_\_\_\_ of instruction and be open to monitoring by the department and/or the electrical board at no charge.
- 4 hrs.
  - 61hrs.
  - 8 hrs.
  - 10 hrs.
41. What should you check if an electrical outlet is not working?
- breaker
  - outlet, if breaker is ok
  - 1st outlet on the line
  - all of the above
42. If a fluorescent light is not working, what should you check?
- Bulbs

- b. Power
  - c. starter/ballast
  - d. any of the above
43. It is ok to touch the glass on a halogen element with your fingers.
- a. true
  - b. false
44. Which of the following is a good sign that a photocell is faulty?
- a. when the lights remain on/off all the time
  - b. when the lights flicker
  - c. when the lights are on during the day and off at night
  - d. all of the above
45. When changing a submerged pool light you should?
- a. Shut off breaker, drain pool below the light and change the bulb
  - b. turn off chlorinator
  - c. Put on a swim suit and dive in
  - d. turn off breaker, raise light from under water to pool deck then change bulb

**PLUMBING:**

46. When should you change a flapper valve on a toilet?
- a. if it is discolored and the edges are curled
  - b. if you hear water leaking from the tank to the bowl
  - c. when doing maintenance on a market ready apartment
  - d. all of the above
47. Which of the following tools would not be used to unstop a toilet?
- a. force cup / plunger
  - b. auger
  - c. seat wrench
  - d. snake
48. Which of the following items would not be found on a typical toilet?
- a. ballcock.
  - b. flapper
  - c. closet boh
  - d. sillcock
49. When should drain acid be used to unstop a toilet?
- a. as a last resort if nothing else works
  - b. pour half a cup in the bowl before using a plunger
  - c. never use in a toilet under any circumstances
  - d. depends on type of toilet
50. What is the primary purpose of a trap on a drain pipe?
- a. to prevent large items from entering the waste line
  - b. to provide access to the waste line
  - c. to prevent sewer gas from escaping into the unit
  - d. to provide easy installation of drain parts

51. Which of the following tools is used to work on hard to reach water supply pipes and faucets behind sink and lavatories?
- strap wrench
  - fixed spud wrench
  - pipe wrench
  - basin wrench
52. Of the following types of rigid copper pipe, which is the one most often used (code permitting) for above ground residential plumbing with soldered joints?
- Type K
  - Type M
  - Type L
  - Type J
53. What is the standard size pipe on a kitchen sink drain?
- 1"
  - 1 ¼"
  - 1 ½"
  - 1 ¾"
54. What is the main purpose of the T & P valve on a water heater?
- maintain constant gas pressure to the burner
  - keep heated water from backing up into the cold water supply system
  - to provide protection against explosion
  - to turn off the gas/electric supply to the burner/element in the event the temperature in the tank exceeds manufacturer's recommended level
55. A water heater makes a thumping noise while heating the water, what could be the problem?
- not completely full of water
  - too much water pressure
  - lime build up
  - they all make this kind of noise
56. A quick way to stop a pipe leak is to use a pipe clamp.
- true
  - false
  - only on a steel or copper pipe
  - never use a pipe clamp
57. If a toilet leaks from the bottom, you should.
- caulk around the base
  - replace the wax seal
  - call a plumber
  - tighten the bolts
58. If the water faucet chatters, what is it caused by?
- faucet not secure
  - all cheap faucets chatter
  - air in system or loose washer
  - water lines in the wall are under sized

59. A water hose that is connected to a faucet and is submerged in a pool is considered as what?
- a time saver
  - a cross connection
  - a hydro gap connection
  - a siphon stop
60. What is the purpose for using flux on copper pipe when soldering?
- it makes the solder stick to the pipe.
  - it lowers the melting point *of* solder
  - it prevents oxidation from forming in the joint
  - it's not necessary

**APPLIANCE REPAIR:**

61. Which of the following refrigerants is used in refrigerators?
- R-22
  - R-123
  - R-12
  - R-502
62. What is the desired temperature for the freezer compartment in a refrigerator?
- 10-32 degrees
  - 10-15 degrees
  - 5-15 degrees
  - 0-8 degrees
63. What is the desired temperature for the fresh food compartment in a refrigerator?
- 28-32 degrees
  - 38-42 degrees
  - 45-48degrees
  - 0-12 degrees
64. When referring to a refrigerator as frost free-it means:
- moisture is not present to create frost
  - a timed heating element melts frost
  - frost is never present
  - mullion heater keeps frost from forming
65. Which of the following is an indication that door gaskets on a refrigerator are "leaking"?
- condensation on outside of refrigerator
  - food spoiling
  - excessive ice build-up
  - all of the above
66. Which of the following could cause abnormally high temperatures in the freezer section of the refrigerator?
- defective defrost thermostat
  - defective defrost limit
  - defective icemaker
  - all of the above

67. What is the most common use of a frost-free refrigerator failure?
- old and worn out
  - not level
  - dirty condenser or bad defrost timer
  - residents overload the refrigerator with food
68. If an oven does not heat up to the required temperature setting, what could be the cause?
- bad door gasket
  - bad thermostat
  - loose electrical connection
  - all of the above
69. What line voltage is necessary for the proper operation of a gas range?
- 240v
  - 12v
  - 24v
  - none of the above
70. What would you check first if a garbage disposal motor did not run but the flywheel turned freely?
- wall switch
  - breaker
  - reset button
  - none of the above
71. Hot water should be used to flush or rinse a garbage disposal?
- always
  - never
  - only with vegetables
  - only with "fatty" waste
72. Which of the following should you check first if a dishwasher does not dry the dishes properly?
- water valve
  - drain solenoid
  - calcium rod heater
  - energy saver switch
73. Which of the following temperature ranges is desirable for the best operation of a dishwasher?
- 115-120 degrees
  - 95-115 degrees
  - 120-140 degrees
  - 105-110 degrees
74. Which of the following would be the probable cause of a dishwasher overflowing?
- defective timer
  - defective pump
  - defective float switch
  - defective water solenoid

75. If the dishwasher will not drain, what could be the problem?
- bad pump solenoid
  - gate arm on pump closed.
  - drain hose clogged
  - all of the above
76. If a dryer makes a loud noise, what should you do?
- clean plastic drum bearing, if worn replace
  - take off the front of the dryer, vacuum and clean it out
  - check the drum guides
  - all of the above
77. If a dishwasher is not getting enough water, what should you check?
- screen at the connection
  - valve turned on
  - timer
  - all of the above
  - both a and b
78. When replacing a hot water tank you should?
- shut off power
  - replace PT valve
  - purge air from new tank
  - all of the above
79. What is the highest temperature a hot water should be set at?
- 100 degrees
  - 110 degrees
  - 120 degrees
  - 130 degrees
80. If a refrigerator is running noisy, what should you check first?
- drain pan
  - condenser fan and motor
  - evaporator fan
  - none of the above
81. Which of the following best describes how to check: an element on a hot water tank?
- disconnect power, meter across the terminals. reading of 0 ohms means it is bad
  - with the power on, meter across the terminals. reading of 0 ohms means it is good
  - remove the element and check it visually
  - none of the above

**POOLS/SPAS:**

82. How many gallons of water are in a rectangular shaped pool that is 20' x 40' x 5'?
- 25,000
  - 30,000
  - 35,000
  - 40,000

83. What is the ideal Ph range for a plaster pool?
- 7.0-7.4
  - 7.4-7.6
  - 7.6-7.8
  - 7.4-7.8
84. What chemical is used to stabilize pool water, which slows down the dissipation of chlorine?
- muriatic acid
  - hydrochloric acid
  - nitrogenic acid
  - cyanuric acid
85. At what level of stabilizer is a pool considered "locked up"?
- 100 ppm
  - 35 ppm
  - 55 ppm
  - 80 ppm
86. What chemical is used to raise Ph in a pool/spa?
- soda ash
  - bicarbonate of soda
  - muriatic acid
  - calcium chloride
87. What is the proper level of total alkalinity in a pool/spa?
- between 60-85 ppm
  - between 70-75 ppm
  - between 80-125 ppm
  - between 90-140 ppm
88. What chemical is used to lower both Ph and total alkalinity in a pool/spa?
- hydrochloric acid
  - cyanuric acid
  - polymeric acid
  - muriatic acid
89. What happens when total alkalinity is too high?
- plaster and metal etching
  - plaster and pipes scale
  - filter plugs easily
  - water line tile discolors
90. What is the ideal level of chlorine for a pool?
- .5 - 1.0 ppm
  - 1.5 - 3.0 ppm
  - 2.0 - 2.8 ppm
  - 2.5 - 3.0 ppm

91. What is the proper chlorine level to obtain good super chlorination?
- 3.0 Ppm.
  - 7.0ppm
  - 15.0 ppm
  - 25.0 ppm
92. What is the primary indicator used to determine when filters should be backwashed?
- jandy valves
  - flow meters
  - pressure gauges
  - pumps
93. What device is used to control the flow of water through a pool filter?
- jandy valve
  - gate valve
  - flow valve
  - multiport valve
94. Turnover rate is the movement of the entire volume of pool water through one complete cycle of the recirculatory system. What is the required turnover rate for public pools?
- 6 times in a 24 hour period
  - 4 times in a 24 hour period
  - 3 times in a 24 hour period
  - 2 times in a 24 hour period
95. What is the recommended maximum temperature for spas?
- 95 degrees
  - 100 degrees
  - 108 degrees
  - 104 degrees
96. What diameter ball would you use to test the distance between bars in a pool fence?
- 3"
  - 4"
  - 5"
  - 6"
97. When testing a pool gate to see that it is self-closing and latching, you should hold the gate open to what distance?
- 6" to 12"
  - 12" to 24"
  - 24" to 36"
  - over 36"
98. What three (3) ingredients are critical to pin proper water balance in a pool or spa?
- PH, chlorine residual, stabilizer
  - PH, total alkalinity, calcium hardness
  - PH, total dissolved solids, chlorine
  - stabilizer, chlorine, total alkalinity

99. What is the only way to lower the cyanuric acid level in a pool?
- a. add muriatic acid
  - b. clean the filter
  - c. drain the pool part way and add fresh water
  - d. add calcium chloride
100. When checking pool chemicals you should always check the PH first.
- a. true
  - b. false
  - c. not enough information

**THANK YOU FOR YOUR TIME**





<b>List of Exhibits for Chapter 11</b>
Exhibit 11.1 – Purchase Order Approval Form
Exhibit 11.2 – Request for Quotes for Small Purchases
Exhibit 11.3 – Vendor Registration Form



**Exhibit 11.2 Request for Quotes**

Property Name: \_\_\_\_\_  
Property Address: \_\_\_\_\_  
City, State, Zip \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
E-Mail: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_

Scope of Services:

1. The PHA will select the lowest, most responsive and responsible quoter.
2. Due date and local time: \_\_\_\_\_
3. Number of copies to submit: \_\_\_\_\_
4. Place of submission: \_\_\_\_\_
5. Submission requirements: Respondents must complete the attached quote sheet.
6. Form of submission: Quotes may be mailed, hand-delivered, e-mailed, or faxed.
7. Date work to commence: \_\_\_\_\_
8. Date work to be completed: \_\_\_\_\_
9. MBE/WBE/DBE Policy: It is the policy of the PHA to encourage responses from MBE/WBE/DBE contractors. It is the goal of the PHA to increase its minority contract base. All contractors that qualify are encouraged to register with the local, city, or state office of the Department of Equal Opportunity (DEO) or, if local, to register with the City's DEO, 999-888-7777.
10. Invoicing Method: Upon satisfactory completion of the work, the vendor shall submit an invoice, along with the work ticket signed by the Housing Manager, to address listed at the top of this request.
11. Terms: Payment will be made in full within 30-days of invoice provided (a) satisfactory completion, and (b) compliance with all requirements of the quote/contract.

12. Wage Determinations (check if applicable):

- Payment of HUD-Determined Maintenance Wages: The PHA has determined that this contract qualifies as a maintenance contract that is subject to certain HUD-determined wages. To that end, attached is a bid addendum containing the appropriate minimum maintenance wages rates that must be paid in connection with this contract and related provisions.
- Payment of Davis-Bacon Wage Rates: The PHA has determined that this contract qualifies as a construction contract that is subject to Davis-Bacon, to that end, attached is a bid addendum containing the appropriate minimum wage rates that must be paid in connection with this contract and related provisions.

13. Any contract of \$25,000 or more requiring labor in the performance of a service, or construction or installation, is subject to Section 3 of the Housing Act of 1968. Any such Section 3-covered contracts should read carefully the attached Section 3 addendum (if applicable).

14. Insurance Requirements: A current certificate of insurance is required with each quote and before the commencement of any work, the following dollar limits must be satisfied:

- Vehicular liability of \$1 million minimum per incident (all vendors)
- General liability of \$1 million minimum per incident (excludes supplies and materials)
- Workers compensation consistent with all statutory requirements (all vendors)
- The Certificate of Insurance names the PHA as additional insured.

15. Examination and Retention of Contractor's Records. The Housing Authority (HA), HUD, or Comptroller General of the United States, or any of the duly authorized representatives shall, until three years after the final payment under this contract, have access to and the right to examine any of the Contractor's directly pertinent books, documents, papers, or other records involving transactions related to this contract for the purpose of making audit, examination, excerpts, and transcriptions.

16. Right in Date and Patent Rights (Ownership and Proprietary Interest). The HA shall have exclusive ownership of all proprietary interest in, and the right to full and exclusive possession of all information, materials, and documents discovered or produced by Contractor pursuant to the terms of this Contract, including but not limited to reports, memoranda or letters concerning the research and reporting tasks of this Contract.

17. Energy Efficiency. The Contactor shall comply with all mandatory standards and policies relating to energy efficiency which are contained in the energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub.L. 94-163) for the State in which the work under this contract is performed.

18. Termination for Cause and for Convenience (contracts of \$10,000 or more).

(a) The HA may terminate this contract in whole, or from time to time in part, for the HA's convenience or the failure of the Contractor to fulfill the contract obligations (cause/default). The HA shall terminate by delivering to the Contractor a written notice of Termination specifying the nature, extent, and effective date of the termination. Upon receipt of the notice, the Contractor shall: (1) immediately discontinue all services affected (unless the notice directs otherwise), and (2) deliver to the HA all information, reports, papers, and other materials accumulated or generated in performing the contract, whether completed or in process.

(b) If the termination is for the convenience of the HA, the HA shall be liable only for payment for services rendered before the effective date of the termination.

(c) If the termination is due to the failure of the Contractor to fulfill its obligations under the contract (cause/default), the HA may (1) require the Contractor to deliver to it, in the manner and to the extent directed by the HA, any work described in the Notice of Termination; (2) take over the work and prosecute the same to completion by contract or otherwise; and the Contractor shall be liable for any additional cost incurred by the HA; and (3) withhold any payments to the Contractor, for the purpose of set-off or partial payment, as the case may be, of amounts owed by the HA to the Contractor. In the event of termination for cause/default, the HA shall be liable to the Contractor for reasonable costs incurred by the Contractor before the effective date of termination. Any dispute shall be decided by the Contracting Officer.

PHA is an equal opportunity contractor and employer.

Attachments (check if applicable):

- Quote tab sheet (Quote shall be submitted in this format. Other submissions will not be accepted.)
- Wage determination
- Wage addenda
- Section 3

End of Request for Quotes.

**QUOTE SHEET**

Name of Service Requested: \_\_\_\_\_

Date of Request for Quotes: \_\_\_\_\_

Time/Date Quotes Due: \_\_\_\_\_  am  pm on \_\_\_\_\_

Quote: \_\_\_\_\_

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Company Phone: \_\_\_\_\_

Company Fax: \_\_\_\_\_

Reference 1: \_\_\_\_\_

Reference 2: \_\_\_\_\_

Reference 3: \_\_\_\_\_

Person Preparing Response: \_\_\_\_\_

I certify that my firm will supply the above items/services in accordance with the terms provided in the Respective Request for Quote.

Signature of authorized Representative Preparing Response:

\_\_\_\_\_ Date: \_\_\_\_\_

**END**

**Exhibit 11.3 Vendor Registration Form**

Date: 7/25/05 Property: Meadowood Farms Apartment

Business Name: ABC Vendors

Is your business incorporated?: \_\_\_\_\_ Yes or X No (Check one)

Federal Tax ID #: 91-2345678 (Not State UBI #)

Mailing Address: 12340 Main Street

Suite A-1

Seattle, WA 98188-3103

Phone Number: 206/555-5555

Fax Number: 206/555-5556

Business Owner's Full Name (Print): Arnold B. Curry

Business Owners' Social Security #: \_\_\_\_\_

Contractors License #: ABCVEND001N7

Expiration Date: 3/18/2006

**ALL VENDORS MUST HAVE A BUSINESS LICENSE, INSURANCE IN THEIR BUSINESS NAME AND A COMPLETE VENDOR REGISTRATION PACKAGE**

- Attach Business License
- Attach copy of Insurance
- Attach W-9
- Attach a copy of Contractor's license (MUST have for interior/exterior painting, paving, electrical work, plumbing work, carpentry – verify with your Portfolio Manager if you are not sure)

Is this vendor related to you or a staff member by blood or marriage? Yes  No

Who referred you to this vendor? \_\_\_\_\_ at \_\_\_\_\_ Apts

Is this vendor an Agency, Inc. employee? Yes  No

If yes, where: \_\_\_\_\_



**List of Exhibits for Chapter 13**

Exhibit 13.1 – Sample Job Descriptions

## **Exhibit 13.1 Sample Job Descriptions**

## **REGIONAL PROPERTY MANAGER**

### **Job Description**

This job description is a basic outline and must be used in conjunction with the Authority's On-Site Procedures Manual.

### **Scope and Purpose**

---

To be responsible, under the direction of the Director of Public Housing, for overseeing the operation of a group of properties through subordinate personnel, and monitor fiscal and occupancy status for properties through regular reports. The Regional Property Manager is responsible for direct budget preparation, monitoring budgets, preparing reports of activities and fiscal status, monitoring operating practices and procedures and recommending changes to promote efficiency, participating in pre-employment interviews, supervising, evaluating performance and training site personnel.

### **Duties and Responsibilities**

---

#### ***General Administration:***

- Monitor collections, collection loss, vacancy reports, court filings, etc. through computer generated and manual reporting systems, conversations, and meetings.
- Review and take appropriate action on resident transfer requests.
- Provide assistance and direction in the development of the annual budget.
- Monitor budget through monthly reports and provide input regarding status of budget as needed.
- Ensure that resident lease terminations and grievance hearings are properly processed.
- Monitor lease enforcement by providing information and assistance as needed.
- Meet with residents, resident organizations, and external agencies to receive input regarding the operation of housing programs, assess needs, and address concerns.
- Conduct informal hearings as needed, and make appropriate recommendations in accordance with the Authority's policies and procedures.
- Oversee the development and implementation of marketing plans and strategies in order to promote high levels of occupancy.
- Ensure that residents receive available services by cooperating with service providers to deliver services to residents.
- Oversee schedule for emergency on call responsibility and follow-up on emergencies to ensure proper handling.
- Assist subordinates in handling difficult or complex problems with residents by offering alternatives and working directly with residents as needed.
- Preparation and submission of monthly report detailing the prior month's occupancy and fiscal performance.

### ***Supervision of General Property Management and Maintenance:***

- Participate in pre-employment interviews and make hiring recommendations as needed. Although the Regional Manager would typically only interview the Housing Manager, there may be times when interviews of other site personnel is warranted.
- Interpret and apply Authority personnel policies, departmental policies, and other relevant policies and procedures.
- Monitor performance of subordinates through periodic inspections of properties and information reports.
- Review and approve time and leave reports for assigned staff, and approve leave requests.
- Conduct or coordinate training programs for all new employees, and periodic training for other employees.
- Coordinate staffing to assure that all properties are adequately staffed.
- Prepare and review performance appraisals and discuss with subordinates as appropriate.
- Counsel employees regarding job performance and document in accordance with established procedures.
- Recommend disciplinary action as needed.
- Conduct periodic staff meetings.
- Monitor and analyze the effectiveness of policies and procedures, and prepare revisions and recommend changes as needed.

### **Skill Requirements**

---

- Knowledge of Authority policies and procedures, particularly as they pertain to property management.
- Knowledge of Department of Housing and Urban Development ("HUD") rules and regulations that apply to property management.
- Knowledge of laws and standards that apply to property management, such as Fair Housing Laws, Landlord-Tenant Law, OSHA Standards, local and state building codes.
- Basic knowledge of building maintenance, fire prevention and liability reduction principles.
- Knowledge of basic office practices, procedures, and equipment.
- Knowledge of the principles of management and supervision.
- Knowledge of the operation of the Authority's computer system and software.
- Knowledge of the agencies that provide assistance and services to residents, including some knowledge of eligibility requirements.
- Knowledge of basic English in order to communicate verbally and in writing.
- Knowledge of mathematics sufficient to perform calculations required for summarizing rent collections, making deposits, and for rent adjustments.
- Ability to maintain required records such as tenant files, vacancy reports, etc.
- Ability to read and interpret policies and guidelines in order to make sound decisions.
- Ability to prepare clear, concise reports and make appropriate recommendations within scope of responsibility.
- Ability to use basic office equipment such as telephone, fax, copier and computer.
- Ability to communicate verbally and in writing.

- Ability to generate records, receipts, and reports efficiently using a calculator and the computer system.
- Ability to establish and maintain effective working relationships with peers, superiors, residents, community service agencies, and the public.
- Ability to manage multiple priorities and multiple demands to accomplish tasks in accordance with established requirements.
- Skilled in analyzing situations in order to identify problems and offer possible solutions.
- Skilled in communicating with all types of people in a wide variety of situations.

### **Qualifications for this Position**

---

- Bachelor's degree in management, business administration, social science area, or closely related field.
- Minimum of five years experience in property management (preferably, some in public housing) and experience involving public contact preferred.
- Certification as a Public Housing Manager.
- Neat, clean and appropriate appearance.
- Valid Driving License and automobile insurance.
- Must provide automobile for local job-related travel and pick-up.

**NOTE:** This job description should not be interpreted as all-inclusive. It is intended to identify the major responsibilities and requirements of this job classification.

## HOUSING MANAGER

### Job Description

This job description is a basic outline and must be used in conjunction with the Authority's On-Site Procedures Manual.

### Scope and Purpose

---

To be responsible, under the direction of the Regional Manager, for the overall management of site operations and supervision of maintenance of the physical plant. Above all else, the spirit of teamwork and cooperation with other team members will not only improve the job you do, but enhance the entire work experience.

### Duties and Responsibilities

---

#### ***General Administration:***

- Collect rents and maintain computer records according to the Authority's On-Site Procedures Handbook.
- Process requests for rent adjustments in accordance with established procedures, including obtaining verifications, entering information into computer, etc.
- Prepare and monitor site budget.
- Post charges associated with work order, late charges, etc. by entering them in computer and generating notices fore residents.
- Follow-up delinquent accounts and pursue collections in accordance with established procedures
- Monitor expenses to ensure spending is within guidelines.
- Maintain tenant files and related documentation regarding continuing eligibility and adjustments.
- Show vacant apartments utilizing professional marketing procedures, and maintain a high level of continued occupancy by leasing property in a timely manner.
- Check references and other information on resident applications through Authority's approved credit and criminal investigative service.
- Complete Rental Agreements.
- Make daily bank deposits.
- Prepare reports in accordance with established procedures.
- Complete move-in and move-out reports, and send move in and move out packages to Property Accountant for permanent filing and disbursement of security deposits.
- Address resident concerns in a professional manner.

- Send/Post all notices regarding compliance to rules and regulations when a violation occurs.
- Hire, train, supervise and (sometimes) terminate site staff.
- Issue purchase order numbers and track purchases from order through invoice.
- Process invoices for correctness, accuracy, and proper coding.
- Purchase office supplies and other administrative supplies for the property.
- Maintain and reconcile the property's petty cash fund.
- Maintain and reconcile the property's declining budget.
- Write advertisements if needed, obtain prices and place advertisements (with Property Manager's approval) in the appropriate publications for best exposure for the community.
- Establish and maintain a waiting list per established procedures.
- Complete and submit incident reports for all events that may involve injury or damage.
- Maintain the property business office in a neat, orderly and business-like manner at all times with regularly scheduled office hours per established procedures.

***General Repair and Maintenance Including Grounds Maintenance:***

- Oversee maintenance of the grounds, trash container areas, and common areas not allowing any trash or debris to accumulate.
- Oversee all work associated with the upkeep and maintenance of the grounds.
- Be sure all vacant apartments are cleaned immediately and made ready for showing and occupancy within three days after move out.
- Log all resident complaints and dispatch maintenance personnel promptly. Items covered under warranties should be reported to the appropriate maintenance companies and followed up for prompt repairs.
- Generate work orders in response to requests for repairs from residents, coordinate completion of repairs, and close out work orders in accordance with established procedures.
- Conduct property inspections, including move-in, housekeeping, and grounds in order to assure adherence to established standards.
- Maintain records of the status of assigned units, e.g. filled, vacant, anticipated vacancy, etc.
- Assist with security activities by communicating with security personnel regarding specific problems, and participating in "knock and talk", as needed.
- Be available at all times either personally, or through other site personnel, for emergency calls.
- Maintain community-owned materials and tools in a neat and orderly manner at all times.
- Maintain a neat and organized workshop area free of clutter and debris for these tools. Upon completion of a maintenance task, all tools and excess supplies shall be cleaned up and stored properly.

***Tenant Relations:***

- Counsel residents who are not complying with the terms of the lease, and concerning delinquent payments.
- Refer residents with special problems, such as economic, social, legal, health, etc. to groups or agencies that provide assistance, or to resident services coordinator, as appropriate.
- Maintain liaison with resident services coordinator to assist with resident activities, address specific problems, plan meetings, or support activities as appropriate.

- Resolve conflict and complaints among residents, if possible, in order to avoid grievances.
- Recommend eviction if resident behavior warrants, and prepare related documentation to support recommendation.
- Schedule and complete customer surveys in order to identify resident needs, assess quality of services, etc.
- Participate in hearings and appeals as needed.

***Supervising Personnel:***

- Participate in pre-employment interviews and make hiring recommendations as needed.
- Interpret and apply personnel policies, departmental policies, and other relevant policies and procedures.
- Review time and leave reports for assigned staff.
- Train or assist in training other site personnel.
- Prepare and review performance appraisals and discuss with subordinates as appropriate.
- Counsel employees regarding job performance and document in accordance with established procedures.
- Recommend disciplinary action as needed.
- The Housing Manager is authorized to delegate authority to key employees. Any such delegation must be approved by the Property Manager. The Housing Manager's responsibility is always primary, even for activities delegated to subordinates.

**Skill Requirements**

---

- Knowledge of Authority policies and procedures, particularly as they pertain to property management.
- Knowledge of Department of Housing and Urban Development ("HUD") rules and regulations that apply to property management.
- Knowledge of laws and standards that apply to property management, such as Fair Housing Laws, Landlord-Tenant Law, OSHA Standards, local and state building codes.
- Basic knowledge of building maintenance, fire prevention and liability reduction principles.
- Knowledge of basic office practices, procedures, and equipment.
- Knowledge of the principles of management and supervision.
- Knowledge of the operation of the Authority's computer system and software.
- Knowledge of the agencies that provide assistance and services to residents, including some knowledge of eligibility requirements.
- Knowledge of basic English in order to communicate verbally and in writing.
- Knowledge of mathematics sufficient to perform calculations required for summarizing rent collections, making deposits, and for rent adjustments.
- Ability to maintain required records such as tenant files, vacancy reports, etc.
- Ability to procure goods and services in accordance with Authority procedures and in keeping with the assigned Operating Budget for the property.
- Ability to read and interpret policies and guidelines in order to make sound decisions.

- Ability to prepare clear concise reports and make appropriate recommendations within scope of responsibility.
- Ability to use basic office equipment such as telephone, fax, copier and computer.
- Ability to communicate verbally and in writing.
- Ability to generate records, receipts, and reports efficiently using a calculator and the computer system.
- Ability to establish and maintain effective working relationships with peers, superiors, residents, community service agencies, and the public.
- Ability to manage multiple priorities and multiple demands to accomplish tasks in accordance with established requirements.
- Skilled in analyzing situations in order to identify problems and offer possible solutions.
- Skilled in communicating with all types of people in a wide variety of situations.

### **Qualifications for this Position**

---

- High school education or equivalent.
- Experience in property management and experience involving public contact preferred.
- Must obtain certification as a Public Housing Manager, or equivalent, within twelve (12) months of employment.
- Valid driver's license
- Use of personal automobile for local job-related travel and pick-up.
- Neat, clean and appropriate appearance.

**NOTE:** This job description should not be interpreted as all-inclusive. It is intended to identify the major responsibilities and requirements of this job classification.

## **ASSISTANT MANAGER**

### **Job Description**

This job description is a basic outline and must be used in conjunction with the Authority's On-Site Procedures Manual.

### **Scope and Purpose**

To work with the Housing Manager in the general administration of the property and perform all related secretarial/clerical functions as requested by the Housing Manager.

### **Duties and Responsibilities**

- Maintain a professional image and attitude in keeping the objectives of the Authority and residents' welfare.
- Prepare and maintain complete resident files.
- Maintain general office files.
- Assist in advertising preparation.
- Type letters and memos.
- Assist in showing units and screening applicants.
- Assist in scheduling vacant units for refurbishing and occupancy.
- Assist in maintenance work order system and in following purchase order procedures.
- Assist in certifying residents' income.
- Assist in maintaining the required computer postings.
- Prepare late notices and notices to pay rent.
- Order office supplies within established budgeted guidelines.
- Maintain tickler files for annual apartment inspections.
- Assist in keeping the apartment condition and status chart up-to-date.
- Assist in annual unit inspection process.
- Assist in typing and/or maintaining weekly and monthly reports.
- Assist in collection of rents and preparation of receipts.
- Assist in adherence to the Policy Handbook and Procedures Manual.
- Work with manager regarding legal proceedings.
- Assist in maintaining all required inventories for project supplies and equipment.
- Maintain records of rental levels of comparable units in surrounding areas.
- Answer the phone pleasantly and professionally.
- Maintain courteous communication with residents, applicants, and representatives of other companies.

## Qualifications for this Position

---

- Strong organizational skills.
- High school education or its equivalent.
- Accurate typing.
- Accurate use of ten-key calculator, fax machine, computer and other office equipment.
- Full-time secretarial experience (in real estate field preferably).
- Well groomed.
- Ability to work well with and understand the problems of residents.
- Capable of assisting in the performance of the Housing Manager's duties on his/her days off.
- Ability to complete tenant certifications.

## **MAINTENANCE SUPERVISOR**

### **Job Description**

This job description is a basic outline and must be used in conjunction with the Authority's On-Site Procedures Manual.

### **Scope and Purpose**

---

To be responsible, under the direction of the Housing Manager, for the overall maintenance of the physical plant. When applicable, the Maintenance Supervisor will oversee the performance of other maintenance personnel who are working alongside or in conjunction with the Maintenance Supervisor.

### **Duties and Responsibilities**

---

#### ***General:***

- Maintain a professional image and attitude in keeping with the objectives of the Authority and residents' welfare.
- Report to the Housing Manager each morning to communicate daily needs of the property and before and after breaks and lunch hour.
- Report any observed problems in units or on the property to the Housing Manager.
- Wear uniform shirt and identification as provided/directed by the Housing Manager and/or Regional Manager. Jeans or khaki pants may be worn that are in good condition and free of dirt, paint and holes. Work boots and/or tennis shoes may be worn; however, sandals are not allowed.
- Supervise any subordinate maintenance staff of the site.
- Recommend, when appropriate, the use of outside contractors for some projects and supervise their work.
- Maintain records and prepares reports in accordance with regulations.
- Participate in the hiring process by interviewing candidates and making hiring recommendations.
- Make recommendations for changes in policies and procedures in response to changing conditions, requirements, regulations or technology.
- Assist in preparations of maintenance budget for the site.
- Regularly conduct inventory of equipment, tools, parts and supply of materials.

In the event a property requires multiple maintenance personnel, the Maintenance Supervisor is responsible for overseeing the following work tasks, and may be involved in the actual labor to complete the same. In addition, the Maintenance Supervisor is responsible for coordinating the crew, assessing employee performance, hiring, reviewing time and leave reports, performing appraisals of staff, and ensuring that staff are properly trained.

***Physical Requirements:***

- Physical aspects of the job may require heavy lifting, bending, pushing, pulling, kneeling, stooping, climbing, balancing, and carrying.

***Grounds:***

- Keep or ensure that the grounds, garbage container areas, hallways, garages and/or parking lots, in a neat and orderly manner not allowing any trash or debris to accumulate. Patrol these areas every morning and continually throughout the day. Depending on the property, you may be required to vacuum and/or blow hallways, parking areas and/or breezeways as necessary. The direct supervisor will determine the frequency of these duties. Some properties may require these tasks daily.
- Oversee and assist all work associated with the upkeep of the grounds.

***Curb Appeal:***

- Assist management/leasing staff with curb appeal which may include detailing model units, putting out balloons, banners, a-boards, etc.

***Work Orders:***

- Work orders are to be recorded in the work order system. Permission to enter must be given by the resident. Work orders are to be properly completed within 24 hours unless parts or outside repair by a contractor must be secured. If a work order is not completed within 24 hours, the resident must be notified in writing as to the anticipated completion date. Leave the resident a copy of the completed work order in the unit and return one copy to the office for filing OR leave the resident copy of the incomplete work order with the estimated completion date. Once completed, the work order can be returned to the office for filing.
- Maintain and periodically analyze work orders for consistent patterns or long-term maintenance concerns.
- Always report questionable activity, unsanitary conditions, unauthorized occupants and/or pets to the Housing Manager.

***Building & Common Area Maintenance:***

- Regular maintenance of the building exteriors, building interiors and common areas are the responsibility of the Maintenance Supervisor and include but are not limited to pressure-washing as needed, painting and maintenance of all building systems such as gutters and downspouts, roof drainage systems, French drain systems, surface water management systems, fire alarm systems, fire extinguishers, fire sprinkler systems, signage, laundry centers, playgrounds, tennis courts, sports courts, and any other common areas, etc. The Maintenance Supervisor should conduct a monthly check of all property systems to determine the maintenance needs of any aspect of housing units, including major equipment.
- Assist in the procurement of outside contractors when necessary and help establish general guidelines and priorities in the contractor's projects.
- Participate in annual inspection of units to determine the need for preventative and restorative repairs.

- Perform a wide variety of electrical, plumbing, carpentry, and preventative maintenance tasks, as needed.
- Crawl spaces and venting areas are especially susceptible to stray cats, insects, birds and rodents. A monthly check that all areas are sealed should be conducted with supplemental pest control called should the need arise.
- Maintenance staff should take care of pest control such as for wasps, bees and fleas (unless the nest is too large and present a danger to the staff and/or resident). All other pest control needs such as for rodents, cockroaches, silverfish, ants; etc. should be assessed and taken care of by a professional pest control vendor.
- Empty lint filters in common area laundries at least once per week.

***Parking Areas:***

- Parking areas are to be maintained in a clean and safe manner. Speed bumps, fire lanes and parking stalls should always be crisply painted. Any potholes should be addressed immediately with cold patch, with larger jobs being bid by asphalt contractors.

***Inventory, Tools & Supplies:***

- The Maintenance staff should supply their own basic tools such as a hammer, screwdrivers, drill, etc. Specialty tools used for property purposes may be purchased with the approval of the Regional Manager only.
- Keep an inventory on all parts and tools belonging to the property. Maintain property-owned materials and tools in a neat and orderly manner at all times. Maintain a neat and organized workshop area free of clutter and debris. Upon completion of maintenance task, all tools and excess supplies shall be cleaned up and stored appropriately.

***Bids & Vendors:***

- Larger projects that will likely cost over \$500 such as re-paving, exterior paint, roof replacements and the like requires bid specifications be prepared and at least three bids for the same work/same product are obtained. Occasionally, bid specifications may require a consultant's expertise to prepare, which should be discussed with the Regional Manager prior to obtaining such services.
- The Authority takes great pride in the relationship developed with many vendors. The Authority expects each staff member to treat vendors with respect, fairness and honesty. The Authority does not allow 'kick-backs' or gifts from vendors.
- The Authority does not use any vendor 'exclusively'.
- The Authority does not ever allow vendors to charge materials or anything on property accounts.

***Turnovers:***

- Vacant units are to be turned and made market ready within 3 days of the prior resident's move-out. Maintenance staff schedules may be varied to accommodate the turnover schedule when the 1<sup>st</sup> day of the month falls on a weekend. Status of vacant units should be reported on a board in the management office.

- During the 3<sup>rd</sup> week of every month, pre-inspect any units on notice to vacate and assess what maintenance supplies will be necessary to return the units to market ready status. Prepare a supply order in writing and turn it in to the Housing Manager for order placement and approval.
- At the discretion of the Housing Manager and/or Regional Manager and depending on size of property and number of turnovers, maintenance personnel may be required to paint units.
- Vendor scheduling may be done by the Maintenance Supervisor at the discretion of the Housing Manager and/or Regional Manager to include painters, cleaners and carpet cleaners.
- Change the lock(s) on all vacant unit doors, once vacant, and make or have made any necessary keys. Occupied unit keys may require changing periodically depending upon the situation.

#### ***Vehicle use/Mileage/Supply transport***

- A few properties may have either a maintenance vehicle or maintenance golf-cart. These vehicles are to be driven only by approved licensed drivers with a clean driving record. These vehicles are to be used on the property only for the transport of supplies. Residents are not allowed in or on the vehicles at any time. The vehicles are to be maintained in a neat and orderly manner at all times. Abuse or misuse of vehicles may cause the elimination of the vehicle and/or revocation of driving privileges.
- For those properties that do not have a vehicle provided to transport supplies, other carts, dollies or similar apparatus may be used. It is not recommended that personal vehicles be used and mileage for travel on the property is not reimbursed.
- Mileage is only reimbursed for those round-trips totaling 10 miles or more at one time. Mileage reimbursement is reserved for special trips, not for regular trips to pick up supplies. Should the need arise for mileage reimbursement, complete the provided form and turn in monthly. Mileage is paid through accounts payable, not through payroll.

#### ***On-call Emergencies:***

- The Maintenance Supervisor and Maintenance Assistant must be available to take emergency calls on a 7-day rotating basis. The staff person on-call will be equipped with a digital pager and is required to return pager calls within 10 minutes of the page.
- Maintenance staff must never respond to an emergency page while intoxicated or after consuming alcohol.
- On call emergencies are considered anything involving life-safety issues, floods, fires, earthquakes, other natural disasters or major destruction or threat to the physical property.
- Maintenance staff are never allowed to carry weapons.

#### ***Safety:***

- All staff must strictly adhere to safety policies and procedures to prevent on the job injuries and maintain a safe work and living environment. Additional safety training is available through the Authority office. Arrangements can be made through your Regional Manager.

### **Skill Requirements**

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- Knowledge of the principles of management and supervision.

- Knowledge of HUD regulations regarding housing quality standards and other maintenance related standards.
- Knowledge of the Authority's policies and procedures.
- Knowledge of the physical layout of the site.
- Knowledge of building and grounds maintenance, including standard practices, methods, tools, materials, electrical, plumbing, HVAC, painting, carpentry, and grounds keeping.
- Knowledge of safety rules, including accident causation and prevention.
- Knowledge of occupational hazards and appropriate safety precautions.
- Ability to supervise a comprehensive maintenance program for a public housing site.
- Ability to analyze information from inspections in order to determine the maintenance needs, and the quality of maintenance services provided.
- Ability to develop plans and procedures for efficient and timely completion of work.
- Ability to maintain records in an orderly fashion.
- Ability to communicate effectively orally and in writing.
- Ability to establish and maintain effective working relationships with supervisor, subordinates, co-workers, residents, contractors, and the general public.
- Ability to prepare recommendations and reports, as required.
- Ability to read, understand and work from sketches and blueprints.
- Ability to understand oral and written instructions.

### **Qualifications for this Position**

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- High school education or equivalent.
- Experience in multifamily maintenance and experience involving public contact preferred.
- Valid driver's license and current vehicle insurance.
- Use of personal automobile for local job-related travel and pick-up, or ability to drive pickup truck and van.
- Neat, clean and appropriate appearance.
- Maintenance personnel must provide tools needed to perform routine maintenance tasks.
- Some type of formal training or experience in the following areas: carpentry; light plumbing work; light electrical work; painting; refurbishing and Authority's "Maintenance Test".
- Willingness to pitch in and work in areas other than repairs and maintenance, i.e. janitorial, custodial, gardening, painting, etc.
- Physical aspects of the job may require heavy lifting, bending, kneeling, stooping, climbing, balancing, and carrying.

**NOTE:** This job description should not be interpreted as all-inclusive. It is intended to identify the major responsibilities and requirements of this job classification.

## **MAINTENANCE TECNICIAN/ASSISTANT**

### **Job Description**

This job description is a basic outline and must be used in conjunction with the Authority's On-Site Procedures Manual.

### **Scope and Purpose**

To be responsible, under the direction of the Housing Manager and/or Maintenance Supervisor, for the overall maintenance of the physical plant. Because of the importance of assuring the successful management of the maintenance staff, the maintenance technician/assistant must be trained to perform the duties of the Maintenance Supervisor and provide support and cooperation in completing all work items. Above all else, the spirit of teamwork and cooperation with other team members will not only improve the job you do, but enhance the entire work experience.

### **Duties and Responsibilities**

#### ***General:***

- Maintain a professional image and attitude in keeping with the objectives of the Authority and residents' welfare.
- Report to the Housing Manager and/or Maintenance Supervisor each morning to communicate daily needs of the property and receive daily assignments.
- Report any observed problems in units or on the property to the Housing Manager.
- Wear uniform shirt and identification as provided/directed by the Housing Manager and/or Regional Manager. Jeans or khaki pants may be worn that are in good condition and free of dirt, paint and holes. Work boots and/or tennis shoes may be worn; however, sandals are not allowed.

#### ***Physical Requirements:***

- Physical aspects of the job may require heavy lifting, pushing, pulling, bending, kneeling, stooping, climbing, balancing, and carrying.

#### ***Grounds and Curb Appeal:***

- Keep or ensure grounds, garbage container areas, hallways, garages and/or parking lots in a neat and orderly manner, not allowing any trash or debris to accumulate. Patrol these areas every morning and continually throughout the day. Depending on the property, you may be required to vacuum and/or blow hallways, parking areas and/or breezeways as necessary. The direct supervisor will determine the frequency of these duties. Some properties may require these tasks daily.
- Assist management/leasing staff with curb appeal which may include detailing model units, putting out balloons, banners, a-boards, etc.
- Oversee and assist all work associated with the upkeep of the grounds.

### ***Work Orders***

- Work orders are to be recorded in the work order system. Permission to enter must be given by the resident. Work orders are to be properly completed within 24 hours unless parts or outside repair by a contractor must be secured. If a work order is not completed within 24 hours, the resident must be notified in writing as to the anticipated completion date. Leave the resident a copy of the completed work order in the unit and return one copy to the office for filing OR leave the resident copy of the incomplete work order with the estimated date of completion and return one copy to the office.
- Maintain and periodically analyze work orders for consistent patterns or long-term maintenance concerns.
- Always report questionable activity, unsanitary conditions, unauthorized occupants and/or pets to the Housing Manager.

### ***Building & Common Area Maintenance:***

- Regular maintenance of the building exteriors, building interiors and common areas directed by the Maintenance Supervisor and include but are not limited to pressure-washing as needed, painting and maintenance of all building systems such as gutters and downspouts, roof drainage systems, French drain systems, surface water management systems, fire alarm systems, fire extinguishers, fire sprinkler systems, signage, laundry centers, playgrounds, tennis courts, sports courts, and any other common areas, etc.
- When requested, participate in annual inspection of units to determine the need for preventative and restorative repairs.
- Perform a wide variety of electrical, plumbing, carpentry, and preventative maintenance tasks, as needed/requested.
- Maintenance staff should control for pests such as wasps, bees and fleas (unless the nest is too large and presents a danger to the staff and/or resident). All other pest control needs, e.g., rodents, cockroaches, silverfish, ants, etc., should be assessed and taken care of by a professional pest control vendor.
- Empty lint filters in common area laundries at least once per week.

### ***Parking Areas:***

- Parking areas are to be maintained in a clean and safe manner. Speed bumps, fire lanes and parking stalls should always be crisply painted. Any potholes should be addressed immediately with cold patch, with larger jobs being bid by asphalt contractors.

### ***Inventory, Tools & Supplies:***

- The Maintenance staff should supply their own basic tools such as a hammer, screwdrivers, drill, etc. Specialty tools used for property purposes may be purchased with the approval of the Regional Manager only.
- Maintain property-owned materials and tools in a neat and orderly manner at all times. Maintain a neat and organized workshop area free of clutter and debris. Upon completion of maintenance task, all tools and excess supplies shall be cleaned up and stored appropriately.

***Vendors:***

- The Authority takes great pride in the relationship developed with many vendors. The Authority expects each staff member to treat vendors with respect, fairness and honesty. The Authority does not allow 'kick-backs' or gifts from vendors.
- The Authority does not use any vendor 'exclusively'.
- The Authority does not ever allow vendors to charge materials or anything on property accounts.

***Turnovers:***

- Vacant units are to be turned and made market ready within 3 days of the prior resident's move-out. Maintenance staff schedules may be varied to accommodate the turnover schedule when the 1<sup>st</sup> day of the month falls on a weekend. Status of vacant units should be reported on a board in the management office.
- During the 3<sup>rd</sup> week of every month, pre-inspect any units on notice to vacate and assess what maintenance supplies will be necessary to return the units to market ready status. Prepare a supply order in writing and turn it in to the Housing Manager for order placement and approval.
- At the discretion of the Housing Manager and/or Maintenance Supervisor, and depending on size of property and number of turnovers, maintenance personnel may be required to paint units.
- Change the lock(s) on all vacant unit doors, once vacant, and make or have made any necessary keys. Occupied unit keys may require changing periodically depending upon the situation.

***Vehicle use/Mileage/Supply transport***

- A few properties may have either a maintenance vehicle or maintenance golf-cart. These vehicles are to be driven only by approved licensed drivers with a clean driving record. These vehicles are to be used on the property only for the transport of supplies. Residents are not allowed in or on the vehicles at any time. The vehicles are to be maintained in a neat and orderly manner at all times. Abuse or misuse of vehicles may cause the elimination of the vehicle and/or revocation of driving privileges.
- For those properties that do not have a vehicle provided to transport supplies, other carts, dollies or similar apparatus may be used. It is not recommended that personal vehicles be used and mileage for travel on the property is not reimbursed.
- Mileage is only reimbursed for those round-trips totaling 10 miles or more at one time. Mileage reimbursement is reserved for special trips, not for regular trips to pick up supplies. Should the need arise for mileage reimbursement, complete the provided form and turn in monthly. Mileage is paid through accounts payable, not through payroll.

***On-call Emergencies:***

- The Maintenance Supervisor and Maintenance Assistant must be available to take emergency calls on a 7-day rotating basis. The staff person on-call will be equipped with a digital pager and is required to return pager calls within 10 minutes of the page.
- Maintenance staff must never respond to an emergency page while intoxicated or after consuming alcohol.

- On call emergencies are considered anything involving life-safety issues, floods, fires, earthquakes, other natural disasters or major destruction or threat to the physical property.
- Maintenance staff are never allowed to carry weapons.

***Safety:***

- All staff must strictly adhere to safety policies and procedures to prevent on the job injuries and maintain a safe work and living environment. Additional safety training is available through the Authority office. Arrangements can be made through your Regional Manager.

***Skill Requirements***

- Knowledge of the principles of management and supervision.
- Knowledge of HUD regulations regarding housing quality standards and other maintenance related standards.
- Knowledge of the Authority's policies and procedures.
- Knowledge of the physical layout of the site.
- Knowledge of building and grounds maintenance, including standard practices, methods, tools, materials, electrical, plumbing, HVAC, painting, carpentry, and grounds keeping.
- Knowledge of safety rules, including accident causation and prevention.
- Knowledge of occupational hazards and appropriate safety precautions.
- Ability to administer a comprehensive maintenance program for a public housing site.
- Ability to analyze information from inspections in order to determine the maintenance needs, and the quality of maintenance services provided.
- Ability to develop plans and procedures for efficient and timely completion of work.
- Ability to maintain records in an orderly fashion.
- Ability to communicate effectively orally and in writing.
- Ability to establish and maintain effective working relationships with supervisor, subordinates, co-workers, residents, contractors, and the general public.
- Ability to prepare recommendations and reports, as required.
- Ability to read, understand and work from sketches and blueprints.
- Ability to understand oral and written instructions.

***Qualifications for this Position***

- High school education or equivalent.
- Experience in multifamily maintenance and experience involving public contact preferred.
- Valid driver's license and current vehicle insurance.
- Use of personal automobile for local job-related travel and pick-up, or ability to drive pickup truck and van.
- Neat, clean and appropriate appearance.
- Maintenance personnel must provide tools needed to perform routine maintenance tasks.
- Some type of formal training or experience in the following areas: carpentry; light plumbing work; light electrical work; painting; refurbishing and Authority's "Maintenance Test".
- Willingness to pitch in and work in areas other than repairs and maintenance, i.e. janitorial, custodial, gardening, painting, etc.

- Physical aspects of the job may require heavy lifting, bending, kneeling, stooping, climbing, balancing, and carrying.

**NOTE:** This job description should not be interpreted as all-inclusive. It is intended to identify the major responsibilities and requirements of this job classification.

## HOUSEKEEPER/GROUNDSKEEPER

### Job Description

This job description is a basic outline and must be used in conjunction with the Authority's On-Site Procedures Manual.

### Scope and Purpose

To be responsible, under the direction of the Housing Manager and/or Maintenance Supervisor, for the overall maintenance and care of the grounds, parking areas and common area facilities so they stay clean and orderly at all times. Because of the importance of assuring the successful management of the maintenance staff, the housekeeper may be cross-trained to complete some duties of the groundskeeper and/or maintenance technician/assistant to provide support and cooperation in completing all work items. Above all else, the spirit of teamwork and cooperation with other team members will not only improve the job you do, but enhance the entire work experience.

### Duties and Responsibilities

#### ***General:***

- Maintain a professional image and attitude in keeping the objectives of the Authority and residents' welfare.
- Report to the Housing Manager and/or Maintenance Supervisor each morning to communicate daily needs of the property and receive daily assignments.
- Report any observed problems in units or on the property to the Housing Manager.
- Wear uniform shirt and identification as provided/directed by the Housing Manager and/or Regional Manager. Jeans or khaki pants may be worn that are in good condition and free of dirt, paint and holes. Work boots and/or tennis shoes may be worn; however, sandals are not allowed.

#### ***Physical Requirements:***

- Physical aspects of the job may require heavy lifting, bending, kneeling, stooping, climbing, balancing, and carrying.

#### ***Grounds:***

- Keep the grounds, garbage container areas, hallways, garages and/or parking lots, in a neat and orderly manner not allowing any trash or debris to accumulate. Every morning and continually throughout the day these areas must be policed. Depending on the property, it may be required to vacuum and/or blow hallways, parking areas and/or breezeways two or three times a week or as necessary.
- Assist or perform all work associated with the upkeep of the grounds at the direction of the Housing Manager and/or Maintenance Supervisor.

***Curb Appeal:***

- Assist management/leasing staff with curb appeal which may include detailing model units, putting out balloons, banners, a-boards, etc.

***Building & Common Area Maintenance:***

- Daily cleaning of all common areas including but not limited to the community room, fitness area, elevators, elevator lobbies, laundry centers, hallways and model unit as designated by the Housing Manager.
- Sweep all assigned areas, stairways, halls, laundry centers, building entrances and common areas.
- Wet mop and vacuum all public areas stairways, hallways, laundry centers, building entrances and common areas. Always post 'Slippery When Wet' signs.
- Empty garbage containers in all common areas.
- Dust all furniture and fixtures in the common areas.
- Report all unusual circumstances such as vandalism, missing light bulbs or fixtures, missing smoke detectors or extinguishers in the common areas to the Maintenance Supervisor.
- Report supply needs to the Maintenance Supervisor.

***Parking Areas:***

- Parking areas are to be maintained in a clean and safe manner. Speed bumps, fire lanes and parking stalls should always be crisply painted. Any potholes should be reported immediately to the Maintenance Supervisor.

***Inventory, Equipment & Supplies:***

- Keep an inventory of all supplies and equipment belonging to the property. Maintain property-owned materials and equipment in a neat and orderly manner at all times. Maintain a neat and organized work area free of clutter and debris. Upon completion of cleaning tasks, all equipment and excess supplies shall be cleaned up and stored appropriately.
- Supply needs should be reported to the Maintenance Supervisor.

***Vendors:***

- The Authority takes great pride in the relationship developed with many vendors. Each staff member is expected to treat vendors with respect, fairness and honesty. The Authority does not allow 'kick-backs' or gifts from vendors.

***Vehicle use/Mileage/Supply transport:***

- A few properties have either a maintenance vehicle or maintenance golf-cart. These vehicles are to be driven only by licensed drivers with a clean driving record. These vehicles are to be used on the property only for the transport of supplies. Residents are not allowed in or on the vehicles at any time. The vehicles are to be maintained in a neat and orderly manner at all times. Abuse of vehicles may cause the elimination of the vehicle and/or revocation of driving privileges.

- For those properties that do not have a vehicle provided to transport supplies, other carts, dollies or similar apparatus may be used in lieu. It is not recommended that personal vehicles be used and mileage for travel on the property is not reimbursed.
- Mileage is only reimbursed for those round-trips totaling 10 miles or more at one time. Mileage reimbursement is reserved for special trips, not for regular trips to the bank or to pick up supplies. Should the need arise for mileage reimbursement, complete the provided form and turn in monthly. Mileage is paid through accounts payable, not through payroll.

***Safety:***

- All staff must strictly adhere to safety policies and procedures to prevent on the job injuries and maintain a safe work and living environment. Additional safety training is available through the central office. Arrangements can be made through your Regional Manager.

### **Qualifications for this Position**

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- High school education or equivalent (exceptions may be made).
- Full-time housekeeper/custodial experience, or gardening/grounds keeping experience, experience in related field or willingness to learn.
- Personable and trustworthy.
- Ability to work with and understand the problems of residents.
- Concern for work-safety program.
- Physical aspects of the job may require heavy lifting, bending, kneeling, stooping, climbing, balancing, and carrying.

**List of Exhibits for Chapter 17**

Exhibit 17.1 – Cash Sheets

Exhibit 17.2 – Notice of Returned Check

**Exhibit 17.1 Cash Sheet**

Property: Allied Gardens

Fax or e-mail to Accountant immediately after banking.

Month: January 2003

**\$143,500.00**

**Budgeted Monthly Revenue**

**52%**

**% of Budgeted Cash Received**

*Monthly Totals*

*\$74,713.00*

*\$565.00*

*\$74,148.00*

	Batch #	Date	Amount of Deposit	Returned Check	Accumulated Total	E-mail Date	Notes
1	1230001	12/31/02	\$1,500.00		\$1,500.00	12/31/02	
2	0102001	1/2/03	\$14,568.00		\$16,068.00	1/2/03	
3	0102NSF	1/2/03		\$565.00	\$15,503.00	1/2/03	
4	0103001	1/3/03	\$22,395.00		\$37,003.00	1/3/03	
5	0103ADJ1	1/3/03	-\$895.00		\$37,898.00	1/3/03	ADJ-Misapplication
6	0103ADJ2	1/3/03	\$895.00		\$74,148.00	1/3/03	ADJ-Misapplication
7	0103002	1/3/03	\$36,250.00		\$74,148.00	1/3/03	
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Per Batch Computation = Amount of Deposit *minus* Returned Check Amount *equals* Total

Accumulated Computation = Prior Accumulated Total *plus* Amount of Deposit *minus* Returned Check *equals* Current Accumulated Total

**Exhibit 17.2 Notice of Returned Check**

Date: 07/13/2004

To: Melissa Jones and Gene Smith

Apt. # 234

Your check, No. 5689 in the amount of \$ 850.00 has been returned to us by the bank.

Please promptly remit the following:

Amount of original payment by check:	<u>\$850.00</u>
Returned check charge	<u>\$40.00</u>
Automatic late fee	<u>\$40.00</u>
Current daily late fee	<u>\$35.00</u>

\$5.00 will be assessed daily until payment is made in full.

<b>Total Due as of <u>7/13/04</u></b>	<b><u>\$965.00</u></b>
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The total due must be paid immediately in the form of a cashier's check or money order **ONLY**.

Thank you for your prompt attention to this matter.

*Martha Manager*

Housing Manager  
Forest Hill Woods Apartments