

Norris & Stevens

INVESTMENT REAL ESTATE SERVICES

Training & Systems Operation Manual

For

On Site Apartment Manager

Multi-Family Property Management Division

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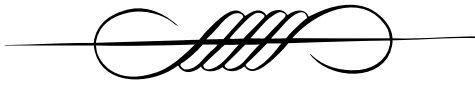
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Norris & Stevens

INVESTMENT REAL ESTATE SERVICES

MULTIFAMILY DIVISION MISSION STATEMENT

“TO  **CREATE**
MAXIMUM **VALUE** through
straightforward excellence in *multi-family*
property management, sales, and consulting.
Working as a team, to fulfill the goals of our
stakeholders in an efficient, growth-oriented,
socially responsible, and continually
improving organization.”

THE PURPOSE of this manual is to provide working information for frequent, and not so frequent, situations that may occur while you perform responsibilities as an On-Site Manager, Assistant Manager, Leasing Agent, or as Maintenance Personnel.

This manual is designed to walk you through the process of dwelling operations. It will outline company policies and practices, and more routine management concerns - how to record rent payments, the best screening practices for future residents, how to handle uncomfortable situations, when we need to evict and how it will be carried out, and why continuing education is necessary to be on the cutting edge.

If you encounter a situation that is not covered in this manual - *Call or email Your Asset Manager*. More likely than not, it would be a situation that they must guide you through or handle themselves.

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OPEN DOOR POLICY is maintained at Norris & Stevens, Inc. This means someone is always available to assist you. The contact list is regularly updated and emailed to you will furnish you with the names and extensions of the people in each department serving the Multi-Family Division.

- Maintain an open door policy at the community for all on-site personnel and residents; strive for fairness through open, honest communications.

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CONTACT LIST is emailed to you and located in Docs Box under Training Library > Training Documents > Multi-Family Contacts

- Print a copy for a handy reference.
- Retain in the "Building Notebook" replacing any previous lists.

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THE PROPERTY OWNER has invested his dollars in one or more residential properties. His responsibility does not stop with the outlay of funds; he must decide who will manage the property and what duties they will perform. Some owners are more "hands on" than others. Many leave the majority of the management decisions to the property management company as their agent, however, some duties the owner will always be responsible for include:

- Determining the goals for the community.
- Working with the Chairman and Executive Vice-President, Multi-Family Management Division of the management company to communicate those goals through the chain of command.
- Determining the amount of money that will be reinvested into the property, or paid to the ownership.
- Obtaining appropriate insurance coverage.
- Being responsible for seeking legal advice on behalf of the ownership, when necessary.

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CHAIRMAN is responsible for making all final decisions on behalf of the owner.

- Communicates regularly with owners.
- Develops strategies to achieve the owner's goals.
- Sets policies for the Multi-Family Division to assist in achieving the owner's goals.

EXECUTIVE VICE-PRESIDENT, MULTI-FAMILY MANAGEMENT DIVISION reports directly to the Chairman and is responsible for:

- Communicating regularly with owners.
- Implementing strategies and policies designed to achieve owner's goals.
- Handling or assisting with legal, fair housing, property tax, insurance and construction issues.
- Supervising the Administrative Assistant and Asset Managers.

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ASSET MANAGER is responsible for managing the community to ensure accomplishments of the owner's goals and objectives. He/she supervises the on-site staff and reports directly to the Executive Vice-President. The Asset Manager's responsibilities include:

- Taking all measures to ensure that the community is maintained in a spotless condition presenting the best curb appeal possible.
- Ensuring that the community operates in an efficient, cost-effective manner.
- Achieving a satisfactory cash flow by ensuring that:
 - ▶ The dwellings are rented and occupied rent is collected.
 - ▶ Rent increases are implemented as appropriate.
 - ▶ Expenses are controlled and in line with the budget.
- Approving payment of invoices.
- Preparing the annual operating budget for each community.
- Reviewing and analyzing monthly financial statement including income and expense.
- Recommending and implementing marketing programs, rental rates, maintenance programs, and other new ideas.
- Making periodic scheduled and unscheduled inspections of the community to ensure that maintenance and rental standards are upheld.
- Negotiating service contracts for the community.
- Hiring, training, supervising, evaluating, and motivating on-site personnel.

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ON-SITE PERSONNEL are responsible for the operation and maintenance of the community which is not a simple task because of the complexity of building codes, laws, and insurance:

- Responsible for dealing with the public on a daily basis and solving people-oriented problems.
- It is necessary to maintain a genuine concern for the future resident, vendor, or resident when dealing with them in a professional manner that is fair and as expedient as possible.
- Agree to rent and operate the community in a manner that is non-discriminatory according to the federal and state fair housing laws, and other local ordinances.
- Conducting all other duties as detailed in the employment agreement and elsewhere in this manual.

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FAIR HOUSING LAWS are to be followed at all Norris & Stevens, Inc. managed properties. Although only the federal and state laws affect all properties, the management policy is to follow all local fair housing ordinances as if they affect all properties.

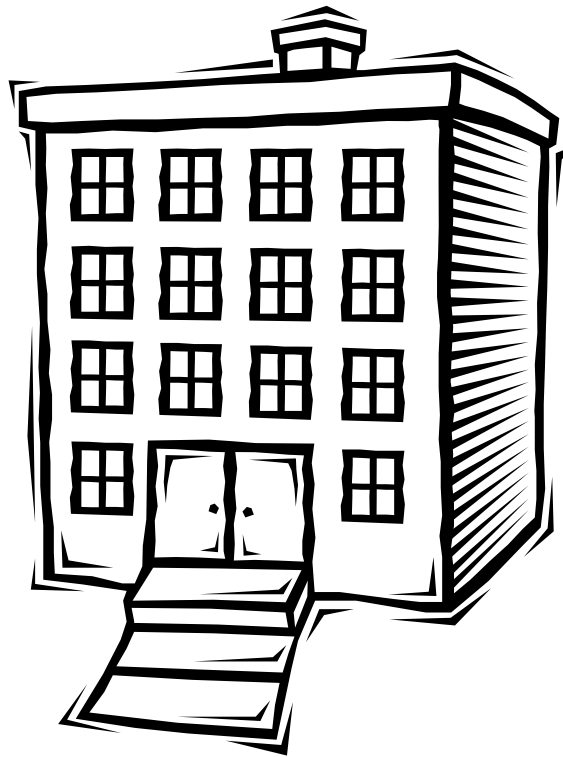
Violations to any fair housing law are punishable by federal and state law. Any person found to be knowingly and willfully using illegal discrimination practices will be terminated from their management position, and will not, under any circumstances, be eligible for re-hire at a Norris & Stevens, Inc. managed property.

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SUCCESSFUL COMMUNITY is not achieved without excellent on-site personnel, properly trained in the use of up-to-date and efficient procedures. Your goal, with the help of this manual, is to follow prescribed management policies and procedures to attain a successful community. You will know you have succeeded when:

- The community grounds and buildings are well maintained; *everything looks immaculate at all times.*
- Residents receive consistently high-quality service.
- Service is recognized as the true foundation of the business.
- Residents are treated like "customers", *and* customers are "kings"; resident interruptions are not viewed as an interruption to business.
- On-site personnel understands their responsibilities and provides necessary feedback.
- On-Site Managers are accessible to their staff and residents.
- Occupancy is 95% or better.
- Delinquent rent, skips, or dwelling damages are held to a minimum.

HAPPY DWELLING MANAGING!!



ON-SITE MANAGER is the "un-elected mayor" of the community. He/she determines the profile of the community and how effectively the policies and procedures of the management firm are carried out. All On-Site Managers:

- Often live within the community for which they are responsible.
- Report to the Asset Manager of the community.
- Supervise Assistant Manager, Leasing Agent, and Maintenance Supervisor; is responsible for all other on-site personnel.
- Are trusted to do their work and submit time sheets and/or earnings requests in the On-Site Manager's name.

Duties

- Responsible for the day-to-day operation (condition and performance) of the community.
- Must work to meet the owner's goals and objectives for the community which means the community operates in a cost-efficient manner while providing satisfactory housing to its residents.
- Must work to maintain or improve the standards set for the community.
- Under guidance of the Asset Manager, hire and train all on-site personnel under the On-Site Manager's supervision.
- Account for all monies collected on-site relating to the community.
- Learn and follow the standard operating procedures prescribed by Norris & Stevens Inc. including:
 - ▶ Renting Dwellings.
 - ▶ Resident selection and processing.
 - ▶ Processing all applicable forms.
 - ▶ Timely submission of all required reports.
 - ▶ Rent collection.
 - ▶ Coordinating maintenance activities, including housekeeping and ground care.
 - ▶ Conduct dwelling inspections.
 - ▶ Processing maintenance requests.
 - ▶ Purchasing.
 - ▶ Record-keeping.
 - ▶ Resident relations.

Required Skills

Management

- Plan
- Organize workloads
- Make decisions
- Delegate to others
- Motivate others
- Meet deadlines
- Recognize the community's requirements
- Identify financial, action, and staffing priorities
- Set and accomplish goals

Administrative

- Master paperwork and detail with good organizational skills.
- Hire, train, motivate, direct, and evaluate staff.
- Supervise and work well with on-site management personnel.
- Know where and when to call for assistance.



Interpersonal

- Be able to relate to and work well with people; communicate clearly, discussing reasons for the instructions (people respond best when they understand why instructions are given).
- Capable of thinking in terms of the other person's interests; focus is placed on ensuring the resident finds living in the community a positive experience.
- Ability to listen well and understand what residents and staff want; walk the property, listen, and observe.
- Capable of managing and motivating staff; providing a morale boost when needed.
- Confident and firm in enforcing the community's rules and regulations.
- Demonstrate integrity, respect and responsibility in dealing with residents and staff.
- Must maintain a positive image with everyone, especially with a resident who is moving out.

Personal

- Inner control that includes having high expectations for the level of their own performance and for the other members of the on-site management team.
- Math, verbal and reading skills.
- Be genuinely interested in people and have the desire to interact with them.
- The ability to take control of difficult situations, yet follow all community and Norris & Stevens, Inc. policies.

WHAT MAKES A GOOD ON-SITE MANAGER?

Positive Mental Attitude



Loyal - Dependable - Trustworthy



Discipline



Sound Dwelling Policies



Profit - Minded



Stays on Top of Problems - Not Under Them



Value and Service Minded for Residents



Good Record Keeper



Able to Win Friends and Influence People Properly



Thoroughly Informed of Dwelling Business

ASSISTANT MANAGER

- Hired, trained, supervised, evaluated, and terminated by the On-Site Manager with the Asset Manager's input.
- Reports to the On-Site Manager.
- Works 2- to 5-days per week depending upon size of property and job assignments.
- Does not have the authority On-Site Manager has, usually less.
- Does not usually participate in rent increase bonus, if any; but may participate in re-rent bonuses.
- Assistant Managers are encouraged to attend training courses.

Duties

- Performs most of the same duties as the On-Site Manager but not with the same degree of expertise; may or may not include daily, weekly, monthly reports.
- Shares nighttime telephone duties.
- Acts in the On-Site Manager's absence.

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LEASING AGENT

- Reports to the On-Site Manager.
- Hours may vary from part-time to full-time depending upon size of property and job assignments.
- Authority includes the execution of rental agreements (leases) within the limits set by policy and with the authority of the On-Site Manager, and initiates maintenance requests for the preparation of dwellings; in most cases, has no authority to make expenditures or to sign purchase orders.
- Does not usually participate in rent increase bonuses, if any; but may participate in re-rent bonuses or other bonuses specifically related to leasing.
- Are encouraged to attend training courses.

Duties Renting and leasing dwellings:

- Greets prospects and show dwellings.
- Processes applications.
- Inspects dwellings on rent-ready list to ensure they meet prescribed standards.
- Initiates and maintains marketing programs.
- Handles pre-move-in duties - inspects the dwelling, calls the utility company, prepares the paperwork.
- Conduct the move-in with new resident - performs a move-in inspection, collects the monies due, issues the keys, explains the rules and regulations, signs the rental agreement (or lease).

- May be required to perform management duties as determined by the On-Site Manager.
- Shares nighttime telephone duties.

CHAIN OF COMMAND must be respected by all employees.

- Should be maintained to maximize organizational and communications efficiently.
- Unless absolutely necessary, on-site personnel are to report directly to their supervisor; personnel can bypass the level in the chain if they believe that the matter deserves special attention, such as harassing an employee.

Shortcuts often cause confusion and hurt morale; the chain of command should not be broken by:

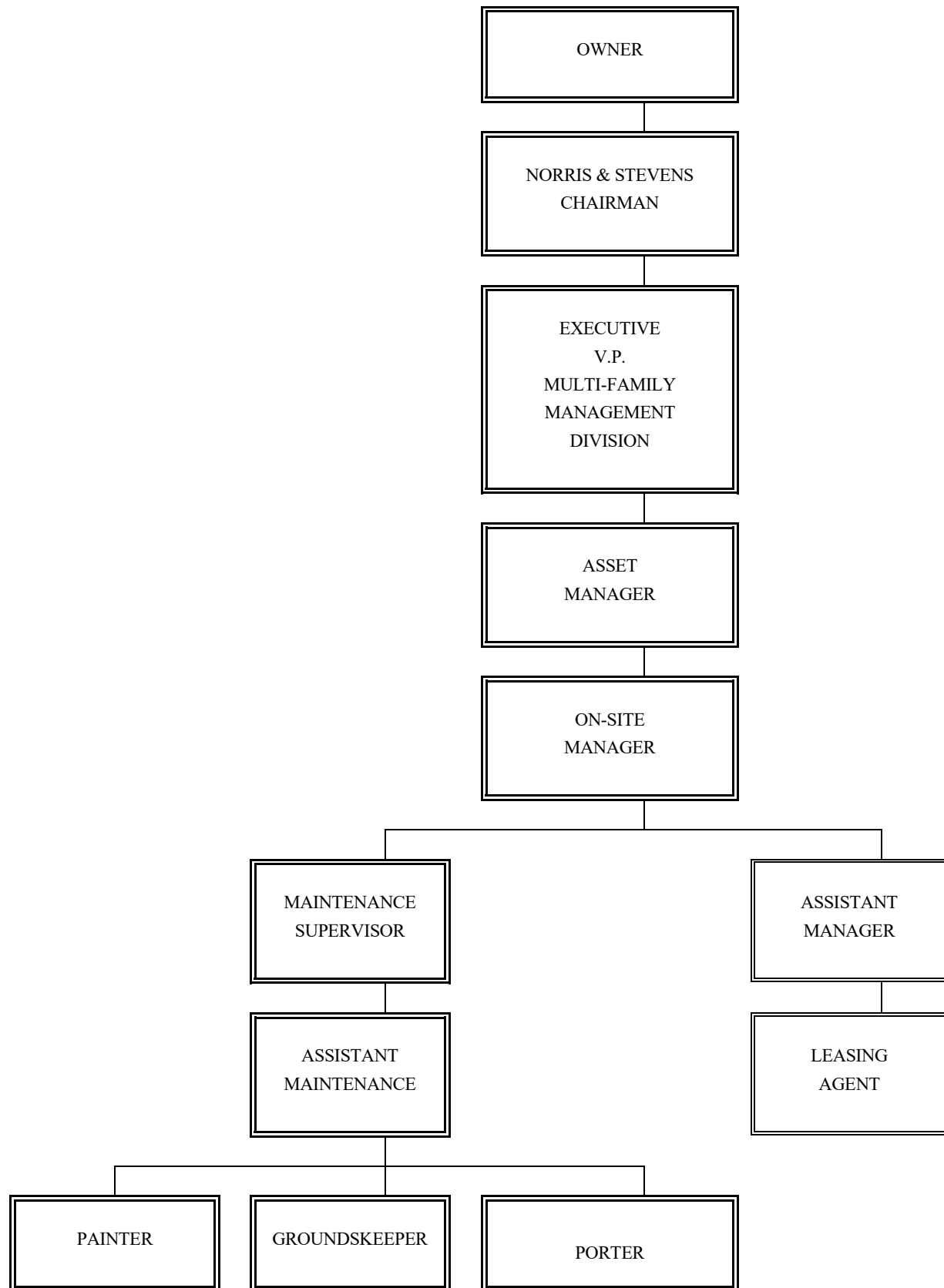
- Owners and Asset Managers bypassing On-Site Managers and dealing directly with residents without the On-Site Manager's knowledge and full involvement or presence.
- Asset Managers bypassing On-Site Managers and dealing directly with on-site personnel.
- Owners bypassing Asset Managers and dealing directly with On-Site Managers.
- On-site personnel bypassing the On-Site Manager and trying to deal directly with the Asset Manager.

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**SUCCESS CAN BE ACHIEVED BY
DEVELOPING THE FOLLOWING QUALITIES**

- ▶ **APPEARANCE** - *Neatness and professional attire.*
- ▶ **HONESTY** - *Being open and direct with residents and co-workers is a must. Impossible promises will cause you trouble.*
- ▶ **ENTHUSIASM** - *You must be sold on what you have to offer prospects. Without genuine enthusiasm you fail.*
- ▶ **KNOWLEDGE** - *Know your dwellings; many times you must assist some expert or service representative. You should know both the inside and outside of your project thoroughly. Know your residents.*
- ▶ **PATIENCE** - *Patience is a developed art. Patience will get good results. Patience is an important ingredient to a good manager's personality.*
- ▶ **FRIENDLINESS** - *A pleasing personality:*
 - ▼ *Gets good results;*
 - ▼ *Helps in renting dwellings;*
 - ▼ *Is a must when dealing with the many problems that arise dealing with people;*
 - ▼ *Will surely help you be successful.*

Organizational Chart



WORK SCHEDULES



Daily

- Visit every vacancy - lightly dust and clean, flush the toilets, and run water from all of the faucets to avoid an embarrassing brown water build-up; be sure that the heat is either turned very low (if freezing is imminent) or turned off; check the circuit breaker panel box to see if the water heater is turned off.
- All parking lots, garbage areas, common areas, lawns and flower beds should be patrolled for litter, cigarette butts and garbage. Note any vandalism, graffiti or repairs, or landscaping that needs attention.
- The swimming pools and club rooms should be cleaned and picked up.
- All laundry rooms and common areas should be checked and cleaned up.
- All exterior lights are to be checked and replaced as necessary; make sure lights come on when it is dark and turn off when it is daylight.
- The office area should always be neat, clean and ready for business; sweep entrance, maintain planted flowers.
- Rents need to be deposited daily with the exception of when the accountants remove access to Skyline near the 25th to “close” the books for each month.

* * *



Weekly

- On Friday morning, make a list of all activities needing attention for the week, and add to it as new projects come up.
- All flowerbeds should be weeded so that the weeds cannot get out of hand.
- All lawns must be mowed during the growing season.
- Sweep parking lots, walkways, and around garbage enclosures; hose off areas if necessary.
- Walk around all common areas of the community indoors and outdoors. Note any problems and things needing attention. The minor problems should be taken care of immediately and logged in. The major ones should be reported to your Asset Manager and further action taken.
- All Occupancy and Make Ready reports should be completed Sunday night and emailed to your Asset Manager at Norris & Stevens, Inc.
- Purchase Orders should be organized and emailed weekly to your accountant at Norris & Stevens, Inc.

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Monthly

- All curbs and parking areas should be swept or hosed.
- All entryways and common areas should be cleaned and all spider webs removed.
- All signs and lights should be cleaned off and any surrounding shrubs should be cut back if necessary.
- Review all repair lists, delete work done, add new work needing attention, and update each.
- Have all rents collected by the 15th of each month.
- Prepare and email in earnings requests and petty cash requests along with timesheets by the 2nd Friday to Payroll@Norris-Stevens.com.
- Send Lease Renewal letters 105 (but not less than 94) days before the end of each resident's lease.
- Check the Delinquency Report in Skyline to issue notices to any residents still owing money by the 15th of the month.
- You should schedule a number of dwellings to go through each month to check for maintenance needed and for just a general walk-through so that each year you have gone through each dwelling at least twice.
- Check handrails on stairways.
- Check fire alarm systems.

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Winter Work Schedule

- Distribute winterization letter to residents.
- Winterize swimming pool.
- Check roofs.
- Clean gutters and down spouts.
- Prune trees and shrubs.
- Clean-up landscape.
- Clean storm drains.
- Wrap outdoor faucets; shut off water.
- Install vent plugs.
- Check weatherstripping on doors.
- Caulk windows where needed.
- Plant spring bulbs.
- Reseed sparse lawn areas.
- Check dumpsters for paint and repair; report to garbage hauler.
- Order urea fertilizer or sand to be used during icy periods.
- Check laundry room doors to be sure they close properly.
- Continue mowing until first frost.
- Store all lawn equipment - hoses, etc.; have mowers tuned and blades sharpened for the next season.
- Distribute Christmas Tree letter to residents.
- Oversee the disposal of Christmas Trees.
- Remove ice and snow as needed.



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Spring/Summer Work Schedule

- Distribute Recycling Letter.
- Unwrap faucets.
- Remove vent covers.
- Repair gutters and down spouts.
- Inspect irrigation system; start watering.
- Make pool/spa ready.
- Landscape cleanup including weeding.
- Spread weed pre-emergent (Casoron®).
- Plant annual flowers.
- Spread bark mulch.
- Fertilize lawns and shrubs.
- Inspect building for trim or entire painting touch-up.
- Check dumpsters for paint and repair; contact garbage hauler.
- Check for needed screens.
- Inspect site signs.



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ON-SITE PERSONNEL EMPLOYMENT AGREEMENT

- Refer to your employment agreement and your Asset Manager for any information.

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Petty Cash shall be determined by Asset Manager.

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Hours of Work will vary from community to community depending upon size, job duties, and number of on-site employees.

- Preauthorization must be received from the Asset Manager before working more than the specified hours.
- A Purchase Order number must be obtained from the Asset Manager and included on the Earnings Request.

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Office hours will vary and generally are not to be posted. On-Site Managers are expected to be available to cover the rental center during the weekend. Specific or varied days off must be agreed upon by the Asset Manager. Assistant Manager is expected to work during the On-Site Manager's days off. Maintenance and cleaning personnel hours may be guaranteed or variable.

Since weekends are the busiest rental times, the best person(s) for the job must be on duty. Residents expect, and deserve, to have the On-Site Manager available during working hours to answer their questions and respond to their needs. Norris & Stevens, Inc. is closed on the weekends. If a problem were to arise and both the On-Site Manager and the Asset Manager were unavailable, then the problem can quickly escalate to crisis proportions.

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Work Schedule will vary based upon the condition and size of the community, and the number of residents. Standard work hours are between 8:30 a.m. and 5:30 p.m. However, the normal operation of the community may require later office hours to accommodate the working residents during rent collection. Hours may also vary when several dwellings are ready to turnover at once. The On-Site Manager must use time management to prioritize the work load. Seek guidance from your Asset Manager when routine work cannot be performed within the number of hours allowed, or unusual or one-time situations require extra hours to be worked.

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Cleaning and Painting may be paid to on-site personnel at the contract rates if stated. These rates are based upon the number of bedrooms, the bedroom size, the overall dwelling size, flat or townhouse style, stairs, high ceilings, or any other unusual characteristic.

- Tools and supplies are to be furnished by the employee.

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Vacations are to be taken with PTO (Personal Time Off). PTO is assessed by the number of hours worked multiplied by .0385.

PTO can be used for sick time beginning three (3) months of employment. Planned time off for vacations are to approved by your Asset Manager.

- A Vacation Request must be completed and approved prior to any vacation being taken.
- The On-Site Managers are required to secure coverage in their absence.

Employees can only rollover one week of PTO once they reach their anniversary date.

PTO is not paid out upon termination.



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SAFETY RECOMMENDATIONS

- Have a basic first aid kit in the rental center.
 - Never draw a sharp object toward yourself.
 - Use the principles of safe lifting and carrying when moving heavy objects.
 - When performing a hazardous task, be sure to block off the area; example, when climbing a ladder over a sidewalk.
- 
- Always have another person "spot" or stabilize when using a ladder. Standard Height is a 6-8 foot A-Frame. It is a Norris & Stevens policy that outside contractors be used if it is required for anything higher.
 - Clearly mark a wet floor you are scrubbing so that a person will not slip on it.
 - Do not clutter or obstruct passage areas.
 - Always read the instructions before using a piece of equipment or a product.
 - Know as much as you can about a tool before attempting to use it.
- 
- Wear goggles or protective eye covers when operating power equipment.
 - When operating noisy equipment, use ear protectors.
 - Do not take safety devices off tools.
 - Never operate an electric tool near water unless it is specifically approved for such use.
 - Do not use lawn mowers or power equipment around persons where they could be struck by a flying object.
 - When vacuuming a hallway, use a brightly colored extension cord and frequently check to be sure it is lying flat on the floor and is not a hazard.
 - Never leave tools or supplies on a job if others are able to get to them; do not leave a piece of power equipment with the engine running.
 - Know where the MSDS Handbook is located or kept.

- Wear rubber gloves when using dangerous chemicals.
- Wash your hands after handling chemicals.
- Use protective masks specified for certain chemicals.
- Do not experiment with dangerous chemicals or equipment.
- Never mix two chemicals unless this has been approved on the label; for example, chlorine and ammonia form a deadly gas.
- Be alert to ventilation requirements.
- Keep chemicals in tightly sealed child-proof containers away from children.



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Injuries to Employees

All on-site personnel are covered under workers' compensation insurance. If injured on the job:

- Seek appropriate medical attention at once.
- Report all injuries promptly to your Asset Manager and the payroll specialist.
- Fill out a Norris & Steven's Incident Report after obtaining from Docs Box, then contact your Asset Manager and Payroll.
- Be prepared to participate in an interview with your Asset Manager at the main Norris & Steven's office as soon as practicable following injury or incident.
- Be prepared to submit to a drug screening examination.
- Be aware that fraudulent workers' compensation claims will be dealt with severely and may result in criminal and/or civil legal action.



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Injuries to Non-Employees can result from something on-site personnel is doing.

- Assist the person to get appropriate medical attention.
- Do not move an injured person unless you have permission from a medical advisor or unless further danger would result in leaving them there.
- Be very careful in what you say to anyone, even authorities; do not give statements to newspapers, witnesses or bystanders.
- Report the problem to your Asset Manager promptly.
- Fill out a Property Incident Report.
- The property carries insurance which covers normal liability problems; it excludes intentional wrong doing and gross negligence.

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COMMUNICATIONS AND PROCEDURES**Norris & Stevens, Inc.**

- Appointments are preferred when you need to speak with any office staff member in person. Use the Multi-Family Contact List to call the person you need directly.
- Calls to any office staff member can be made between 8 a.m. and 5p.m Monday through Friday.
- Your Asset Manager is frequently out of the office for extended periods of time. The best time to reach them is Monday, Wednesday, Thursday, or Friday is between 9 a.m. and 12 p.m.; Tuesday mornings are reserved for the Multi-Family Management Division meeting.
- If you have an emergency and your Asset Manager is not in, ask the receptionist to connect you with any appropriate person to help you.
- All employees who visit the Norris & Stevens, Inc. office are expected to conduct themselves in a professional, quiet manner; any children accompanying employees are also expected to conduct themselves appropriately since the Norris & Stevens, Inc. office is a place of business where many owners, potential clients, and other officials visit; on-site personnel may dress casually when visiting the office, but dress should be clean and of the type one would wear while showing dwellings.

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Owners

- Norris & Stevens, Inc. is employed as the managing agent of each community.
- On-site personnel are expected to advise the Asset Manager when an owner has communicated with them; the On-Site Manager is expected to be truthful in any communication that is requested by the owner.
- Direct owner communication is discouraged in as much as confusion, incorrect, improper, or unlawful decisions and actions may result.

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Residents

- The On-Site Managers are encouraged to have verbal or written communications with the resident to effectively conduct the dwelling management.
- Threats and warnings should be used carefully as they may create a liability problem for Norris & Stevens, Inc. and the owner; if there is any doubt about the type of communication that would be appropriate to use in a given situation, consult your Asset Manager; you should never threaten an action you cannot legally follow through on.
- Copies of written communications to residents should be approved by your Asset Manager; a copy should be provided to your Asset Manager and kept in the resident's file. *Therefore, do not email or text residents for communicating.*
- If a situation arises in which there may be sensitive communication because of potential alleged discrimination, it is advisable to contact your Asset Manager.
- All termination notices will come from Norris & Stevens Inc., the 72-hour notice, and unauthorized occupant notice is permitted to be issued on-site; other notices may, from time to time, be written on-site with the Asset Manager's permission.
- Newsletters that are brief and in good taste are encouraged; they should be approved by your Asset Manager in advance.

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**Body Language**

- Facial expressions should be calm, concerned, sincere and interested.
- Body posture will show you are attentive and interested if you stand up while addressing the resident.
- Movements should be slow so that you don't appear to be rushing the resident.
- Don't smoke, eat, or chew gum while talking to the resident.
- Tone of voice reflects your attitude, make sure it says "*I'm here to help you the best I can*"; remember people respond to *how* you say something more than what you say.
- Sighing is a sign of annoyance or impatience and should be avoided in front of a resident.

* * *

POLICIES

Appearance is of utmost importance when marketing your community. A business-like image is expected to be maintained at all times. On-Site Manager(s) must be neatly dressed, clean and at all times ready to meet the public. Work clothes should only be worn when performing maintenance duties. Employees must be dressed in a business-like manner when showing and renting the dwellings and meeting the public.

- Hair must be clean, brushed or combed and well kept.
- Moderately and appropriately applied makeup; facial hair must be neatly trimmed; breath is to be fresh.
- Clothing must be pressed, neat, clean and in good repair; shorts, halter tops, wrinkles or dirt are not acceptable.
- Hands and nails are to be clean (no chipped polish).
- Stockings must be run free; shoes must be polished.

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Smoking for those that smoke, you may be unaware how much smoke odors cling to clothing and paperwork. Although we cannot control your vices in your own home, we require our On-Site Managers to put their best appearance forward which extends to odors.

- Smoking is *not permitted* anywhere on the property.

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Confidentiality

- All pay information is to be treated as confidential and should not be discussed with other personnel of Norris & Stevens, Inc. managed properties.

CONFIDENTIAL

- All information relating to rent levels, vacancies, expenses, ownership, etc. will be kept strictly confidential and will be discussed with outsiders only with your Asset Manager's permission; example, to an insurance claims adjuster or to an appraiser hired by the owner.

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On-Site Manager/Resident Socializing

- Although Norris & Stevens, Inc. cannot choose your friends for you, we strongly urge you not to become friends with your residents; resident control becomes almost impossible when friendships are involved.

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15 LEADING TIME WASTERS

- ▶ Telephone interruptions.
- ▶ Visitors dropping in without appointments.
- ▶ Meetings, both scheduled and unscheduled.
- ▶ Crisis situations for which no plans were possible.
- ▶ Lack of objectives, priorities and deadlines.
- ▶ Cluttered desk and personal disorganization.
- ▶ Involvement in routine and detail that should be delegated.
- ▶ Attempting too much at once and underestimating.
- ▶ Failure to set up clear lines of responsibility and authority.
- ▶ Inadequate, inaccurate or delayed information.
- ▶ Indecision and procrastination.
- ▶ Lack of or unclear communication and instruction.
- ▶ Inability to say "NO".
- ▶ Lack of standards and progress reports to keep track of things.
- ▶ Fatigue.

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THE EMPLOYER: All questions referring to The Employer, Employment Agreement and Compensation are to be referred back to your employment agreement and your Asset Manager.

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PAY PERIOD is the calendar month.

- Extra pay for cleaning, painting and special work, is highly unusual and must be pre-authorized by the Asset Manager. You must get a Purchase Order from the Asset Manager approving the additional work. Mark it on timesheets and on the Maintenance Earnings Request to be submitted every 2nd Friday of the month.
- All employees must submit the Earnings Request no later than the 2nd Friday of the month for the previous month.
- Employees starting mid-month can request payment for the partial month. Contact the Payroll Specialist for assistance with your first payroll submission.
- The pay period requested on the earnings request may be adjusted by the Asset Manager or the Payroll Specialist, if necessary.

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Pay Date is the 7th of each month.

- Checks will be mailed no later than the 7th of each month from Utah.
- Checks not received within 5 mailing days should be reported to the Payroll Specialist after mail delivery on the 12th of the month.
- In lieu of a payroll check, automatic deposit, or a pay card is offered. Employee must sign up for either of these.

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Days Off must be at least two per week.

- On-Site Managers are not to take Saturdays and Sundays off.

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Weekly Time Sheets are to be completed by all on-site personnel.

- The time sheet was designed to remind you of the required tasks that must be completed on a daily basis; check only the items you have completed (larger properties, with larger staffs, may mark different boxes on different time sheets; but, between all employees *all* the boxes are marked showing all the items have been completed).
 - ▶ Visit every vacancy - lightly dust and clean; flush the toilets; run the water from all of the faucets to avoid an embarrassing brown water build-up; be sure that the heat is either turned very low (if freezing weather is imminent) or turned off; check the circuit breaker panel box to see if the water heater is turned off.
 - ▶ Clean the laundry, fitness, and clubrooms.
 - ▶ Clean the pool and/or spa.
 - ▶ Pick up the grounds and common areas.
 - ▶ Check all of the lights for proper operation - they should be on when it is dark, and off when it is daylight.
- Employees working at two or more communities are to complete one time sheet per community.

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WEEKLY TIME SHEETS

- Use this form to report the hours worked per employee per week.
- All work weeks start on Friday and end on Thursday.
- The employee should retain a copy for their personal records.
- Email a copy to Payroll@Norris-Stevens.com on the 2nd Friday of every month unless otherwise instructed.

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EARNINGS REQUEST is to be completed monthly by every on-site employee (this means a team completes two request forms). Email it to Payroll@Norris-Stevens.com the 2nd Friday of every month.

- The On-Site Manager must review and sign each employee's earnings request performing work at the community.
- By signing the earnings request, the On-Site Manager is verifying they have checked the accuracy of the form and is giving their authorization for payment to be made; the On-Site Manager is not to sign an earnings request that is not correct.

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EARNINGS REQUEST FORM

SECTION 1: Adjusted Base Pay

- Use this request to recap earnings for each employee per month.
- Enter your name, the name of the community, and the month and year of the request.

A) PERCENTAGE PAY:

- ▶ Your Payroll Specialist will compute this for you. Do not enter anything in this section unless otherwise directed.

B) SALARY BASE PAY:

- ▶ Enter the base pay from the employment agreement.
- ▶ Enter your portion of the base pay as indicated on the employee agreement, by the Payroll Specialist or by dividing the base rate by ½ for two people.

SECTION 2: Re-Rent Bonuses

- ▶ If your Employment Agreement allows for re-rent bonuses, fill in the spreadsheet for bonus pay.
 - Move-In Bonus: When a dwelling is re-rented at a higher rate, the difference in the amount is awarded as a one-time bonus 30 days after the move-in.
 - Rent-Raise Bonus: When rents are raised in the community, half of the amount of the raise is awarded as a one-time bonus 90 days after the rent raise.

SECTION 3: Total Earnings This Month

- ▶ Enter the total amount of the base pay plus any re-rent bonuses.

SECTION 4: Rent Credit

- ▶ Enter the amount of the dwelling allowance from the employment agreement.
- ▶ Enter the amount of rent credit that is your portion as indicated by the Employment Agreement, the Payroll Specialist or ½ of the rent credit for two people.

Sign the form prior to emailing to Payroll@Norris-Stevens.com.

REIMBURSEMENT REQUEST is requested at the same time as the Earnings Request on the 2nd Friday of every month. The purpose is to request reimbursement for expenses paid while performing on-site management duties.

- Typical reimbursements may include:
 - 1 ▶ Utility allowances
 - 2 ▶ Phone allowances
 - 3 ▶ Gasoline allowances
- Other reimbursements are sometimes authorized on an individual contract basis, approved by the Asset Manager.

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Utility Allowance is determined by the housing provided to the On-Site Manager, whether or not separate utility meters are used, and whether or not common area usage is measured by the On-Site Manager's meter.

- ▶ Utility allowance requested cannot exceed authorized amount.
- ▶ Copy of utility bill must be submitted.
- ▶ The amount of the utility allowance or the amount of the utility bill will be reimbursed, whichever is lower.

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Phone Allowance is determined by Asset Manager and is also stated on the employment agreement. This allowance is to reimburse On-Site Manager for forwarding the office phone to a cell phone when away from the rental office or for emergency calls after-hours.

- ▶ Phone allowance requested cannot exceed authorized amount.
- ▶ Copy of phone bill must be submitted.
- ▶ The amount of the phone allowance or the amount of the phone bill will be reimbursed, whichever is lower.

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Gasoline Allowance is determined by Asset Manager and is also stated on the employment agreement. This allowance is to reimburse On-Site Manager for travel related to the dwelling business, as in for maintenance supplies.

- ▶ Gasoline allowance requested cannot exceed authorized amount.
- ▶ Copies of one or more gas receipts must be submitted.
- ▶ The amount of the gasoline allowance or the total of the gas receipts will be reimbursed, whichever is lower.

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Miscellaneous Reimbursement is determined by Asset Manager, Vice-President, Multi-Family Management Division, and/or the owner. Miscellaneous reimbursements may or may not be stated on the employment agreement, and vary with each community/employee.

- ▶ Miscellaneous reimbursement must be supported by documentation attached or provided to the Asset Manager.
- ▶ Copies of bills or receipts must be submitted, if applicable.
- ▶ The amount of the miscellaneous reimbursement must be pre-authorized.

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REIMBURSEMENT REQUEST FORM

- Use this form to request reimbursement for allowances as provided in the employment agreement, and other items approved by the Asset Manager.
- The employee is to email The Reimbursement Request Form with Earnings Request on the 2nd Friday of every month to Payroll@Norris-Stevens.com and retain a copy for their records.

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PERSONAL TIME OFF (PTO) form is to be completed by both full-time and part-time employees. Except in cases of illness or injury, PTO must be scheduled in advance and is subject to approval by the Asset Manager. Part-time employees do not need to complete a vacation request if the time off does not interfere with the scheduled time to be worked. It will be the employee's responsibility to find a temporary replacement while away from the premises. PTO pay, if any, is established by employment agreement; additional time off may be approved without pay if authorized by the Asset Manager.

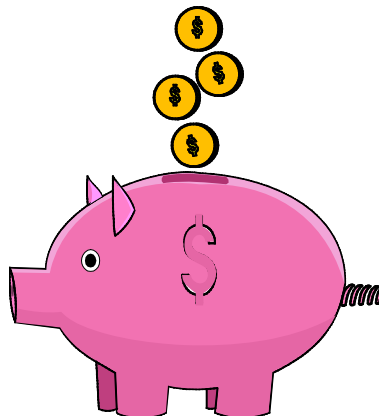
- The On-Site Manager must approve time off for the Assistant Managers and Maintenance Supervisor.

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PTO REQUEST

- Use this form to request vacation time. You can find a blank copy in Docs Box> Training> Documents> Payroll.
- Apply for PTO by emailing the PTO Request to the Asset Manager.

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ON THE JOB INJURY may occur while performing management duties even though the best precautions have been taken. Any injury must be reported immediately to On-Site Manager, Asset Manager, and to Payroll Specialist. To qualify for Worker's Compensation Insurance benefits, the employee must meet the requirements set by the Worker's Compensation Law.

- Remember, the employer is the owner of the community named on the employment agreement, or RMI, not Norris & Stevens, Inc.
- Report the incident immediately to On-Site Manager, Asset Manager, and the Payroll Specialist.
- Obtain "Report of Occupational Injury or Disease" from the N&S Payroll Specialist.
- Complete report form accurately under section marked "Worker".
- Give completed, signed form to Payroll Specialist for processing.
- Be prepared to take a urine test within 24 hours to screen for the possibility of drug use or abuse being a contributing factor to the injury or accident.

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RENTER'S INSURANCE also known as an HO4 policy, covers the resident's personal property in a dwelling or the dwelling the resident rents and occupies as a primary residence. It also provides loss of use, which is important when the resident cannot occupy the residence due to a fire or other loss that is covered by the policy. Residents should be encouraged to purchase renter's insurance (insurance is required if the resident has a waterbed, pet, or an aquarium over 20 gallons), but do not suggest any one carrier over any other.

- The owner's insurance policy only pays for repairs or replacement of the building if something were to happen to it; but will not cover the residents' possessions nor the resident's liability if they were found to have caused the damage.
- Residents who have insurance are less likely to sue their landlords after an incident than those that do not have insurance.

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RENTER'S INSURANCE: TYPICAL INCLUDED COVERAGE

• Fire or Flood. • Windstorm or hail. • Explosion. • Riot or civil commotion. • Aircraft. • Vehicles. • Smoke. • Vandalism. • Theft. • Falling objects. • Weight of ice, snow or sleet	• Sudden and accidental discharge of water or steam from a plumbing, heating or air-conditioning system, or domestic appliance. • Collapse of building. • Freezing of a plumbing, heating, air conditioning system or household appliance. • Sudden and accidental damage from artificially generated electrical current (does not include loss to tubes or transistors). • Covers improvements, alterations or additions you make to rented property.
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- **Insurance Coverage**

- It is strongly suggested that all residents acquire renter's insurance.
- May cover the resident's personal goods which are damaged or stolen on the premises.
- May cover losses to their goods when they are off the premises, such as golf clubs or a camera stolen out of their locked car.
- May provide coverage in case someone forges their checks, or steals their credit cards.
- May cover personal liability in case they are negligent and cause damage to the dwelling.
- May cover personal liability for non-auto bodily injury claims brought by others.
- May cover Loss of Use including additional living expenses. This coverage refers to the increased amount a resident has to pay to maintain his/her normal standard of living.
- May cover Personal Liability Coverage which covers the resident if he/she is sued for bodily injury or property damage to other's property. This policy will provide a defense and coverage, as long as the basis of the suit is covered by the policy. For instance, if a resident has a business in his/her dwelling, the policy would not provide any coverage for liability arising out of that business.

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ACCIDENTS AND PERSONAL INJURIES to residents, guests, and staff members are a serious matter no matter how insignificant they may seem at the time.

- The best policy is for the On-Site Manager to document carefully and say nothing until he/she has had a chance to discuss the incident with his/her Asset Manager, and if necessary, with the insurance adjuster.
- In the majority of cases, the matter will end with the treatment of the injury.
- In a small number of cases, the injury may result in a liability lawsuit against the property.
- In lawsuit cases, the documentation and lack of compromising statements will support a fair settlement of the case.

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ACCIDENT PROCEDURES

- ▶ Obtain (or see that the injured party obtains) competent medical care immediately to treat the injury and document the physical condition of the injured party.
- ▶ Do not admit guilt.
- ▶ Fill out an incident/accident report completely and include all of the facts about the injured party, the circumstances of the injury, and the names, addresses, and phone numbers of all witnesses to the accident.
- ▶ Where appropriate, take pictures of the accident scene and any automobiles or equipment involved in the accident.
- ▶ Direct any questions or inquiries to your Asset Manager.

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- **Calling for Help**

- The On-Site Manager should not hesitate calling the police or fire department (911) if a resident or guest is seriously injured.
- If a motor vehicle is involved, the police should always be called to file a report.
- Failure to call them at an appropriate time could result in a judgment against the community.

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- **Reporting**

- The On-Site Manager must report any incident no later than the next working day to the Asset Manager; the Asset Manager will report appropriately to the insurance carrier.
- The insurance carrier may refuse to cover an incident if the insurance company was not notified, especially in a case in which a person with minor injury refuses medical treatment and later at the insistence of a friend or family member, such a person may seek a jury trial.

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- **Serious Injuries and Criminal Assaults** should be treated with utmost care by the On-Site Manager; in most cases legal actions result from such incidents.
 - The On-Site Manager is to complete an incident/accident report.
 - Obtain full copies of the relevant police, fire, and coroner's report.
 - Notify the Asset Manager immediately; the insurance carrier should be notified by the Asset Manager as soon as practical after the incident or as soon as it is known to the On-Site Manager.

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PROPERTY DAMAGE can occur from natural causes, neglect, or an accident on the part of the residents and on-site employees.

- The On-Site Manager has two primary duties:
 1. Document carefully and fully all damages to the structure and contents including taking pictures of the entire damaged areas before cleanup begins.
 2. Secure the structure so that further damage is minimized and residents, guests, and employees are not endangered.

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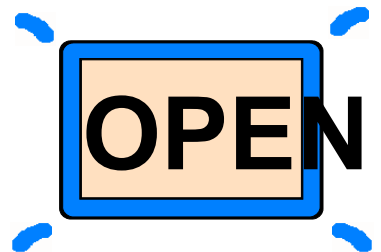
LOCATION of the rental center may be a separate office or within the On-Site Manager's dwelling. If the office is separate, its location has been chosen after considering the community traffic pattern, visibility and accessibility. Rental centers located within a dwelling should meet the same requirements, if possible.

- Place and maintain signs directing traffic to the rental center.
- Create sign(s) for rental center that will stand out from other signs and the surrounding landscaping; use large lettering and bright colors, if appropriate.
- Maintain appropriate parking facilities for applicants and future residents.

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OFFICE HOURS are not to be posted unless otherwise instructed by the Asset Manager. Business, however, is to be conducted as needed.

- Presumed hours are between 8 a.m. and 5 p.m. including weekends; the On-Site Manager must set the schedule necessary for the community.
- Use open/closed signs; will return signs are helpful for visitors to know when to find you available.
- Rental centers are to be open during the lunch hour of 12 noon to 1 p.m.; this is because many prospective residents have only their lunch hour to shop for a dwelling; lunch breaks for On-Site Managers should be before or after this time period.
- Breaks for the On-Site Manager and Assistant Manager or Leasing Agent, if any, should be staggered to provide continued coverage.



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1991 OREGON CLEAN AIR ACT requires smoking to be banned in all places where business is conducted. This includes separate rental center offices and On-Site Manager's dwelling used as rental offices.

- Smoking is not allowed in any rental office or adjacent area. Paperwork should not smell of smoke.
- Smoking and cooking odors are unpleasant and offensive; they are easily absorbed by paper, drapes and carpeting and may be difficult to clean.
- All properties managed by Norris & Stevens, Inc. will be smoke free properties as of 4/1/2017.

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APPEARANCES

On-Site Personnel are to present the best appearance possible. This is of utmost importance when marketing your community. A business-like image is expected to be maintained at all times.

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Office Exterior must be professional, while at the same time pleasing to the eye and inviting. This is a priority for the On-Site Manager.

- Keep entryways swept and free of debris and litter; remove cobwebs and bark dust off the building and entry area.
- Use mats to wipe feet; keep swept and/or cleaned.
- Keep the entry door wiped clean and the windows washed.
- Plant flowers in beds or planters to attract attention but do not overdo; properly water, fertilize and trim when needed; replace as necessary.
- Exterior decorations should be in good taste and maintained.
- Keep shrubs and trees pruned around windows and entry doors.

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Office Interior is as important as our personal appearance. It is necessary for us to put our best foot forward when marketing our dwellings. To make the best presentation, we pay special attention to appearances, our own and that of the community. As an On-Site Manager you need to know the importance of the appearance the rental center makes, regardless of whether it is a separate office area, or your own dwelling.

- Use color coordinated rubber backed mats to prevent slip and falls in wet weather on vinyl surfaces, and to eliminate deterioration of carpeted surfaces; maintain their appearance by cleaning and replacing as necessary.
- Arrange office furniture to create a warm, inviting atmosphere.
- Arrange area for visitors to sit together adjacent to the desk or in a "closing area" of the office.
- Consider accessibility for the disabled applicant or resident.
- Place the desk so as to be clearly visible as soon as the visitor walks through the door.

- The office desk should be clean and organized at all times.
- Filing cabinets and/or desk organizers should be used to keep daily work convenient and easily accessible.
- Do not allow any area - desk, floor, tops of filing cabinets - to become piled with files, books, records, maintenance tools or parts.
- Do not post the Weekly Make-Ready Report or anything used as a reference for the staff in the public's view.

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FURNISHINGS AND EQUIPMENT are necessary for the smooth operation of the rental center. The On-Site Manager is responsible for obtaining and maintaining the required furnishings and equipment. If the rental center is a separate office, additional furnishings may be necessary.



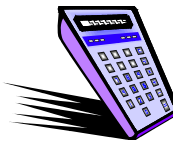
Required

Desk and Chair

File Cabinet

Visitor Chairs

Telephone



Answering Machine
(or voice mail service)

Computer

Combined Printer/Copier/Scanner

Modem

Calculator

Key Cabinet

Stapler, Tape Dispenser, etc.

Three-hole Punch

Plastic Safety Goggles

Pair of Gloves

Digital Camera

First Aid Kit

Optional



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Inventory List provides a written accounting of all furnishings and equipment at the property. This list is to be updated regularly by the On-Site Manager and the Asset Manager.

- Maintain list for office, maintenance, marketing, pool, laundry room, and items necessary for the management of the community.
- Include items that are replaced less frequently and are not supplies; example desk, lamp, stapler, hoe, screwdriver, *not* paint, paper or pens.
- Include items purchased through petty cash, purchase orders and employee reimbursements.
- Record model numbers, serial numbers, descriptions and quantity.
- Worn, broken or missing items are to be reported to the Asset Manager before removing them from future lists.

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THE RESERVE AT Hawk's Ridge
INVENTORY
Last revised: May 22, 2018

*"Disclosure: This inventory list is strictly used for internal Norris & Stevens tracking purposes only.
No claims are made herein that listed inventory is to be included in any sale;
If used to support the purchase sale of this property, be aware that it is the responsibility
of the purchaser to verify all information."*

The Reserve at Hawk's Ridge

INVENTORY LIST

Last Updated: May 22, 2018

"Disclosure: This inventory list is strictly used for internal Norris & Stevens tracking purposes only. No claims are made herein that listed inventory is to be included in any sale; If used to support the purchase sale of this property, be aware that it is the responsibility of the purchaser to verify all information."

LOCATION	AMT	ITEM DESCRIPTION	MAKE/MODEL	COST	TOTAL	DATE
Clubroom	1	Ashley sofa		\$679.20	\$679.20	08/08/14
Clubroom	2	Ashley loveseats		\$639.20	\$1,278.40	08/08/14
Clubroom	1	7.5' Canyon artificial Christmas tree		\$431.25	\$431.25	11/22/14
Clubroom	1	Sofa table		\$295.60	\$295.60	07/31/14
Clubroom	1	Cocktail table		\$271.60	\$271.60	07/31/14
Clubroom	2	End tables		\$231.60	\$463.20	07/31/14
Clubroom	1	12 cup kettle popcorn maker		\$164.99	\$164.99	09/09/15
Clubroom	1	KEURIG COFFEE MACHINE	MODEL: K2.0-500/COSTCO	\$150.00	\$150.00	12/31/14
Clubroom	2	Lamps		\$20.00	\$40.00	07/27/14
Clubroom	4	Titan Tech badminton racquets		\$15.99	\$63.96	07/17/15
Fitness Room	2	SportsArt T621 treadmill		\$3,528.00	\$7,056.00	07/25/14
Fitness Room	2	SportsArt E822 elliptical		\$2,799.00	\$5,598.00	07/25/14
Fitness Room	1	Inflight Fitness FT1000 functional trainer w/ rear shrouds		\$2,700.00	\$2,700.00	07/25/14
Fitness Room	1	SportsArt leg extension (demo)		\$2,137.00	\$2,137.00	07/25/14
Fitness Room	1	SportsArt mid rower (demo)		\$2,076.00	\$2,076.00	07/25/14
Fitness Room	1	SportsArt C521r recumbent bike		\$1,995.00	\$1,995.00	07/25/14
Fitness Room	1	SportsArt back extension (demo)		\$1,992.00	\$1,992.00	07/25/14
Fitness Room	1	SportsArt tricep extension (demo)		\$1,950.00	\$1,950.00	07/25/14
Fitness Room	1	DF106 low back/abdominal (demo)		\$1,922.00	\$1,922.00	07/25/14
Maintenance	1	63.3 cc backpack blower	Echo	\$499.00	\$499.00	05/15/15
Maintenance	1	100-lb. salt and ice melt spreader	Chapin	\$264.55	\$264.55	01/05/16
Maintenance	1	18v 6 1/2" circular saw	DeWalt	\$109.00	\$109.00	05/19/15
Maintenance	1	Portable rechargeable power station		\$88.15	\$88.15	10/22/15
Maintenance	1	6 piece tool roll kit		\$79.95	\$79.95	05/07/15
Maintenance	1	Vacuum cleaner	BISSELL POWERFORCE HELIX TURBO S/N:141981	\$50.00	\$50.00	12/31/14
Maintenance	1	Push broom	FRED MEYER/\$30	\$30.00	\$30.00	12/31/14
Office	2	Desks	MODERN WALNUT L-DESKS/OFFICE INTERIORS	\$1,300.00	\$2,600.00	12/31/14
Office	1	Filing cabinet	MODERN WALNUT LATERAL FILING CABINET/OF	\$375.00	\$375.00	12/31/14
Office	1	Laptop	ASUS MODEL:ATHEROS/AR5B125 S/N:E4NOCXO	\$300.00	\$300.00	12/31/14
Office	1	Paper shredder	STAPLES PROFESSIONAL SERIES MODEL:SPL-T	\$250.00	\$250.00	12/31/14
Office	1	ASUS X551MAV-RCLNO phone (Laptop?)		\$249.99	\$249.99	07/31/14
Office	2	Computer monitors	LCD ACER/MODEL: H236HL S/N:4025062842 & 402	\$240.00	\$480.00	12/31/14
Office	2	Computer chairs	TAN LEATHER STAPLES MODEL:25489/STAPLES	\$190.00	\$380.00	12/31/14
Office	1	Corded base phones	RCA MODEL:25260 S/N:20011126/STAPLES	\$150.00	\$150.00	12/31/14
Office	1	KEY CABINET	HOLDS 200 KEYS/EBAY	\$150.00	\$150.00	12/31/14
Office	2	McKee chair		\$149.99	\$299.98	04/12/16
Office	1	2-drawer cherry lateral file		\$141.00	\$141.00	09/20/16
Office	1	Silver display sign		\$129.99	\$129.99	11/19/14
Office	1	RCA 2 line corded telephone		\$99.99	\$99.99	07/31/14
Office	2	Wireless keyboards	LOGITECH MODEL:Y-R0009 S/N:1420SY05AEX8 &	\$50.00	\$100.00	12/31/14
Office	1	LABEL MAKER	BROTHER PT-2030/QUILL	\$50.00	\$50.00	12/31/14
Office	2	STAPLERS	STAPLES "ONE TOUCH"/STAPLES	\$50.00	\$100.00	12/31/14
Office	2	RCA telephone handsets	RCA MODEL 25055 S/N:40208779 & 40208770/STA	\$49.99	\$99.98	07/31/14
Office	1	2/3 HOLE PUNCHER	STAPLES "ONE TOUCH"/STAPLES	\$45.00	\$45.00	12/31/14
Office	3	CALCULATORS	\	\$30.00	\$90.00	12/31/14
Office	2	MOUSE PADS	STAPLES BLACK MOUSE PADS/STAPLES	\$30.00	\$60.00	12/31/14
Office	4	Trash bins	STAPLES BLACK GARBAGE CANS	\$28.00	\$112.00	12/31/14
Office	1	2-hole punch	Swingline Model 50	\$10.07	\$10.07	07/02/15
Office	3	White binders		\$3.49	\$10.47	08/30/16
Office	3	Letter openers		\$2.99	\$8.97	07/17/15
Office	3	9x12.5 tan clipboards		\$1.99	\$5.97	08/30/16
Office	3	Staple removers	Quill	\$1.99	\$5.97	07/17/15
Office	1	PRINTER	BROTHER MFC9340CDW S/N:U63481D4J337169/I	\$0.00	\$0.00	12/31/14
Office	2	COMPUTER TOWERS	DELL/PROVIDED BY NORRIS & STEVENS	\$0.00	\$0.00	12/31/14
Office	2	WIRELESS MICE	LOGITECH MODEL:R0028 S/N:1417LZ059HE8 & 14	\$0.00	\$0.00	12/31/14
Office	1	CHECK SCANNER	DIGITAL CHECK SCANNER EDS MACHINE/PROVI	\$0.00	\$0.00	12/31/14
Office	1	LEASING DESK	CELIA DESK/WORLD MARKET/\$300	\$300.00	\$300.00	12/31/14
Office	2	DESK CHAIR MATS	COSTCO/\$40	\$40.00	\$80.00	12/31/14
Office	2	Small desk drawer trays	QUILL/\$12	\$12.00	\$24.00	12/31/14
Pool	1	6 piece patio dining set with beige cushions	Beverly: model #65-23355B	\$499.00	\$499.00	05/21/15
Pool	10	Pacific Brown all-weather adjustable resin patio chaise	lounges with side tables	\$144.50	\$1,445.00	05/13/15
Pool	2	9' taupe rectangular solar-powered patio umbrellas	Model 50400146-WEB	\$135.15	\$270.30	05/21/15
Pool	2	Black patio umbrella bases	Model #DUMB-50	\$99.00	\$198.00	05/21/15
Pool	1	Black umbrella base with wheels		\$68.60	\$68.60	05/26/16
Pool	1	Pool leaf rake		\$50.95	\$50.95	06/01/16

TOTAL

\$41,625.08

Office Signs and Posters should be up-to-date and professional looking. Personal items, cartoons, and posters should not be displayed. Thank you notes from residents are fine because they show we are doing a good job and may encourage others to also recognize your work. However, personal motivators such as the kitten hanging by its paws from a limb with the slogan 'Hang in There' may be telling others you do not like your job or where you work. If you need such motivators, restrict their placement for your viewing only.

- Post all management signs, notices and guidelines preferably in a single matted and framed display, and hang in a visible location. If separate, then group appropriately, and hung evenly.
- Maintain one by keeping the most up to date documents displayed and dust periodically. Find the most recent posters in Docs Box under Management Forms; Posters: Housing.
 - ▶ Rent Payment Policy
 - ▶ Federal Fair Housing Poster
 - ▶ Occupancy Guidelines
 - ▶ What Is the Application Process?
 - ▶ Our Rental Guidelines
 - ▶ What If I Want To Be Put On A Waiting List?
 - ▶ What Do I Do If My Application Is Denied?
 - ▶ ID Required Before Viewing Poster
- Use professionally created signs when away from the office ('At the Pool', 'On the Grounds', 'Out to Lunch', 'Back in 15 Minutes'); these signs, when not in use, are to be stored conveniently, but out of sight; *Do not* use handwritten signs or post-its taped to the door or wall.
- Other notices such as '*No Smoking*' can be displayed with professional plaques or signs; *Do not* use signs that are 'neon' and stand out so obviously they cause a distraction to the overall appearance of the interior or exterior of the office.
- *Do not* post signs, posters or other items that reflect a protected class - race, color, national origin, sex, familial status, handicap status, age, marital status, source or income, or sexual preference to avoid possible discrimination accusations.
- Post all employment posters where employees can see them. An appropriate place might be the maintenance garage or some space exclusively used by rental staff. Some managers work out of their home, in which case, these can be posted somewhere inconspicuous to the public, like inside a closet door.

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NOTEBOOKS AND REFERENCE BOOKS are to be kept updated and current at all times.

Building Notebook should include the following:

- General map of the property and parking lot.
- Emergency shutoffs.
- Insurance carrier, agent name, address & telephone number. Contact Forms@Norris-stevens.com to update.
- Emergency telephone numbers.
- Vendors' telephone numbers and account numbers.
- Copies of vendor contracts for landscaping, security, or lot sweeping, etc.
- Utility carriers and the telephone numbers, and meter numbers to identify the common area's billings from resident's billings.
- Appliance model numbers, which can also be saved in Docs Box under each dwelling.
- Inventory list.
- Neighborhood amenities and schools.
- Pool/spa maintenance instructions, if applicable.
- Pool/spa State of Oregon Statutes, if applicable.
- Pool/spa opening/closing checklists.
- Market surveys.

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MSDS Notebook - Material Safety Data Sheets.

- If you do not have a copy of this notebook, you may order one through Norris & Stevens by emailing forms@norris-stevens.com or download individual sheets from the chemical company or a copy from vendors such as Home Depot, Lowes HD Supply or Wilmar.

* * *

Daily Log

- Use a spiral notebook to record daily notes regarding residents, vendors, and neighborhood concerns. Record changes in the screening policy, rent rates, landlord/tenant law and property policy.
- Write the name of the community and the dates covered on the outside cover.

* * *

Purchase Order Notebook should be used to maintain forms and control written purchase orders.

- Include the Purchase Order Log.

* * *

Trespass Law Notebook is used to maintain the information necessary to enforce the trespass laws. The notebook should include:

- The letter to the Chief of the Police Department.
- A copy of the "person in charge" statement and "criteria for exclusion from property" found in the Rules & Regulations for Better Living handbook.
- A map of the community.
- All exclusion notices issued in chronological order.

* * *

MANAGEMENT FORMS are provided by Norris & Stevens, Inc. All approved forms are listed in the Forms Manual and can be found in Docs Box or ordered from forms@norris-stevens.com.

- Use only approved forms.
- Use only current forms in Docs Box; do not use outdated copies.
- Order all supplies in writing through Norris & Stevens Inc at forms@norris-stevens.com, with the following exceptions:
 - ▶ Order pool/spa recording sheets by calling your local county health department: For example, Multnomah County 248-3400.
- When instructed, make copies of Norris & Stevens, Inc. forms on your office copier or at a professional copier such as Kwik-Kopy or Kinko's.
- Store management forms separately from "record keeping" files; do not mingle forms with resident files, maintenance files, or weekly/monthly report files.

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MANAGEMENT FORMS REQUEST

- Use a Management forms request to order forms and supplies by emailing forms@norris-stevens.com as needed.
- Use the form to organize your supply in the order listed and to take inventory before re-ordering.
- Keep the original in the "Purchase Order Notebook" to keep track of orders.
- Keep a blank copy in the "Building Notebook" to use as needed.

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RECORD KEEPING organization is the responsibility of the On-Site Manager. Contact the Asset Manager if assistance is needed. Do not allow records to become damaged with coffee spills, notes or smoke odors.

Resident Files are to be kept for seven (7) years. This includes all agreements, notices, complaints, notes, etc. Maintain a separate filing system per classification of resident:

- ▶ **Current Residents** maintain current resident files numerically by dwelling number; transfer the resident file only (not maintenance records) to "Former Residents" storage after completing the Move-In/Move-Out and Final Accounting.
- ▶ **Former Residents** store previous residents chronologically by the month and year they moved out.
- ▶ **Denied or Withdrawn Applications** are to be mailed to Norris & Stevens to be stored and disposed of safely.
- ▶ **Guest Cards** are to be kept for seven (7) years

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Maintenance Records are to be maintained for the life of the property.

- Create a file folder for maintenance records for each dwelling, and store numerically by dwelling number in the same pocket with the resident files - "Dwelling Maintenance File"
- File copies of maintenance requests, bids, invoices, packing slips, etc. in chronological order within the maintenance file.
- **Maintenance and repair requests.**
 - ▶ File the original/white copy in the "Dwelling Maintenance File".
 - ▶ File the second/yellow copy in the "Maintenance Request File" in chronological order.

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Weekly and Monthly Reports are to be maintained for seven (7) years.

- Weekly Traffic Report and Weekly Occupancy Report
- Weekly Make-Ready Report
- Petty Cash Request
- Purchase Order Request and Purchase Order Log in the "Purchase Order Notebook".
- Time Sheets, Earnings Request, and Reimbursement Request are to be retained by the employee.

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Miscellaneous Reports are to be maintained for one (1) year. File the reports chronologically in the following order after the weekly/monthly reports:

- Complaint Report
- Annoyance Log
- Accident Report and Incident Report) are to be filed together.

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TELEPHONE SERVICE, AND HIGH SPEED INTERNET at your community is provided by a business like Comcast. Any telephone call must be answered in the name of the community, followed by your name. Household members, who are not employees, are not to answer the phone.

Business line service

- If the community's phone service is forwarded to your cell phone, then any outgoing message must identify the community's name and you must also answer the phone with the community's name and identify yourself.
- There should be no messaging and/or texting to potential, current, or former residents with your personal cell phone.
- The On-Site Manager is not authorized to change the telephone service (if necessary, request your Asset Manager to arrange for changes in telephone service).
- On-Site Managers are authorized to request maintenance service on the telephone line.
- Use of the internet service is only for business use. Managers as well as members of their household should never use the internet for personal purposes due to the high risk of downloading viruses that can be passed on to other properties. Managers who violate this policy are subject to termination and will be charged for any needed repairs.

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Answering Machines & Voice mail may be the property of the community or one owned by On-Site Manager. It is On-Site Manager's responsibility to know how the machine operates and how to create an appropriate answering message. If the machine belongs to the community, make sure you have an operating manual to assist you in retrieving, recording, or answering telephone calls.

- The use of answering machines are a convenience to the On-Site Manager as well as the caller. *Do not* allow the machine to be used when you are available to answer the telephone. To allow you enough time to pick up the phone, but not too long that the caller hangs up, set the number of rings allowed to three (3).
- Your message is a form of advertisement and should contain all the necessary points, even when forwarded to your personal phone:
 - ▶ Name of community.
 - ▶ The On-Site Manager's name.
 - ▶ Location.
 - ▶ Amenities.
 - ▶ Personal message.
 - ▶ Invitation to leave a message or visit.
 - ▶ Thank you.
 - ▶ Change messages often.

 Example message: *"Hi! This is Jeannie at Summer Meadows. I'm out helping one of our residents right now, and I'm sorry I missed you. If you're calling for information, our community has 1 and 2 bedrooms available, overlooking a forested stream, and yet convenient to downtown. If you'd like, please visit us at 829 South Riverview Road or please leave your number and your name, and I'll call as soon as I return. Thanks for calling!"*

- Be careful to avoid background noise when recording message.
- Always check and return messages promptly.

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TELEPHONE TECHNIQUE is a learned response to aid you in selling the dwellings. The call becomes an opportunity for you to make a date for your prospect to see your community. When the phone rings, catch your breath, collect your thoughts, smile, and then answer the phone. You will relay a more pleasant and inviting message when you are relaxed and enthused about the call. Never allow yourself to sound rushed, out of breath, or too busy to help the caller. If you are on another line, or have someone in your office so you cannot talk, politely ask them to hold, or obtain their name and number and give them a time you will return the call; do not put someone on hold without their permission. If at all possible, do not let them get away without you first getting their name and telephone number.

The telephone should be answered by the On-Site Manager(s), Assistant Manager, or Leasing Agent. Other persons will not be able to help the caller with information regarding rentals. If the telephone is answered by someone else, it should be made clear the manager is not available and a message will be taken.

- Keep the answering machine or service off as much as possible; do not screen calls.
- Answer all calls on the second or third ring.
- Never put a caller on hold more than seven (7) seconds.
- Take a breath and answer the call in your warmest, most enthusiastic voice.
- Always give the name of the community and introduce yourself.
- Get the caller's name as soon as possible and use it.
- Write down the caller's needs and refer to them during the conversation.
- Repeat to the caller what they tell you and state how you will help them.
- ***Ask the caller to visit*** and confirm all details discussed.

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COMBINED PRINTER/COPIER/SCANNER MACHINES are usually provided at each property.

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FAIR HOUSING LAWS prohibit the "differences in the treatment" of persons in connection with the provision of services and facilities because of race, color, religion, sex, handicap, familial status, source of income or national origin. Limitations on the use of privileges, services or facilities are also discriminatory housing practices. Common areas must be handicapped accessible if any resident requests the accommodation because of a handicap.

Unless your community is "Housing for 55 and Older", you will not be able to discriminate against children. This means, you cannot treat or set policies differently for children than adults. The rules and policies for your recreation facilities, laundry facilities, and other common areas must be stated toward all "persons" not separately to "children" and "adults".

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OREGON DEPARTMENT OF HEALTH (ODH) issues permits for the operation of swimming pools and spas. The rules under Oregon Administrative Rules, Chapter 333 requires all non-swimmers and children under fourteen (14) years of age be accompanied by a responsible adult observer. This rule is to be posted and adhered to because of the potential health and safety risks involved. To obtain a current copy of the Oregon Pool and Spa Rules, you can locate it at www.public.health.oregon.gov.

WASHINGTON STATE DEPARTMENT OF HEALTH (DOH) issues permits for the operation of swimming pools and spas. Washington State rules require all non-swimmers and children under thirteen (13) years of age be accompanied by a responsible adult observer and children ages 13-17 cannot use the pool alone. This rule is to be posted and adhered to because of the potential health and safety risks involved. Find current safety rules at www.doh.wa.gov.

These rules, however, do not apply to the recreation room, laundry facility, or other common areas. Make sure a copy of the rules is placed in the "Building Notebook."

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STATE OFFICE OF SERVICES TO CHILDREN AND FAMILIES

(SCF) (formerly CSD) regulations require children under ten (10) years of age to be under the supervision of an adult. This is a SOSCF regulation and not one the landlord can use. The only recourse is to report unattended children to SOSCF for their action, if any.

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AMERICANS WITH DISABILITIES ACT (ADA) requires all common areas available to the public be handicap accessible. A policy may be set that prohibits the public from using any common area other than the rental center (e.g., swimming pool, recreation facilities, and laundry facilities).

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OREGON RESIDENTIAL LANDLORD AND TENANT ACT (ORLTA) requires all buildings, grounds, appurtenances (something added; an accessory), and all areas under the control of the landlord must in every part be clean, sanitary, free from all accumulation of debris, filth, rubbish, garbage, rodents, and vermin, and in every part *safe for normal and reasonably foreseeable uses* at the beginning of the rental agreement. This includes parking lots, play areas, and common areas per ORS 90.320(1)(f).

UNLAWFUL OR ILLEGAL ACTIVITIES

- Violation of any city, state, or national law by the resident, by persons invited onto the premises by the resident, or by persons under the resident's control may be deemed sufficient cause for immediate termination of tenancy.
- Any disorderly or loud conduct which disturbs the peaceful enjoyment of the premises.
- Do not allow persons to congregate by sitting on cars, dumpsters, electrical boxes, or fences.

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SWIMMING POOLS are an easy-to-spot mark of a well-run community. The proper supervision of pool operation and maintenance will reduce problems and keep residents happy.

Pool Operation

- Pool license must be current and posted before the pool can be opened for resident use. The "Limited-use Public Swimming Pool" license allows management to restrict the use to residents and their guests only.
- Pool hours shall be 9 a.m. to dusk daily during the swim season (Memorial Day to approximately Labor Day).
- Pool temperature should not be set above 76°F. The cost to heat the pool beyond this setting is prohibitively expensive. Your Asset Manager may request the heater not be used for the pool during the hottest summer months.
- Pool Operators Handbook should be readily available for use and by the operator; its contents should be revised as often as necessary. Follow the directions on the chemical containers. A well-maintained facility with sparkling blue water is an irresistible temptation in hot summer weather. It may make the difference in the occupancy rate of your building.



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DAILY RECORD OF SWIMMING POOL OPERATION

- Use this form to record the daily testing of the pool.
- The On-Site Manager is to complete this form by using one page per month; the Assistant Manager or Maintenance Supervisor must complete this form during their work hours.
- Record information during pool "open" periods; indicate any days the pool is closed.
- The testing times should be standardized for more accurate results.
- The person testing the pool should indicate doing so by placing their initials on the appropriate line.
- Keep the original copy in the "Pool/Spa Notebook."

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OPENING THE POOL/SPA INSPECTION CHECKLIST

- Use this checklist when opening the pool/spa in the spring.
 - The On-Site Manager is to complete this checklist; the Assistant Manager or Maintenance Supervisor may complete the checklist with the approval and direction of the On-Site Manager.
 - Keep the a copy in the "Pool/Spa Notebook."
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- Pool privileges may be defined by each community. Limitations can be set for the pool use restricting to residents only or limit the number of guests.
 - ▶ The definition of "responsible adult observer" should be a person over eighteen (18) years of age who is a resident of the community.
 - ▶ The number of non-swimmers, and/or persons under fourteen (14) years of age a "responsible adult observer" may watch is limited to four (4).
 - ▶ Only two (2) guests may accompany a resident per any one dwelling at any one time.
 - On-Site Managers may rescind pool privileges or close the pool at any time deemed necessary; privileges may be rescinded for violations of the Oregon Department of Health rules or the community's rules.

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CLOSING THE POOL/SPA INSPECTION CHECKLIST

- Use this checklist when closing the pool/spa in the fall.
- The On-Site Manager is to complete this checklist. The Assistant Manager or Maintenance Supervisor may complete the checklist with the approval and direction of the On-Site Manager.
- Keep the original copy in the "Pool/Spa Notebook."

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POOL/SPA SUSPENSION NOTICE

- Use this notice to discipline the resident(s) or guest for major or repeated violations to the pool or spa rules.
- The On-Site Manager is to complete this notice and send a copy to the Asset Manager. The Assistant Manager may complete the notice with the approval and direction of the On-Site Manager.
- Enter the name of your community, the name of the resident(s) and the dwelling number.
- Enter the name of the person suspended from the pool or spa.
- Enter the date and time of the violation.
- Check the type of violation and describe what occurred.
- State the suspension period; this may be two (2) days to indefinitely depending upon your community rules and the nature of the violation.
- Provide the name(s) of any witness to the violation.
- Comments may include reference to other suspensions/notices, other action taken by management, or charges for damages, if any.
- Give a copy to the resident(s).
- Keep the original copy in the "Property Notebook."

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CLUBROOMS AND RECREATION

- Facility Rules are necessary to maintain control of the facility. Any damage caused by a resident or their guest will be charged to the resident at the actual cost to replace the item new. Attention should be given to, hours of use, guests, damage deposits or fees, if any, signed agreements for use and rental rates. Coordinate with your Asset Manager for specific rules for your community's club room.
- Clean recreation rooms on a daily basis; be certain furniture is clean, equipment is neatly put away, floors vacuumed or swept, and items dusted.
- Wash windows regularly; never leave smudges or streaks; wash screens and remove all cobwebs.
- Keep all appliances (ranges, refrigerators, garbage disposals, air conditioners) clean and in good repair.
- Do not allow the area to become a storage facility.

* * *

CLUBROOM OR RECREATION ROOM AGREEMENT

- Use this agreement when the clubroom or recreation room is to be used exclusively by a resident, such as for a private party, meeting, etc.
- The On-Site Manager is to complete this agreement and make two copies; the Assistant Manager can complete the agreement with the approval and direction of the On-Site Manager.
- Give a copy to the resident(s) who is renting the facility
- Keep the original copy in the "Resident's File"

* * *

PLAYGROUNDS may be provided for the residents of the community. Although the equipment is usually designated for a particular age group, be careful when referring to the users of the equipment as "children" to avoid the possibility of a fair housing complaint.

- Watch for dangerous situations; use the "common sense" approach.
- Discourage residents from using equipment that was not intended for their use (e.g. weight limitations).
- Regular inspections should be made for wood splinters, rough metal edges, or other safety concerns.

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LAUNDRY ROOMS may provide a convenience for our residents as well as become a marketing tool to new prospective residents. They can, however, be a danger spot if special attention is not paid to their design and maintenance. The laundry facilities should be made available to only residents of your community.

- Adequate space should be provided for the equipment, working, for passage, and for servicing.
- If a wash tub is provided, keep it clean and clear of clogs.
- Provide sufficient lighting both inside and on the path to the laundry facility.
- Set out "Wet Floor" signs after mopping floors.

Operations

- Hours for the laundry room should be the maximum each day, depending upon location and the resident profile.
 - ▶ Hours should be posted.
 - ▶ Enter the posted times in the Rules and Regulations for Better Living, page 11.
 - ▶ For security reasons and to minimize disturbing residents who live nearby, 8 a.m. to 10 p.m. are typical hours of use.
 - ▶ Weekends get the heaviest use; check and clean the laundry room more frequently.

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PARKING LOTS AND DRIVEWAYS

Handicap Accessibility

- Designated handicapped space must have a 6-foot wide access aisle on the passenger side of the vehicle to be located in the vicinity of the rental center; the Rotary or Lions organizations offer assistance in providing ramps, etc.

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Facility Rules

- Occasionally a parking situation will arise that will necessitate changes in your community's current parking situation. These should be brought to the attention of your Asset Manager. They will be able to help you create a parking plan that will provide safe and adequate parking at your community.
- Unless a car wash is available, no cars may be washed on the premises; the detergents used damage the asphalt.
- Maintenance is not to be performed on any vehicles while parked on the premises; this includes flushing the radiator and changing the oil.
- All vehicles must be properly parked; no boats, trailers, campers, etc. are allowed unless there is designated parking on the premises.
- All vehicles must be parked head-in only; do not allow back-in parking; this will prevent fumes and noise from exhaust from entering the buildings and provide a more uniform appearance.

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GARBAGE ENCLOSURES

- If you have a broken dumpster on your property, call the garbage hauler for immediate action to be taken.
- Do not turn the dumpster upside down or allow it to be used if it is broken; residents can become injured by faulty equipment falling or rolling on them.



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WALKWAYS AND SIDEWALKS

- Monitor daily for safety concerns (broken glass, bicycles, etc.); take immediate action.
- Keep sidewalks and walkways swept and free of dirt, mud, and debris.
- Flush away sidewalk chalk with a garden hose at the end of each day.
- Grind or caulk cracks to eliminate a tripping concern.
- Shifting sidewalks that have created tripping problems should be brought to the Asset Manager's attention.
- Ice melt should be used on all walkways when necessary during winter months. Urea works well as an ice melt; it does not cause damage to concrete or plants because it is a fertilizer. (Sand is also a good traction aid.)



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BUILDINGS

Roofs should be inspected periodically to remove any accumulated debris that might plug a drain or gutter; these inspections should be done in the fall while leaves are falling.

- Failure to keep drains open on flat roofs will encourage leaks and often result in serious damages.
- To kill moss on roofs use chemical applications such as Moss-Kil® (do not use a lawn moss killer on roofs); or use 5% commercial granular bleach, or use Tide® with bleach. Unless the owner has given written permission, on-site personnel are prohibited from climbing ladders to clean gutters or walking on roofs.

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Gutters

- Cleaning must be performed by an approved vendor. Unless the owner has given written permission, on-site personnel are prohibited from climbing ladders to clean gutters or walking on roofs.
- Use a vendor on two-story buildings or higher.
- Precautions must be taken when walking on the roofs because there may be a buildup of moss, which makes standing on them very hazardous.

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Exterior Lighting

- Monitor all exterior lights daily; replace bulbs as necessary especially in areas that are in the shadows, out of view by passing traffic, or could be a possible safety issue.
- Adjust automatic timers for lighting and equipment for summer months and daylight savings time.

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Outside Hose Spigots

- *Winterization:* remove all hoses from outside spigots; drain, roll, and store them in a dry, heated area; turn off water to outside spigots or wrap with insulation and cover with a plastic garbage bag.

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LANDSCAPING/LANDSCAPE VENDORS may provide complete landscape maintenance, or share responsibilities with the on-site personnel for some communities.

Contracts should include the specific duties to be performed by the vendor. They usually include all or part of the following:

- *Lawn care* - mowing, edging, fertilizing, liming, weed and insect control.
- *Shrub care* - pruning, fertilizing, monitoring and/or treatment for root weevil and spider mites.
- *Beds* - applying pre-emergent and post-emergent weed control, and leaf removal in the fall.
- *General cleanup* - blow walkways (not parking lots).
- *Irrigation system* - turning system on and off, inspecting and monitoring the system.
- *Extra features* - aeration and thatching lawns, applying dormant spray, hand-removing weeds, planting annuals, inspecting irrigation backflow devices, spreading bark dust.



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The Working Relationship between the landscape vendor and the On-Site Manager should be one of mutual cooperation. Landscapers must check in with the On-Site Manager prior to commencing any work. This gives the On-Site Manager the opportunity to discuss with the landscapers any particular problems or needs that should be addressed that day while the landscaping crew is present and working.

- Discuss any item not being addressed with the landscape crew, but listed on the landscape contract when the vendor "checks in" on their scheduled maintenance day. If the vendor does not address the problem or concern as requested, and is a part of their contract, call your Asset Manager and discuss the situation immediately.
- Vendors will not perform any requests made by the On-Site Manager for items not listed on the landscape contract; discuss with your Asset Manager these particular requests.
- The On-Site Manager should handle any immediate problem or concern without waiting for the scheduled landscape maintenance day (e.g., trim loose or dangerous branches or weed areas in front of the rental center or site sign).

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A MARKETING STRATEGY should be developed for every dwelling community. Marketing techniques should be periodically evaluated, changed or implemented in a manner that produces the best results for your community.

- Understand fair housing laws.
- Make sure all on-site personnel involved in the leasing process thoroughly understands the goal and what it takes to reach that goal.
- Strive to maintain 95% occupancy - determine the number of vacancies that will be turning over each month, the number of applicants it takes to fill one vacancy, and what type of incentives or attractions are necessary to generate the required traffic.
- Know your competition - shop other communities to compare rents and services offered.
- Keep your Asset Manager informed of the current number of vacancies and those residents that have given notice by completing a weekly occupancy report.
- For the best results, discuss the marketing strategy with your Asset Manager on an ongoing basis.
- Prepare a Weekly Traffic Report to determine the results of the advertising methods used.
- Maintain the appearance of your community - this includes the grounds, office, and *you* - so you will attract the best prospects.
- Provide good service to your existing residents to create referrals and encourage longer tenancies.
- Remember, marketing is a very important part of the On-Site Manager's responsibility; it will require time, imagination, and the right attitude to be successful.

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Marketing Audit should be conducted periodically by the On-Site Manager to ensure all steps are being followed to attract prospective residents, prepare vacant dwellings, and keep the on-site personnel trained and up-to-date. Keep the Audit in the Building Notebook.

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Occupancy Report tracks the activity on a weekly basis by dwelling type. This report helps the On-Site Manager and Asset Manager create the appropriate marketing plan predicated upon the number of current vacancies or knowledge of future vacancies.

- The goal is to have occupancy maintained at 95% with vacancy no more than 5%.

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WEEKLY OCCUPANCY REPORT

- Use this form to report the number of vacant dwellings, notices, and commitments received during the week. A committed application is one that has been approved by RSS, and not in pending status.
- The On-Site Manager is to complete this report and email it to their Asset Manager at Norris & Stevens no later than Sunday evening.
- All sections are to be completed, otherwise write zero (0).
- Complete the calculation at the bottom to determine the percentage of expected vacancies; the target is 5% or less.
- Keep a copy in the file labeled "Weekly Reports."

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Curb Appeal refers to the concept of how a community looks to an outsider from the street. More than 50% of your traffic will be generated by those just driving by. Many items go into making a property that has good curb appeal. For a property to have good curb appeal:

- Signage should look crisp and clean; wash or repaint the signs frequently.
- Signs should be clearly visible. Banners should not be torn or faded.
- Directional signs to your rental center should be well placed and maintained so that a prospective resident can easily locate the rental center.
- Have lawns mowed and edged regularly.
 - ▶ During summer months, water as necessary to avoid brown patches.
 - ▶ Apply moss control, fertilizers and pesticides as necessary.
 - ▶ Eliminate or control weeds in lawns and flower beds.
 - ▶ Eliminate moles & gophers from lawns and flower beds.
 - ▶ Remove debris from flower beds and rake bark dust.
 - ▶ Trim trees and shrubs to restrict their height and keep them from rubbing and overhanging buildings.
 - ▶ Pools should be a sparkling clear blue.
 - ▶ Remove trash and natural debris from parking areas.
 - ▶ Soak up oil and other car fluid leaks.
 - ▶ Re-paint curbs and re-stripe parking lot lines when faded.
 - ▶ Restrict the storage of inoperable or other vehicles on the premises.
 - ▶ Inform your residents to keep their entryways and patios/decks clean and tidy.

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CHECK YOUR COMMUNITY'S IMAGE

<i>Outside Impressions</i>	<i>Inside Impressions</i>
Is the community easy to spot from your car with an easy to read sign?	Is there a smell that you notice?
Is the view of the sign being blocked by trees, scrubs or flowers?	Is it pleasant?
Does the sign convey that you are dwellings or rentals?	Is the atmosphere quiet?
Does the signage look fresh and clean?	Is there background music? Is it appealing?
Does the property appear prosperous? Well maintained?	Is the room you entered neat and clean?
Are people in and around the community well dressed?	Do you have to hunt around for someone to assist you?
Was it easy to find a parking space near the rental center?	Is the staff polite and competent?
Are the cars in good repair?	Is their dress appropriate?
Are the curbs and parking area in good order?	Within a few seconds of entering, did you feel interested and comfortable?
Is the landscaping neat and trimmed?	If you were a prospective resident would you be interested in leasing?
Are the flower beds free of weeds?	
If you were a prospective resident would you stop to see a dwelling?	
Exterior lights present and maintained?	
If some of these questions were answered "no", start thinking about how your community can improve its image. If the majority of these questions were answered "yes", you probably have a good image. Can it be fine-tuned?	

An Asset Manager'S PET PEEVES

- Carpet remnants used instead of welcome mats.
- Torn or faded flags.
- Grass in sidewalk and parking lot cracks.
- Messy desks in the rental center.
- Dirty pool or spa.
- Unkempt looking On-Site Personnel.
- Weeds anywhere or grass where they shouldn't be.
- Cigarette butts . . . anywhere.
- Dead flowers, shrubs, or grass.
- Rent-readies that aren't perfect.
- Smoking, drinking or eating by on-site personnel in the rental center
or on the grounds.
- Dirty dumpsters - ask the hauler to paint the dumpster, if necessary.



Rental Center is included in the curb appeal of the community; it doesn't end at the doorstep of your rental center. The cleanliness and air of professionalism that the rental center projects is just as important.

- Be certain that the door is clean and freshly painted.
- Trash or debris should not be present, especially near the entry.
- Office hours are not to be posted - instead, just use a simple "Open" and Closed" sign.
- Make sure there are no unpleasant odors or smells.
- Maintain a comfortable room temperature.
- Arrange the office furniture so that you can greet visitors openly with no obstacles between you and them.
- If the room is large enough, use a "closing corner"; this could be a small table for you to sit down at with your prospects, away from the formality of the desk.
- The desk must be clean and uncluttered; try and have only the telephone, a pen or pencil, your business cards or brochures, and a calculator on the desk.
- In view upon entering, offer an edible treat, and ice water or coffee.
- Plants should be used to create a home-like setting; they add color and warmth to any room.
- Use the guest cards available in Docs Box.
- Play background music that is appropriate for the targeted future resident.

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You Are the Product, are **you** rent ready? The on-site management team must possess the necessary skills, take the necessary actions, and display an appropriate appearance. All other things being equal, a prospective resident's decision to rent is most often based upon whether or not they liked the person that they met when they arrived at your community. No matter how good the property looks, or attractive the rent amount, if the On-Site Manager or leasing agent looks unkempt, is grumpy, or otherwise acts as if they don't care, a prospect will not rent.

Be helpful and informative. You must know what your property has to offer, and what your competitors are offering.

- Before you sell anything, you have to sell yourself; shoes shined, clothes clean and pressed, fingernails and hair clean and well groomed, appropriate make-up, clean shaven or neatly trimmed; treat the prospect like you would like to be treated.
- Smile when greeting guests and residents.
- *STAND* when a prospect enters the office and offer to shake hands.
- Always be interested in the prospect or resident, and show it - give your full attention to the things the prospect says and does. Use their name often, it shows interest.
- If an interruption occurs, be certain to excuse yourself.
- Project a positive mental attitude.
- Display enthusiasm and a high level of energy.
- Show self-confidence; that means you believe in yourself, your ability and your product.
- Be persistent; it takes an average of seven attempts to close.
- Be likable and sensitive to the needs and feelings of others; understand and relate to people.
- Sell what best fits the needs and wants of your prospect.
- Never over-promise or under-deliver; do not jeopardize a future relationship.
- Always be dependable; keep appointments, show up on time and meet commitments.
- All Norris & Stevens, Inc. properties are non-smoking effective April 1, 2017. This includes offices, grounds, parking lots, interior dwelling and exterior patio/decks.

EXPECTATIONS

Winning the prospect's acceptance and confidence is a major step toward securing the signed rental agreement.

The qualities the prospect is seeking are:

- ▶ Acknowledgment. Acknowledge them immediately with a smile.
- ▶ Enthusiasm regarding the property.
- ▶ Expertise. Be knowledgeable about your property and the area.
- ▶ Friendliness and a positive attitude.
- ▶ Honesty. Stand behind your promises.
- ▶ Genuine interest and concern. Make each client feel important. Fill the needs of the prospect.
- ▶ Personal attention. Use of their names.
- ▶ Courtesy. Be patient and have time for the prospect.

Winning qualities of the On-Site Leasing Personnel include:

- ▶ Belief in the product. Speak in positive terms.
- ▶ Dependability.
- ▶ Enthusiasm. Smile, be happy and pleasant.
- ▶ Excellent listening skills. Listen completely when prospects speak.
- ▶ Excellent communication skills. Use proper diction and phrasing.
- ▶ Good memory. Uses the prospect's name often during the presentation.
- ▶ Interest in people. Express genuine interest in the needs and wants of the prospect.
- ▶ Knowledge. Read current dwelling advertising and current dwelling magazines.
- ▶ Positive mental attitude. Believe in your ability and the product.
- ▶ Patience and tact.
- ▶ Product knowledge. Knows the community and its benefits and competition.

TRAFFIC GENERATION

Site Signs are used to identify and draw attention to your community.

- Signage should look crisp and clean.
- Wash signs frequently.
- Repaint when colors have faded.
- Keep directional signage to the office clean, visible, and in good repair.
- Install flags or banners at the entry way for attention.
- Do not nail or tape balloons, banners or notices to site signs, attach them to the "Now Renting" A-boards instead; don't allow work tools to lean against them or for them to be used as a bench.
- Replace faded flags or banners as necessary to maintain a crisp, clean appearance.
- Maintain the surrounding landscaping to enhance the sign.
- Plant seasonal flowers to draw attention to the site sign and to add color.

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Graffiti or "tagging" is becoming extremely commonplace from low-end properties to extremely high-end regardless of the location.

- Remove the same day it is discovered.
- Wear gloves and use an epoxy paint remover or a cleaning product called [ZepPride®](#)
- Monitor the area for reoccurrence.

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Flags and Banners are a way of communicating an unspoken message. Before purchasing flags and banners always consult your Asset Manager.

- When choosing colors, remember it is the movement that attracts attention not the color; choose a color that compliments the color scheme of the community.
- If possible, buy a flag with the community logo.
- Do not use faded or torn banners/flags.
- Change banner/flag colors often; use attractive rather than distractive colors for curb appeal.

Craig's List should be posted three (3) times daily if there are vacancies. Have a stable of 21-42 completely different ads to avoid "ghosting". Be sure to include contact information and dwelling details. Sign out, if you have an account, and search for your listing to verify it posted.

Facebook should be updated with any available dwellings.

You Tube is also a great way to market. You can create a tour of the property, showing amenities and dwellings as they come available, and are ready to rent. This is a great tool to cross post on Facebook.

Referrals are great! If you do not have an dwelling available, get the prospect's inquiries contact info and details to share it with other communities that may have an opening. Go to the website for Norris & Stevens and click on "Looking for a Dwelling to Rent?" Fill out the form to share the referral. Follow up with email referrals you receive this way!

Specialty Magazines like *For Rent* and *Apartment Guide* can be helpful because they specifically target the person who is looking for a new home. However, they are very expensive and seldom used. They require your Asset Manager's approval.

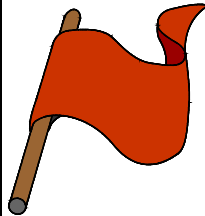
Other on-line services like www.rent.com, www.zillow.com, www.apartments.com, www.oregonlive.com, and www.forrent.com are available for you to use. On-site Managers should monitor the property's page on www.norris-stevens.com and any other websites your property uses for advertising. Track how many referrals you receive from such websites to determine whether it is beneficial.

Classified Advertising is used from time-to-time to bring new or additional prospects to your community. Ads are to be placed by the Asset Manager. You may be asked for input on creating and placing an ad. Check your ads for accuracy and attach a copy on the Weekly Occupancy Report. By reviewing these ads, your Asset Manager can determine which paper and type of ad brought the best response.

Yellow Pages advertising is provided as a free listing with any business line. Yellow page solicitors try to coax On-Site Managers to advertise in publications other than the local telephone book. Unless authorized by the Asset Manager, no other yellow page advertising is to be obtained.

TRAFFIC GENERATORS

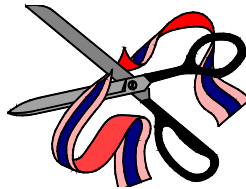
- ▶ A-boards
- ▶ Balloons
- ▶ Flags



- ▶ Bus Banners
- ▶ Social Media Presence
- ▶ Marketing Calls
- ▶ Guides
- ▶ Local Magazines
- ▶ Flyers
- ▶ Open Clubhouse
- ▶ Vendor Referrals
- ▶ Employer Newsletters
- ▶ Direct Mail
- ▶ Postcards



- ▶ Ticket to the Event Promotion
- ▶ Sponsor blood drive
- ▶ Sponsor telethons
- ▶ Sponsor charity events
- ▶ Coloring Books



- ▶ On Campus Booth

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Brochures, Flyers and Business Cards should be used to inform and remind prospects what your community has to offer. Too often, they are printed up, only to gather dust in a corner of the rental center, because the On-Site Manager or Leasing Agent forgot to give a card or brochure to a prospect when they leave.

- Name of the community
- Name of the On-Site Manager
- The community address
- The community telephone number
- All amenities
- Map or directions
- The Norris & Stevens, Inc. logo
- The Fair Housing Logo

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Brochures should be given to every prospective resident when they leave your office. Don't wait for them to ask for one or pick one off your desk.

- Keep information current
- Use the community logo to spread uniformity through all advertising sources
- Flyers and brochures should be original and not copied as to maintain a professional appearance
- Reorder these items by emailing barbaram@norris-stevens.com

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WHAT IS AN AMENITY?

- ▶ Assigned parking
- ▶ Carport
- ▶ Garage
- ▶ Outside storage
- ▶ Dishwasher
- ▶ Washer/dryer hookup
- ▶ Ceiling fan
- ▶ Air conditioner
- ▶ Laundry facilities
- ▶ Pool/spa
- ▶ Clubroom
- ▶ Sauna
- ▶ Tennis courts
- ▶ Close to shopping
- ▶ Close to bus line
- ▶ Natural setting
- ▶ Ample Storage

Example: “We have measured this closet and did you know it will hold “X” amount of clothing on it’s rod?”

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Open Houses and get-togethers are an easy way to make your rental efforts special.

- At holiday times, have small amounts of goodies available - candies, cookies, or sweets
- Hot chocolate and cider in the fall or lemonade in the summer provide nice refreshment and a break from the usual coffee grind
- Never serve alcohol!

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Referrals and word of mouth are the cheapest forms of advertising because it is created based upon the quality of product we manage and the quality of service we provide. Communities with happy, satisfied residents will have a higher occupancy rate than the community with better amenities but poor service. This power lies with you, the On-Site Manager. The extra effort you put into your management style will be rewarded with not only less complaints, skips and delinquencies, but also in the longevity of a resident's tenancy and the recommendation to people just like them. Encourage referrals by utilizing some of the following:

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Organizations and nearby businesses are willing to help you rent dwellings because your success often contributes to their success, and vice versa. Visit or call them regularly. Whether fully occupied or not, every On-site Manager is expected to visit at least one business every week to provide posters, brochures, or business cards. Don't just post these on some bulletin board; instead, ask the person in charge for permission to display these in the employees' lunchroom! Contact:

- The local Chamber of Commerce
- Local employers' personnel offices
- College registrar/student affairs/student housing offices
- Hospitals

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Referral companies/real estate agencies earn a profit by either charging the prospect or the community for their services, typically an amount equal to one-half the monthly rent. This seems expensive, until you realize that they get paid *only if a rent occurs*. Whereas, with a classified, magazine, or other ad, even if no dwelling are rented, the community must still pay for the ad. Your Asset Manager will inform you if your community accepts referrals from agencies.

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Weekly Traffic Report helps to track the advertising media used, site signs, and referrals. To create the best marketing plan for the community, this information has to be accurately reported. We determine the most effective avenues to reach our new residents through tracking our office traffic sources.

- Applications should result from 50% of all visits to your community
- Applications should result from 10% of all telephone calls

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WEEKLY TRAFFIC REPORT

- Use this form to report the traffic generated by advertising, signage, or walk-ins.
- The On-Site Manager is to complete this report weekly and email it to your Asset Manager no later than Sunday evening along with the weekly Occupancy Report and Make Ready Report.

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RESIDENT RETENTION**THE SIGNS OF A HAPPY RESIDENT**

She is someone who smiles at you.



He speaks to you in pleasant tones, waves at you, calls you by name, and pays his rent on time.

She speaks on your behalf to refer new residents to your property.

He knows he can bring problems to you and they won't be received as a complaint, but as a valid problem which will be solved.

- Two or three times more money is spent attracting new residents when keeping the existing residents costs considerably less; "out of sight, out of mind" attitude overlooks the quiet resident that always pays their rent on time.
- Relationships are built on the dependability of both parties to meet certain expectations and fulfilling each end of the bargain is just part of the deal.
- Communicate in a positive manner; value complaints, listen to them, each complaint is an opportunity to establish and keep resident confidence and to build a reputation of reliance.
- Always schedule (1) hour orientation with a new resident; review the most important portions of the lease, resident handbook, conduct a walk through and appliance demonstration.

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TIMES YOU SHOULD THANK YOUR RESIDENTS

When they pay their rent.

When they compliment you, your community or company.

When they offer comments and suggestions, let them know you value their opinion.

When they simply refer a friend or associate, not just if the referral leases.

When they complain. Yes! Residents who tell you that they are unhappy are giving you a second chance.

When they turn in a service request. They are making your life a lot easier by letting you know what's bothering them.

Resident Appreciation Programs can be used in small or large communities. If you have a large community, you might want to try dividing your community into twelve sections and then each month hold a resident appreciation program for the buildings in that section. This allows you the opportunity of lowering the cost and time restraints of a one-time program.

Newsletters are often overlooked. Newsletters are a great way to stimulate a true community feeling. Newsletters do not have to be slick looking. A simple, typed one or two page informational sheet is sufficient. But, if you are so inclined, newsletters can be made to look very well done, and can be emailed to all your residents; if you acquire their email addresses. Keep it positive or they will not read it.

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COMMUNICATION can take several forms. Appearances of the community, the On-Site Management Team, and the rental center, coupled with body language and attitude, establish first impressions that turn into lasting impressions.

Verbal Communication

- Be friendly and natural; focus on the interest and needs of the applicant to build rapport and trust.
- Create a sense of urgency; "*This location is desirable, it will go fast!*"
- Do not promise security or use the words “safe”, “secure”, “peaceful”, or “quiet”.
- Avoid inserting or repeating certain words or phrases such as "*Oh.*"

IS YOUR COMMUNITY IN THE NEW MILLENNIUM?

<i>Yesterday</i>	<i>Today</i>
Complex	Community
Project	Property
Tenant	Resident
Unit	Home
Traffic	Future Residents
Office	Rental Center
Resident Manager	On-Site Manager
Work Order	Service Request
Office Parking	Future-Resident Parking
Rental Rate	Rental Value
Out Showing	Out Leasing or With a Future- Resident
Rec Room or Center	Community Clubhouse
Exercise Room	Fitness Center
Parties	Social Events
Security	Courtesy Officers or Patrol

Telephone Communication

- Try to answer the phone on the second ring; no more than three
- Do not put someone on hold without asking their permission first
 - 1) Tell the caller why you must put them on hold
 - 2) Ask them (don't tell them) if you can put them on hold
 - 3) Give them an option (ask to call them back)
 - 4) Wait for a reply

Example: *"I have to pull a file. Would you prefer to hold or should I call you back?"*
Wait for a reply before you hit that hold button!

- Give your first and last name; ask for your caller's first and last name.
- Use the caller's name at least three times throughout the conversation.
- Ask open, conversational questions to determine the caller's needs.
- Qualify the caller based upon the number of people living in the dwelling, the date and size of the dwelling needed and pets, if any.
- Enter information gathered on the guest card.
- Link the caller's needs with the community, surrounding area, and on-site management team.
- Do not discuss price unless asked; when mentioning price, recap all that is included in the rental value - amenities, utilities, community activities.
- Invite the caller to visit the community; ask for a specific appointment.
- Always get the caller's telephone number.

Reminder card can be copied and placed by your office telephone to assist you in achieving a consistent telephone presentation time after time.

TELEPHONE ETIQUETTE

Instead of:	This is better:
<i>"Let me ask you a question."</i>	<i>"May I ask you a question?" "Do you mind if I ask you some questions?"</i>
<i>"She isn't back from lunch yet."</i>	<i>"She's away from her desk, but I expect her soon."</i>
<i>"He's on his coffee break."</i>	<i>"He's away from his desk; how can I help you?"</i>
<i>"He's not here."</i>	<i>"He's unavailable at the moment. How can I help you?"</i>
<i>"I don't know, we don't handle that here."</i>	<i>"Sorry, I can't answer (or help you with) that, but let me refer you to someone who can help you."</i>

Guest Cards are a written method of obtaining information about the prospect.

- Use guest cards to record information from telephone calls or personal visits from prospects.
- The leasing person should complete the information; some On-Site Managers feel they have more control over the information they receive if they complete the guest card for the prospect.
- If all the information is not completed, make a second effort to obtain it prior to the prospect leaving the community; *"Mary, I'd like to keep in touch with you regarding apartment #12. May I please have your telephone number?"*; prospects who are resistant to give you information during the first four minutes of their visit may feel more confident in releasing information to you at the end of your presentation.
- Take the guest card and pen with you on the tour of the community and dwelling; the prospect may continue to give you important information and you need to be prepared to record it. Carry a binder; "What is in your lease kit?"
- Your primary goal is for a prospect to rent the dwelling during his or her first visit; if a prospect does not rent at that time, the guest card becomes a valuable follow-up tool.
- When you have no dwellings available, use guest cards to call prospects when you have an dwelling on notice.
- Keep guest cards for seven (7) years.

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GUEST CARD

- Use this form to record information about every rental prospect that has called or dropped by
- The prospect is to complete the front, and the on-site personnel is to complete the back
- Refer to guest cards for information that will assist you in making the prospect welcome by talking about their personal needs and wants
- Use guest cards to make follow-up calls

Follow-up with every visit, which should be made the same day by emailing a thank you or placing a telephone call to the prospect.

- Call within 36 hours and again within five (5) days; confirm an appointment or attempt to set an appointment
- Continue follow-up contact until the prospect rents or otherwise becomes disqualified
- Open the conversation by introducing yourself and the nature of the call:

On-Site Manager: *"Good afternoon, Lisa. This is Jeannie at Summer Meadows. Is this a convenient time for you to talk?"*

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PRESENTING THE PRODUCT includes the dwelling and its amenities, the community amenities, garage or carport, storage units, etc.

Telephone Presentation

- *Always remember* the caller doesn't know (or care) that you are in the middle of paperwork or that you just walked in from showing another dwelling, etc. Take a breath, collect your thoughts, *smile*, and then answer the call; always assume it is a prospective resident calling. Give the name of the community, and your name for familiarity on the part of the caller.
- ▶ *"Thank you for calling Summer Meadows, this is Jeannie; may I help you?"*
- ▶ *Key interests* should be solicited from the caller; find out the name of the person you are talking with, then use it later throughout the conversation. Try to touch on key interests they may mention, perhaps they work close by (very short commute time), or they have an interest in keeping fit (pool or exercise facility on-site), or if they enjoy the outdoors (park within walking distance), etc.
- ▶ *Prices, fees, etc.* should be discussed if the caller specifically requests the monthly rent, or asks if there are any fees/deposits. Certainly go over the details with them. However, if they don't ask, don't volunteer the information. They may want to spend a specific amount per month, but upon visiting your shining community, they might be willing to spend the extra to live there, just because of its convenient location, or they like the fitness room, or it has a great pool, or the layout of the dwelling is appealing, lots of storage, etc., etc., etc.
- ▶ *Personal touches* allow you to get familiar with the caller by asking a few initial questions just to help get acquainted. Most people like to talk about themselves.
 - ▼ *"What is causing you to look for a new home?" (WHY are you moving?)*
 - ▼ *"How did you hear about us?"*
 - ▼ *"Are you new to the area?"*
 - ▼ *"Do you work close by?"*
 - ▼ *"Will this be for you or more than yourself?"*
 - ▼ *"Have you ever visited our community before?"*

- ***Ask them to visit your community!*** Even if you are 100% occupied, you may get notices at any given time. Or, you may get a referral down the road from someone who was impressed with your community and mentioned it to a friend. You can let the prospect know that you cannot show them a specific dwelling, or you can show them yours; you can give them a tour, let them get a feel for the area, and to see how nice the residents are, the recreation facilities, etc. If they say they would like to come out, try to pin them down (somewhat) to a day and time, such as . . .
 - ▶ *"What day do you think you might be by? Would that be morning or afternoon? Before 10 or after?"*
- *another alternative*, if you are 100% occupied is to refer them to other Norris & Stevens, Inc. managed properties that are in the same general area or have the amenities the prospect is requesting.
- *in general* be helpful, enthusiastic, attentive, concentrate; just keep in mind you would like to have them join your community as residents!

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Greeting ▼ <i>Be cordial, enthused</i>	▶ Be Friendly - Stand to Greet - Shake Hands ▶ Introduce Yourself ▶ Ask Prospect's Name
Qualify ▼ <i>Discover needs and interests</i>	▶ Ask size of dwelling needed ▶ What is date of need? ▶ How many people are to occupy dwelling? ▶ Ask, "Do you have animals?" ▶ Ask special interest and requirements for the dwelling ▶ Ask place of employment and occupation
Demonstration ▼ <i>A time to build value</i>	▶ Tour all of the recreation areas prior to showing model/dwelling ▶ Tour the laundry, mail box area, trash bins, carports ▶ Discuss the area's shopping, recreation, conveniences ▶ Discuss the qualified residents living here ▶ Praise the immediate maintenance follow-up ▶ Praise the on-site professional staff ▶ Demonstrate the benefits of the dwelling

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Voicemail

- Want to have a lot of vacancies? Then have a message like this:

"You've reached Boring Bluffs. I'm not here, but leave your name and number at the tone."

- If you want to fill your vacancies and make yourself more money, then use a friendly, informative message that tells the caller what you have to offer and encourages them to come for a visit, something like this:

"Hi! This is Russell at Summer Meadows. I'm out helping one of our residents right now, but I'm sorry I missed you. If you're calling for information, our community has one and two bedrooms available, overlooking a forested stream, and yet convenient to downtown. If you'd like, please visit us at 829 South Riverview Road or leave your number - and your name - and I'll call as soon as I return. Thanks for calling!"

- Return your messages promptly; don't lose rental opportunities.

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Leasing Tools

- *Floor plans* - have them professionally drawn; include room dimensions and measurements.
- *Amenities and features* - list the common amenities as well as the "extras"
- *Site map* - this allows a bird's eye view of your entire community helping the prospect see where his dwelling is in relation to the property entrance, rental center, and other common amenities.
- *Neighborhood map* - give the prospect an idea of the location of schools, shopping, freeways, bus stops, etc.
- *Community data sheet* - include pertinent city information that include services, entertainment, and other positive facts and statistics.
- *Monthly make-ready sheet* - this is the list of dwellings that are ready and can be leased today!
- *Community brochure* - offer even when the prospect is not interested, they probably have friends!
- *Business card* - be sure they are current with your name neatly handwritten.
- *Current newsletter* - this can give the prospect a feeling of "home".
- *Tape measure* - so you can verify room and wall dimensions.
- *Rental applications/rental screening criteria* - always be prepared to close.

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In-Person Presentations can be considered "show and sell" sessions.

- Always stand when greeting a new prospect.
- Shake their hands.
- Introduce yourself.
- Ask for their name.

Be prepared to make the best presentation possible.

- Each and every morning check every vacancy, "to show" dwellings, and models, and all amenities on the tour route prior to demonstrating to an applicant; inspect for proper temperature, working lights, appropriate smells and include all amenities of the community en route.
- Encourage participation by the applicant; opening closet doors, turning on appliances.
- At this point the leasing agent must satisfy the prospect about the physical adaptability of the *community* and the *dwelling*, also consider the underlying *human desires* and *characteristics* of the prospect that cannot be satisfied by *appearance alone*.
- The prospect has seen the architecture, part of the overall layout, and his first impressions are at least somewhat favorable or he would not still be talking to the On-Site Manager. It is not safe to assume that the prospect is completely satisfied.
- Plan the route to and from the model, or particular dwelling, to point out the specifics about the community.
- It is equally important to get the prospect to talk by the use of well-directed questions that will give the On-Site Manager *clues* to the prospect's personality and lead to the discovery of characteristics and desires that the Leasing Agent will satisfy as he proceeds with the sale.
- The *attention element* will be reached quickly by the *cleanliness*, general *appearance* and *colors* of the dwelling; if there is a green carpet in the dwelling which is not going to harmonize with the furnishings of the prospect, it may not be possible to interest him, and create desire and action - but let's assume the cleanliness, appearance and color satisfy the prospect.
- The *interest element* will become apparent when the specific layout of the dwelling, including that of each room, and the functional equipment, have satisfied the prospect's needs and desires.
- The leasing agent must have a planned procedure - this procedure must include demonstrations that will translate *features*, which are cold facts, into benefits which will reach the prospect's *emotions*.

- The leasing agent must know the dwelling location and how to demonstrate it advantageously:
 - ▶ *"Close to pool - convenient for sunbathing and relaxation, or a healthy, refreshing swim".*
 - ▶ *"Away from pool - more privacy, and quiet yet easy access for sunbathing and relaxation or a healthy, refreshing swim".*
- The special features of each room should be evaluated and translated into benefits.

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MAKING THE SALE The decision to rent must, of course, be made by the prospect. The role of the On-Site Manager or leasing agent is to assist the prospect in making their decision. It must be a conscious, deliberate act on their part. It isn't enough to give a good tour and make a good presentation, we must get a commitment. We must sell!

- A "sale" is accomplished when the prospect has agreed to rent a dwelling AND has provided you with money to begin processing his application.
- To accomplish a sale, we must attempt to "close" the prospect, not once, but often!
- How do we know when to close? Words are usually the most reliable signals. Statements such as:
 - ▶ *"I think our bed would fit in this room."*
 - ▶ *"What do you think, dear?"*
 - ▶ *"We could put our TV here..."*
 - ▶ *"How much is the rent?"*
 - ▶ *"Supposing I do rent, will you..."*
 - ▶ *"When is it available?"*
 - ▶ *"I really should wait..."*
 - ▶ *"I wasn't planning to spend this much..."*

These are all clues that the prospect has been sold. Some people consider these last two comments to be objections - they aren't - they are a signal of interest. The prospect just didn't complete the sentence. If they did, they would say, *"I really should wait...but I guess I won't,"* or *"I wasn't planning to spend that much... but I guess I will."*

- When a signal is received from a prospect, by word or by action, that they are ready to rent, *then close! Right now!* Without delay! So we haven't shown them everything. So we have a little more things to discuss. We can always cover these at a later time. **CLOSE! NOW!**

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Overcoming Prospect's Objections is an everyday occurrence when renting dwelling - the rent is too high, or the master bedroom is too small, or the view's all wrong. There are three types of objections:

- Indecisive - also known as the "put off"; this is the most common objection and by far the easiest to classify; the prospect will often say, *"Well, let me think about it awhile and I'll let you know."*
- Genuine - this objection is a serious problem for the prospect which you must overcome if you are to rent an dwelling; for example, he might say, *"I want a washer and dryer hookup, and you don't have them."*
- Hopeless - these objections cannot be answered; for instance, *"Your rent is \$1,500 a month, but my income is only \$1,250 a month."*

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Never treat an objection lightly

- Treat an objection not as a "no", but as a "not yet"; objections are really signs of interest; if people weren't interested, they wouldn't waste their time; they'd just walk out the door.
- When prospects object, they're giving you a buying signal; take these steps for all objections - no matter what those objections are:
- Welcome the objection - objections are signs of interest, and indications of why prospects aren't buying. Respond positively. You might say: *"I'm glad you brought that up. It shows that you're really a step ahead of me."*
- Rephrase the objection - to make certain you understand the problem, restate the objection in your own words. That enables you to clarify the real concerns. You might say: *"Let me make sure I understand your problem. Is it the lack of closet space or the interior size of the dwelling that you feel is too small?"*
- Agree, at least in part - show empathy for prospects' objections. This builds rapport and shows that you're on their wavelength. You might say: *"I understand why you might feel that way. Others who live here also felt that way at first."*

- *Answer the objection briefly* - don't dwell on it or spend a lot of time solving the problem; as soon as you are sure that you have answered it, move on. Some objections should never be answered, especially the hopeless ones. Here, "silence is golden".
- *Explain the objection away* - if the objection is logical and you have an equally logical answer. For example, someone might object because the oven is not self-cleaning; you might answer, "*Self-cleaning ovens are nice. However, do you know how much energy is used to heat the oven to the high levels needed for self-cleaning? In an effort to hold down our Resident's utility bills, we've retained these appliances for their benefit.*"

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Never argue

- The rental prospect is a customer and no one has ever won an argument with a customer; avoid saying, "*Yes, but . . .*" Remember, an objection is an indication of interest; if the prospect isn't interested, he won't bother to voice an objection. The best possible time to close is after successfully answering an objection.

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When price is the problem

- Point out other advantages that might offset a high price. You might say: "*If you live here, will you have a shorter commute to work? Will you spend less on gas and maintenance?*"
- Emphasize value rather than price. You might say: "*We have a nice fitness center with jogging trails nearby.*"
- Minimize the price by reinforcing the features that meet the prospect's needs, and by calculating the extra dollars on a per-day basis. You might say: "*This dwelling has almost everything you're looking for, including the southern exposure for your plants - and it's only \$1.50 a day more. Isn't that worth it?*"
- Offer to throw in equivalents, like a pool pass, that will offset the higher rent; be sure to clear these with your Asset Manager first.

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When dwelling location is the problem

- Use the "boomerang" approach to reverse the objection by turning a negative into a positive selling point. For instance, if a prospect wants a dwelling overlooking the pool, you might say: *"I agree that a view of the pool is nice. But those locations tend to be noisy, and you mentioned that peace and quiet are very important to you."*

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When features are a problem

- Offer alternative solutions. If a closet isn't big enough, look for ways to use the space more effectively. You might say: *"I agree that this closet may look small. But if we install a closet organizer, we can double the amount of space."*
- Describe how a satisfied resident solved the problem. You might say: *"I understand that the carpet isn't going to match your color scheme. But I've seen so many people in this community do wonderful things with area rugs."*
- Treat problems boldly by pointing them out yourself and showing them in a new light. You might say: *"A lot of forethought went into designing this dwelling. Most of the usable area is in the living room, where you spend most of your time. The designers economized on space where they believed it not so important, like the bedroom."* Other examples:
 - ▶ Small bedrooms: easy to clean and gives you larger living area where you spend your time.
 - ▶ Kitchen: the cupboards and drawer space should be demonstrated by opening and closing and by pointing out space and quietness, magnetic stops, etc.
 - ▶ Refrigerator: large-size freezing compartment for storing reserve food supply and provides an opportunity to buy at bargain prices.
 - ▶ Construction benefits must not be overlooked.
 - ▶ For example, sound conditioning cannot be seen; it must be described, especially in terms of privacy.

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Plan ahead to have answers ready

- Prepare a list of your community's most saleable features, such as tennis courts, ceiling fans, fitness rooms. Decide how much extra rent they'd be worth to a prospect.
- Visit your competition frequently, be familiar with their properties and selling strategies, and know their strengths and weaknesses; know how you stack up against the competition, and be able to sell against them; never degrade your competitors; talk strictly facts.

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Closing can be initiated in different ways with different methods to secure the sale. Use the one that feels "right" to you, but close!

- Summarize the benefits of renting and living at your community.
- Invite the future resident to complete an application.
- Distribute a brochure and literature at the **END** of your presentation; make notes on the materials that relate to the future resident's specific needs.
- Remember, the close begins the moment we begin talking to a prospect either by phone or in person. If we have done a good job of getting to know the prospect and their needs, of describing our community's features and benefits and of solving the areas where we are lacking, the close is a mere formality. If everything else is done right, the close is almost automatic.
- If the prospect doesn't rent, don't pressure but don't give up. There's a reason they're hesitating. *Find out why.*
- Prospects don't always blurt out comments about their reactions toward you or the community. More often, their comments are responses to our questions. ASK! ASK! ASK! Without questions, it is very difficult to measure the interest of many prospects. Ask them indicator questions:
 - ▶ *"How does this dwelling compare to others you've already looked at?"*
 - ▶ *"What's your first reaction?"*
 - ▶ *"How do you like it?"*
 - ▶ *"Will your furniture fit in this plan?"*

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TIPS ON CONDUCTING BETTER CLOSES

Be positive - assume the prospect will rent.

Give prospects a choice - don't ask whether they want to rent or not - ask which dwelling they want to rent.

Ask double questions - *"Do you want the one-bedroom or two-bedroom dwelling?" "Do you want to move in on the first or the fifteenth of next month?"*

Spell prospects' names - when you are ready to close, ask for the prospect to spell their name; if they respond positively, they are certain to rent.

Appeal to pride - *"Imagine how proud you would be for your guests to visit you here."*

Use a future date - *"Suppose we have the dwelling prepared for you to move in on the first of the month?"*

One more thing - as a last resort say *"Oh, there is one more thing I forgot to mention"* - this is particularly good after a couple has left the rental center and hesitates at the car obviously discussing the dwelling.

Something special - *"It will take me seven days to get this dwelling in the condition I would like for you, but I want to make sure we do a good job."*

Ask for what you want - you want them to rent; what's wrong with asking them to rent now?

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RESERVING DWELLINGS

- A dwelling cannot be held vacant for more than (10) days. A move-in Reservation Deposit should be collected upon Applicant approval.
- Charge a *reservation* deposit, when appropriate, and record properly as pre-paid rent in Skyline
- Clearly explain the reservation deposit will apply towards rent when the rental agreement is signed.
- Clearly explain the reservation deposit *will be* forfeited if the rental agreement is not entered into within 10 days
- Applicants that have had their reservation deposit forfeited, can complete a rental agreement, if a dwelling is available, if they agree to sign a rental agreement and start paying rent immediately, otherwise their application is considered *denied/withdrawn*.

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RESERVATION DEPOSIT

- Use this form when the applicant(s) wishes to reserve (hold) a dwelling; this serves as an agreement, receipt, and instructions if the applicant(s) sign or fail to sign the rental agreement.
- The On-Site Manager can find a copy in Docs Box under the dwelling the person will be renting or in the Training Documents section under Move-In and Deposits. Give the applicant a copy, fill out the reservation deposit addendum so Docs Box will calculate the Move-In Accounting correctly, upload a copy with the MI Packet and file with the MI Packet in the resident's file.

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WHEN NO DWELLINGS ARE AVAILABLE

- Complete a guest card, ask how they heard about the community for the weekly traffic report.
- Attempt to refer the prospect to another N&S managed property.
- Explore every possible alternative with the prospect that might make it possible for him to live at your community.
- 100% leased is no excuse not to market your community.

Waiting Lists

- Never get too comfortable with your high occupancy.
- Every telephone inquiry must be worked as though you have many available dwellings; get prospects to the property.
- When you have notices but not vacancies, sell those notices and describe the floor plan and location to the prospect over the phone; encourage them to set an appointment to visit and post a 24 hour notice to enter the dwelling to be shown, providing you have already done your pre move-out inspection, and the dwelling is presentable.
- Even if you have absolutely nothing to show and no dwellings on notice, *invite all telephone prospects out to visit the community* and be placed on the waiting list.
- Give all prospects the full treatment even if you have no available dwellings to show; completely qualify the prospect and give a tour of the community.
- Make a follow-up appointment to show a dwelling that will be available in the near future.

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UNDERSTANDING FAIR HOUSING LAWS is essential for all property management personnel. The federal protected classes are: race, color, national origin, religion, gender, familial status, and disability status. The state of Oregon has additional protected classes: marital status, and source of income, sexual orientation and victims of domestic violence.

- Post the HUD Fair Housing Poster
- Avoid questions and answers that reference a protected class.
- Do not use words or phrases such as: singles, adult, married, children, no play area, not good for children, woman, gentleman, ideal for two people, mature persons, mentally ill, crippled, retarded, blind, deaf, adult building, or restricted community.
- It is illegal to discriminate against a disabled individual, as well as anyone associated with that person.
- A disabled individual may request *reasonable modifications* to the dwelling or common areas which the management cannot refuse; *reasonable accommodations* also apply to rules, policies, practices or services if necessary for the disabled person to use the housing.
- A community with a "no pet" policy must allow a disabled individual an assistance animal.
- The statute of limitations for violations to the fair housing law is two (2) years from the date of discovery; penalty for the first offense is \$10,000 which does not include punitive damages.

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FEDERAL FAIR HOUSING LAW

- Place framed poster on a prominent wall in the rental center.

Protected Classes have become part of the Federal and State Civil Rights Law as well as several city ordinances. Regardless of where the community is located, there will be no discrimination on the basis of *any* protected class.

Federal

- Race.
- Color.
- National Origin - the applicants inability to speak English is not a reason to deny or avoid accepting or processing an application.
- Gender.
- Religion.
- Familial status - includes a parent or another person that has legal custody of individual(s) under eighteen (18) years of age; a person that has custody of an individual under eighteen (18) with the permission of the parent or guardian; a pregnant woman; or a person in the process of securing legal custody of an individual under the age of eighteen (18).
- Disability status - includes any person that has a physical or mental impairment which substantially limits one or more of such person's major life activities (walking, seeing, hearing, speaking, breathing, learning, working, caring for one's self, and performing manual tasks), a record of such an impairment or a person being regarded as having such an impairment; this does not include current users or addicts of a controlled substance, but it does include an addict who has recovered from an addiction or is participating in a self-help group; individuals with AIDS or the HIV virus are also listed as protected and the disclosure of those with the disease or who have died from the disease is also prohibited.

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State of Oregon

- Source of Income - this includes the means by which a person supports themselves and their dependents; this includes money from an occupation, profession or agreement, from federal or state payments such as welfare, social security, disability, court-ordered payments such as child support or alimony, gifts, annuities, life insurance policies, compensation for illness or injury such as worker's compensation; however, money derived in a manner that is illegal or criminal by any law, statute, or ordinance (such as drug manufacturing and/or delivery, prostitution, gambling) is excluded.
- Marital Status - protects married and single/unmarried individuals of the same or opposite sex.
- Sexual Orientation - applies to the actual or supposed male or female homosexuality, heterosexuality or bisexuality.
- Domestic Violence Victims

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City of Portland

- Age - allowed discrimination is where the property meets the requirements of "housing for older persons"; individuals under the age of 18 whether emancipated and/or married, are not protected but can be held to the rental contract if the community does offer an rental agreement.
- Type of Occupation

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City of Eugene

- Age
- Ethnicity
- Domestic Partnership

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City of Corvallis

- Age
- Type of Occupation
- Sexual orientation
- Condition of pregnancy - is covered under the federal familial status.
- Educational association - provides protection for students and the school they are affiliated with (professors and teachers are included under source of income).

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City of Salem

- Age
- Domestic Partnership

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Housing for Older Persons includes properties that qualify to exclude children by having 100% of its residents 62-years of age or older, or where at least 80% of the dwellings are occupied by at least one person 55-years of age or older, and there are services designed specifically for their physical and social needs.

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DISCRIMINATION is defined as "to select". Obviously, there is "allowable" discrimination procedures, but there are also illegal discrimination procedures. When selecting applicants in a landlord/tenant relationship, all applicants must be treated equally without any favoritism or dislike. Discrimination, per the regulations, is not only the act, but the intent, the pattern, as well as the effect. If what you do or say has a negative affect on a "protected class", then the act or communication is discriminatory.

Open discrimination usually appears as:

- The refusal to show or rent to a "protected class".
- Charging higher fees, deposits or rent to a person(s) of a "protected class".

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Subtle discrimination usually appears as:

- Showing less desirable dwellings.
- Showing a dwelling at a disadvantage (not cleaned, painted, or turnover maintenance was not completed).
- Coding applications with a preference given to a person that is not of a protected class.
- Applying different standards of income or deposits.
- Asking how many children will be living in the dwelling, or if a couple is married.
- Requiring disabled individuals to provide information regarding case workers or medication.

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STAYING OUT OF TROUBLE

- ▶ Give applications to all requesting applicants.
- ▶ Do not quote policy or rental criteria over the phone.
- ▶ Handle each application as it is received.
- ▶ **Time and date each application.**
- ▶ **Follow the policy of first application received, first to be processed.**

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OCCUPANCY STANDARDS were defined in the Residential Landlord and Tenant Act which took effect September 29, 1991. The ORS 90.262 statute states the landlord may adopt the guideline for a dwelling which "shall not be more restrictive than two people per *bedroom* and shall be *reasonable*".

- Display the "Occupancy Guidelines" poster in the rental center.
- Occupancy standards should refer to "people", not "adult" and "children"; any attempt to restrict the number of children, or to prohibit young children of opposite sexes from sharing a bedroom is in or by itself unreasonable; the number of adults can be limited to two per bedroom.

Definition of a bedroom is a habitable room (per building codes this means a space used for living, sleeping, eating or cooking - bathrooms, closets, halls, storage areas are not included) that:

- Is intended to be used primarily for sleeping purposes.
- Contains at least 70-square feet, and is configured so as to take the need for a fire exit into account.

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OCCUPANCY GUIDELINES

- Use these guidelines by placing the poster in a prominent location in the rental center for all applicants to see.
- Display the poster in a frame grouped with the other application posters; replace as necessary to keep current and to maintain its appearance.

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QUALIFYING THE APPLICANT begins with your first contact either by phone or in person. As you are sizing up your visitor, they are sizing up you and the product you are selling.

Telephone Calls

- Do not quote rental or screening policies; the ability to say the same things to every caller in the same manner is impossible, and unfortunately this action could be viewed as discriminatory.
- Instead, ask qualifying questions that help to pre-screen.
 - ▶ *How many will be occupying the dwelling?*
 - ▶ *When do you need the dwelling?*
 - ▶ *Do you have any animals?*
 - ▶ *How many vehicles do you have?*
- Avoid giving too much information about the dwelling and community; you want to stimulate an interest and encourage a visit by the caller; *"When would you like to visit?"*

* * *

Visits

- Request the visitor complete a guest card, or complete it for them while you are asking other qualifying questions that will help you in the screening process.
- Make it a policy to meet all the applicants during the screening process; *always* before approving the application.
- Always make written note of inappropriate or violent behavior during the visit, interview, or screening process; this in itself may be reason for denial of the application.

* * *

APPLICATION SCREENING PROCESS is explained to each applicant by attaching a letter to the rental application and displaying the Norris & Stevens poster "What is the Application Process?" Questions regarding the screening criteria are not to be answered verbally - each applicant is to receive this informational letter so as to assist in preventing misunderstandings or other communication that an applicant would feel to be discriminatory based upon a protected class.

- Display all screening criteria posters on a prominent wall in the rental center.
- Attach a copy of the screening criteria to each rental application.
- The Fair Credit Reporting Act states an applicant must be aware that he/she is going to be screened and that they give their permission (this is done by signing the application).
- All persons that wish to submit an application, are encouraged to do so.
 - ▶ Do not ignore the prospect.
 - ▶ Do not refuse an application.
 - ▶ Do not tell someone not to apply, or flatly refuse to rent to them.
 - ▶ Do not quote them higher rent, fees and/or deposits.
 - ▶ Do not show them less desirable dwellings.
 - ▶ Do not pre-screen an applicant for income, credit history, or references.
- Process all applications on a first come/first serve basis.
- All applications are to be processed - *do not* deny an application without performing the complete screening process (the only pre-qualifying allowed is based upon: animals, date dwelling is wanted, size of dwelling, and number of people in the household).
- *Document everything* by using guest cards.
 - ▶ What dwellings were shown.
 - ▶ What follow-up was made.
 - ▶ What credit procedure was followed.
 - ▶ Maintain records in an organized, retrievable manner.
- An applicant should be prepared to wait seven (7) days (credit and rental histories, and income verifications can take this long).

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Why Screen Applicants? The goal of the resident selection process is to select residents who are likely to pay their rent on time, respect the property, remain for a relatively long period of time, and enjoy living at the community.

- When screening an applicant, there are four general items of interest:
 1. What is the applicant's past rental history?
 2. What kind of a resident were they?
 3. In what condition did they leave their last place of residence?
 4. Are they capable of paying the rent?
- Properly conducted applicant screening provides a system by which illegal activity, such as criminal activity, can be detected and screened out.
- Learn the warning signs of dishonest applicants.
- Reinforce the message to all applicants (and residents) that you are an active manager, committed to providing honest residents with good housing and keeping dishonest residents out. This starts by requiring a complete application and verifying identity.
- To be effective, you must complete all the steps in the screening process; don't cut corners; don't believe a scam cannot happen to you; don't trust an innocent-looking face, and don't accept applicants just because your "gut" says they are okay.
- To avoid possible discrimination complaints, always apply the screening policies and procedures *equally to every applicant*.
- Maintain resident files for seven (7) years.
- Mail all original denied and withdrawn applications to Norris & Stevens.

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WHAT IS THE APPLICATION PROCESS?

- Use these guidelines by placing the poster in a prominent location in the rental center for all applicants to see.
- Display the poster in a frame grouped with the other application posters; replace as necessary to keep current and to maintain its appearance.

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Rental Application procedures are the same for all Norris & Stevens managed communities.

- Provide applications to all prospects wishing to apply for a dwelling at your community; this means you give all prospects an application if they request one.
- *Do Not* prescreen the applicant (permissible qualifiers include the number of occupants, the size of the dwelling needed, whether or not they have pets, and when they need the dwelling - leave all other qualifying to the screening service.)
- A written application and application fee is required from each applicant eighteen (18) years of age or older; use the Application for Rental.
- Each applicant is required to complete and sign the application.
- Have the applicant(s) *print* the information needed; be sure the application is complete, with no blank lines; and a full two (2) years residence history. Each person must sign the application before credit, housing, or income information can be requested.
 - ▶ Verify legal name spelling, social security numbers, zip codes, phone numbers, and emails. Match the information on the application with the supporting documentation.

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APPLICATION FOR RENTAL

- Use this application for all prospects applying for a dwelling at your community; give all prospects an application if they request one.
- Each individual, eighteen (18) years of age or older must complete a separate application.

Co-Signers

- Co-Signers are not accepted by Norris & Stevens; check with your Asset Manager for a possible exception.

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Roommates/Co-Applicants

- Write "roommates/co-applicant(s)" name in box five (5) of each application form (if more than one).

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Applicant Screening Disclosure is required when an applicant screening fee is collected. The purpose of the disclosure is to inform the applicant of the purpose and source of the information required to process their application.

- Provide a disclosure with every application.
- Provide the disclosure to all applicants.
- More than one (1) applicant may be included on one (1) disclosure form.
- Use the information at the top of the disclosure to follow-up on applications (name, address, and telephone number).

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APPLICANT SCREENING DISCLOSURE

- Use this disclosure to inform the applicant(s) of the screening procedure, fee amount, and property specific information.

HAVE ALL APPLICANTS PROVIDE A COPY OF EACH APPLICANT'S SOCIAL SECURITY CARD AND GOVERNMENT ISSUED, PHOTO IDENTIFICATION AT THE TIME OF APPLICATION. RETAIN ON FILE FOR THE MOVE-IN PACKET.

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Applicant Screening

- The definition of an "applicant screening fee" is:
 - ▶ It is a *non-refundable* payment of money charged by a landlord to a prospective resident or applicant prior to entering into a rental agreement for a dwelling for the purpose of which is to process an application for a rental agreement.
- Collect *the appropriate* \$50 fee(s) from all applicants (roommates/co-applicants) *before* processing any portion of the application information.
- Charge a separate fee for each application for rental.
- Get approval from your Asset Manager, for any special requests including screening fees, or specials when transferring within the property or to another Norris & Stevens property
- Cash is accepted only to secure the application. Money Orders are the best form of payment.
- *Always* write a separate receipt for each application screening fee received; indicate on the receipt "non-refundable applicant screening fee" (you may wish to purchase an ink stamp for this purpose).
- All fees must be deposited; *do not* hold deposits waiting for approval or for additional fees to be paid, etc. If you accepted cash, go buy a money order with petty cash and deposit it immediately.

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MAKING A DECISION

Accepted Application includes those applicants that have met all the criteria without exception and all applicant screening fees have been paid. Rental Screening will notify you via email with a decision regarding the application.

- The rental agreement is offered for signature and request is made for all deposits (if any) and rent to be paid.
- The move-in date is when rent starts, unless other arrangements are necessary or have been made (such as the availability of the dwelling).

* * *

Conditionally Acceptable Application is one that includes an allowable exception to some area of the screening criteria (usually credit or rental history).

- The applicant is offered the opportunity to rent by securing the dwelling with the payment of an additional deposit.
- Give conditionally accepted applicants a copy of the Adverse Action Notice to show why they are conditionally accepted.

* * *

Additional deposit requirement

- ▶ collect a deposit equal to a month's rent *in addition* to any existing deposit requirements; *do not* explain this as "last month's rent"; Norris & Stevens does not charge last month's rent.
- ▶ call the requirement a "security deposit" and process accordingly.

* * *

Denied Application means the applicant has not met the screening criteria, or otherwise qualified under the "conditionally accepted" exceptions allowed.

- Display the What Do I Do If My Application Is Denied prominently in the rental center.
- Call the applicant upon determining their application has been denied; follow-up the phone call with the Adverse Action Notice; accentuate the positive even when saying "no" to an applicant; state "you do not meet our published policies".
 - ▶ "Information provided in the screening of your application indicates you do not meet our criteria" is better than "we found in our verification process that your children don't follow the rules where you are currently living".

* * *

WHAT DO I DO IF MY APPLICATION IS DENIED?

- Use these guidelines to explain the appeal process available to the applicant(s) if they are denied.
- Place the framed poster in a prominent location in the rental center grouped with the other application posters for all applicants to see.
- Replace as necessary to keep current and to maintain its appearance.

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Disputes

- If applicant wants to submit additional information that may change the decision, let Rental Screening Services know and send them any updated information provided.

Adverse Action Notice

- Should state the general area in which an applicant is denied, so the applicant is informed.
- On-site management personnel should not discuss the denial in any more detail than the notice discloses; further questions by the applicant should be directed to the Asset Manager, Trans Union LLC., or Equal Housing Department of Norris & Stevens.

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ADVERSE ACTION

- Use the Adverse Action Notice to inform applicants of the items that led to the decision.

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HOLDING DWELLINGS should not be for any period longer than absolutely necessary. In no case should a dwelling be held longer than fourteen (14) days, and only when a *reservation deposit* has been collected to secure the execution of a rental agreement.

- Reservation Deposits are required within 72 hours of approval to hold the dwelling.

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Reservation Deposit can be charged after an applicant has been approved, and before the rental agreement is signed to hold a dwelling.



- A reservation deposit is *non-refundable and is not* considered a security deposit.
- The point in time that a deposit is required is (3) days / 72 hours from approval.
- The amount of the deposit is determined by the Asset Manager and is consistent from applicant to applicant until changed. It is generally \$200.00.
- The reservation deposit must be properly receipted and recorded as open credits in the "Rent" category of Skyline.
- If the applicant signs a rental agreement within the allowed fourteen (14) day *holding* time, the reservation deposit will be applied towards the first month's rent.
- If the applicant fails to sign a rental agreement within the allowed fourteen (14) days, the *reservation deposit* will be forfeited. This is because the reservation deposit assures your property will at least be partially compensated for the time you pulled the dwelling off the Market.
- If the property is unable to prepare the dwelling on the agreed upon time, the reservation deposit should be returned to the applicant.

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RESERVATION DEPOSIT

- Use this form when the applicant(s) wishes to reserve (hold) a dwelling; this serves as an agreement, receipt, and instructions if the applicant(s) sign or fail to sign the rental agreement.

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WAITING LISTS are created after applicants have been determined eligible, but no dwellings are immediately available.

- Display the What If I Want To Be Put On A Waiting List?
- Treat all persons on the Waiting List equally and communicate regularly. Speak to your Asset Manager on how to properly maintain the Waiting List.
- Only "approved" applications should be placed on the waiting list.
- An applicant cannot be charged a *non-refundable* fee (or a deposit that would be forfeited if the applicant withdraws their application) to be placed on a waiting list.

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WHAT IF I WANT TO BE PUT ON A WAITING LIST?

- Use these guidelines to explain to the applicant(s) how they can be placed on a waiting list.
- Place the framed poster in a prominent location in the rental center grouped with the other application posters for all applicants to see.
- Replace as necessary to keep current and to maintain its appearance.

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PRIOR TO MOVE-IN always qualify the applicants by thoroughly screening their rental application.

- Collect all applicable applicant screening fees. \$50 per person, eighteen (18) years of age or older.
- Notify the applicant of approval; determine move-in date.
- Conduct the final inspection of the desired dwelling; catch any previously unnoticed items such as cobwebs, poor cleaning, abandoned items, inoperable smoke detectors, and to ensure all maintenance personnel and/or vendors have finished their work in an acceptable manner; be sure to turn the circuit breaker on for the water heater.
- Complete the Check In/Out & Final Accounting of desired dwelling; leave on kitchen counter.
- Schedule the rental agreement signing appointment.
- Complete the rental agreement and any necessary addendums; assemble resident move-in packet.

* * *

Transfers within the community or from other Norris & Stevens managed community helps to maintain good residents, and reduce outside marketing efforts. All transfers must be approved by the Asset Manager, and treated as a complete move-out from the present dwelling, and as a new move-in. A new updated application is to be obtained with new copies of photo I.D. etc...

Within community

- ▶ Require a 30-Day Notice and begin process to approve the transfer.
- ▶ Inspect the dwelling, that the resident is transferring from *before* approving the transfer. (Pre-move-out inspection)
- ▶ Review resident's rental history; ensure there is no outstanding balance.
- ▶ Update resident's financial information; charge applicant screening fee unless waived by your Asset Manager.
- ▶ Accept an applicant screening fee and application for any new persons to be added to the rental agreement; stay informed, a denial of a roommate's application may mean the transfer will not be needed or approved.
- ▶ Process move-in as usual by creating a new rental agreement for the dwelling being moved into.
- ▶ Process move-out as usual for the dwelling being vacated; submit the usual move-out paperwork to Norris & Stevens move-out department by emailing move-out@norris-stevens.com
- ▶ Security Deposits, if any, will be refunded after charges, are deducted per Check In/Out and Final Accounting for dwelling that was vacated within 30-days of the move-out.

- ▶ Charge fees and/or deposits per community policy and Asset Manager.
- ▶ Create and execute new rental agreement for the new dwelling.
- ▶ Process move-in as usual; by uploading move-in submittal packet within five (5) days of transfer date.

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From another Norris & Stevens managed community

- ▶ Charge applicant screening fee unless waived by Asset Manager.
- ▶ Process application as a new resident move-in.
- ▶ Complete the rental agreement and move-in as usual.
- ▶ Charge deposits and/or fees, if any.

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MOVE-IN PROCEDURES

After the Application is Approved

- *Determine the actual move-in day* and the required monies necessary prior to move-in and schedule an appointment for signing the rental agreement prior to move-in.
- *Give the resident their copy of the "Rules and Regulations for Better Living" handbook*; review and discuss the important issues before you request the resident sign they have "read and understand" the handbook. This can also be done at the lease signing meeting.
- *Inform the new resident of the "no cash" policy* and the requirement that the first month's rent, deposits, and/or fees (if any) are to be paid by money order, personal check or cashier's check (guaranteed funds). Third party checks are generally not accepted.

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At the Lease Signing Meeting

- *Review the rental agreement/lease* and all additional addendums with the new resident at the lease signing meeting, acknowledging their responsibilities; obtain their signatures where necessary; give the resident their copy.
- *Issue parking assignments* or stickers, if applicable.
- *Discuss the move-in packet* which includes "How to Recycle" and other information useful to the new resident.
- *Call the utility company* in the resident's presence changing the billing; give the resident their new address. This should always be done prior to handing over possession of the dwelling to the resident.
- *Collect all monies for deposits, fees, dwelling rent, garage rent, and storage rent*, and write the appropriate receipts; never issue dwelling, mailbox, or laundry room keys before monies are collected.
- At least one (1) hour of undivided attention is usually required to cover all necessary items and to give new resident time for questions.
- Inform new resident of total monies due; full or prorated first month's rent, deposits, and fees, and the responsibility to provide the utility account number.

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Just Prior to Move-In

- Conduct a walk through of the dwelling explaining the proper use of the appliances, fireplace, or other amenities provided such as cable connection.
- *Confirm all the smoke detectors are in working order* in the resident's presence, if applicable; verify warning stickers are dated and initialed on each.
- *Obtain* their signature on the Smoke Detector Addendum and the Check In/Out Final Accounting.
- *Review the Check In/Out and Final Accounting* with the new resident, adding any missed items, and obtain signatures where necessary.
- *Inform the new resident of all move-in costs and their responsibility to provide the electrical utility account number and telephone number.*
- *Make the final arrangements for move-in day.*
- *Issue the appropriate keys*, if all deposits, fees, and/or rent has been collected, and give residents copies of all paperwork signed and/or initialed.

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Delivery of Possession occurs when the landlord gives actual notice to the resident that the resident has the right under the rental agreement to occupy the dwelling to the exclusion of all others.

- Actual notice includes the delivery of dwelling keys to the resident.
- All funds should be collected.

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Submittal Documents

- Assemble and upload move-in packet into Docs Box within five (5) days.

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Organize the "Resident File"

- Include a copy of every item submitted to Norris & Stevens in the file folder labeled "Resident File" and Docs Box.

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RENTAL AGREEMENT:

- Use this agreement for month-to-month Rental Agreements or Leases.
- The On-Site Manager, Assistant Manager, or Leasing Agent is to complete this agreement. The On-Site Manager must review and sign page 3, line 18 of the Rental Agreement (Real Estate Broker)
- All resident(s) (including all roommates) if applicable, must sign the rental agreement.

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RENTAL AGREEMENT:

- **Rules and Regulations:** all resident(s) must initial each page of the rental agreement accepting the preprinted rules and regulations.

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Pets are defined as dogs, cats, birds, ferrets, rabbits, snakes, iguanas, gerbils, rats, hamsters or other rodents or reptiles of any sort, exclusive of assistance/aid animals. Your community may or may not accept any pet, or may restrict the type of acceptable pets. All pets allowed must meet certain requirements, and be covered by a separate Pet Addendum. Deposits and/or additional security deposit for pets is to be charged when accepting a pet. Check with your Asset Manager about the specific requirements and restrictions that your community may have regarding the various types of pets.

- Assistance/aid animals or prescription pets cannot be refused for disabled applicants or residents. See the Fair Housing section on reasonable accommodations.

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Visiting pets are not allowed under any circumstances.

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Aid animals are defined under fair housing laws, such animals are regarded as tools to aid individuals with disabilities. The animal may be a trained service animal or may be a companion or therapy animal recommended for a mental or emotional disability. We have the right to ensure that the animal is necessary for the disability so we require a written verification from the medical or mental health provider treating the individual. We also require licensing and vaccinations for assistance animals to the same extent that the same is required by local law for

domestic animals. As landlords, we may not apply size, weight, or breed restrictions to an assistance animal. It is possible that a resident will request an accommodation for more than one animal. In this case, we can request verification that each animal is performing a different specific function. Norris & Stevens requires residents with an assistance animal to sign an assistance animal agreement to emphasize that the resident is responsible for the animal's care and waste pickup and that the animal must not disturb other residents or damage property.

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Pet Rent may be charged at communities that allow pets. This rent is not to be considered payment to cover or apply to cleanup costs or pet damage. Pet rent is set by the Asset Manager with market conditions as a consideration.

- Pet rent cannot be charged for assistance/aid animals.

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Pet deposits may be charged at communities that allow pets. If a deposit is charged, it will be included as an additional security deposit. If pets are allowed, the pet deposits are set by the Asset Manager with market conditions as a consideration.

- Pet deposits cannot be charged for assistance/aid animals.

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PET/AID ANIMAL ADDENDUM

- Use this addendum when the resident(s) has a pet, and pets are permitted in the community or the resident(s) requires an assistance animal/prescription pet.

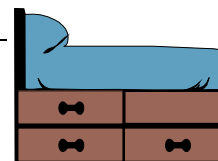
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- **Waterbeds** are allowed only at the discretion of your Asset Manager and with proof of insurance provided by the resident. Resident(s) must agree to assume all liability for any damage occurring from or relating to the use of the waterbed. Waterbeds should be drained into the bath tub, not onto the grounds.

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WATERBED ADDENDUM

- Use this agreement for resident(s) with waterbeds.



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- **Garages and Carports** may be available at some communities. In some cases, the garages or carports are included in the monthly rent, in others garages or carports are optional, covered under a separate rental agreement with an additional rental amount. Deposits may be charged as part of the Garage Agreement.



- Garages are never to be used as storage areas; many communities have limited parking and the garages should be considered a parking space for one of the residents vehicles; storage of items are permissible as long as a vehicle can be parked inside.
 - ▶ Toxic or flammable materials may not be stored within the garage at any time; this includes gasoline, paint/lacquer thinners, cleaning solvents, and lighter fluids.
 - ▶ Garages are never to be used as work areas; business operations including mechanical repairs or woodworking, are not appropriate for the community or the use of the garage; minor, personal mechanical repairs are not to be completed in the parking areas and will only be permitted in garages at the discretion of the Asset Manager.
 - ▶ Residents shall not use their garage for illegal activity, such as storing stolen property or the manufacturing of drugs; report illegal activity to the authorities immediately; discuss the termination of the garage agreement and rental agreement with the Asset Manager.
- Garage rent is due on the first; residents failing to make timely monthly payments will be assessed a late fee.
- Residents failing to pay timely monthly rent will be issued a 72-hour notice; discuss with your Asset Manager what action should be taken if rent is not paid after the expiration of the 72-hour notice.
- Residents must give a 30-day notice to terminate garage agreements.

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GARAGE/CARPORT RENTAL AGREEMENT

- Use this agreement when the garage or carport is not included with the dwelling.

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Storage Units may or may not be included with the dwelling and covered under the rental agreement. If the units are rented separately, a storage rental agreement must be completed and signed.

STORAGE RENTAL AGREEMENT

- Use this agreement when the storage unit is not included with the dwelling.

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DWELLING INSPECTION will determine the condition of the dwelling at the beginning of a new tenancy, when a new property has been acquired, or during tenancy when no inspection report exists.

- After the final turnover inspection has been completed and prior to move-in, a Check In/Out & Final Accounting should be completed.
- Inspection reports at move-in verifies the condition of the dwelling when the landlord turned over possession to the resident and the condition in which the resident accepted the dwelling.
- Complete the Check In/Out & Final Accounting by using *New*, *Almost New* (less than 1 year old), *Acceptable* (older than 1 year), *Deficiency Note*, and *Does Not Apply*.
 - *New* means the item has been replaced with the last turnover.
 - *Almost New* means the item has been replaced within the last twelve (12) months.
 - *Acceptable* means the item is older than one (1) year, in good condition, repaired to an acceptable condition, or damaged but not a habitability concern.
 - *Deficiency Note* is defined as any item missing, broken, or otherwise inoperable or damaged. For all deficient items, enter the relating item number under the summary section with a brief description of deficiency. Make clear the condition of drapes and carpets that are clean but worn and/or stained; of window screens that have small holes or are bowed; that the woodwork has been splattered or covered with paint; that poor patches have been made in ceilings or walls; the presence of chips in sinks and tubs; scratches, nicks or stains that are on countertops.

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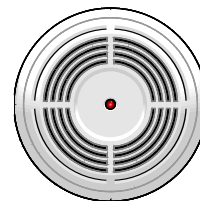
CHECK IN/OUT & FINAL ACCOUNTING**Move-In Inspection**

- Use this form to verify the condition of the dwelling after the final turnover inspection, but prior to move-in.

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SMOKE / CARBON MONOXIDE DETECTORS are to be installed and working in every dwelling. Communities in Portland or those that house subsidized residents must provide a smoke detector on each floor, including basements. Although we take great care to ensure the safety of our residents by providing operable smoke detectors, they are sometimes their own worst enemy. Residents need to understand the severity of a fire hazard and their responsibilities as residents, so we must provide them with instruction and acceptance of responsibility forms.

- Always have the correct number of smoke detectors installed in every dwelling.
- Upon every visit to the dwelling, test the smoke detector and note the file.
- At move-in, confirm all battery/electric smoke detectors are in working condition.
- When fresh batteries are installed, place warning sticker on unit; date and initial sticker.
- Obtain resident(s)'s signature(s) on Check In/Out & Final Accounting.
- Have all new residents sign the Smoke Detector Addendum.
- Explain responsibilities regarding smoke detectors and the \$250 penalty to residents if they tamper with smoke detectors at time of signing rental agreement.
- If a smoke detector has been tampered with, discuss the resident's violations with the Asset Manager.



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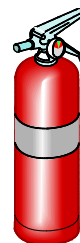
SMOKE ALARM / CARBON MONOXIDE ALARM ADDENDUM

- Use this addendum to further verify the resident was informed of the responsibilities involving the maintenance of the smoke / carbon monoxide detector; this protects the On-Site Manager, Norris & Stevens as managing agents, and the owner.
- The On-Site Manager, Assistant Manager, or Leasing agent is to have all residents sign in the designated area.

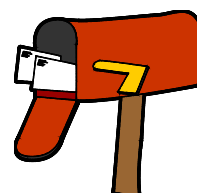
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RESIDENT MOVE-IN PACKETS provide necessary information to the resident relating to their new community and neighborhood. Move-In packets should be tailored to each community and given with the keys and parking permits, if any.

- Locations of water & electrical shutoffs.
- Location of fire extinguishers.
- Fire escape plan.
- Recycling information.
- Informational sheet with name and addresses of vendors for electricity, cable hookup and telephone service.
- Community newsletter, if applicable.
- Maintenance and Repair Request.
- Bus schedules.
- Information on schools, hospitals and shopping centers.
- Neighborhood business coupons.
- Fire safety information.
- Business card and/or brochure (for friends).
- Change of address card for post office.



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Mailbox facilities will vary from community to community.

- Provide 1 or 2 keys to the locking mailbox, if applicable.
- Do not post the resident's name unless required by the local Post Office.

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Keys are to be provided for all working locks for all entrance doors and windows per ORS 90.320(L). An additional key fee or deposit may be charged for special keys such as for the mailbox, laundry or recreation room.

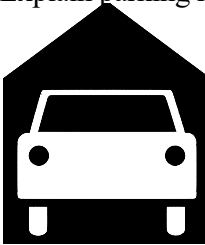


- Always change locks on all dwelling entrances, including deadbolts if present, on turnover.
 - Issue entry keys for each adult resident; usually two (2) entry keys, one (1) mailbox key, and two (2) laundry keys per dwelling.
 - Note the number of keys issued on Check In/Out & Final Accounting below item #26 "Smoke Detector/Alarm".
- Explain to resident the lockout policy and when lockout fees are charged.
- Explain to resident they may be charged for replacing lost keys, or fobs.
- Residents *are not* to install their own locks or other device to function as a lock.
- The On-Site Manager must possess a working key for each dwelling at all times.

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Parking is assigned in some communities where resident parking is extremely limited, or parking violations have required management to place control on residents' and visitors' vehicles. "Resident parking permits" may also be used to regulate the number of authorized resident and visitor cars on the property when parking spaces are not assigned.

- Issue parking permit, if applicable.
- Explain parking rules and regulations; stress parking location for visitor parking.



- Allow only one parking space per dwelling unless other arrangements have been made for two cars.
- Do not allow boats, campers, trailers, recreational vehicles, semi-truck cabs and trailers, non-running vehicles, or extra vehicles to be parked within the property.
- All residents must park head-in only; this reduces the noise and exhaust that reaches the dwellings, and creates a more pleasing appearance.
- All vehicles must be operable.
- Make clear the process followed when a car may be towed.

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WELCOME GIFTS can be given to every new resident after the rental agreement has been signed. Alcoholic beverages *are not* to be given.

- Baskets of household supplies or food products.
- Houseplant or coffee mugs printed with community name.
- A Hershey kiss with welcome note.
- Gift certificates or trial memberships.
- Free samples.
- Door mat.
- Toilet paper, paper towels, etc.



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MOVE-IN FORMS SUBMITTAL CHECKLIST

- Use this checklist as a cover sheet to all the move-in documents required for each new resident.

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1991 OREGON RECYCLING ACT was adopted into the Oregon Residential Landlord and Tenant Act (ORLTA) ORS 90.318. This recycling legislation requires multifamily communities to provide recycling collection and education if the service is provided by the local garbage hauler.

- Multifamily is defined as five or more dwellings.
- Must provide separate location for containers for at least four principal recyclable materials.
- Must have regular collection service.
- Must notify residents at least once a year of the opportunity to recycle.
- New residents must be notified of the opportunity to recycle at the time of move-in.



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EDUCATION is required at least once a year informing residents about the on-site recycling services and how to recycle. New residents must be given information at the time of move-in.

- Provide recycling information at move-in.
- Show new residents the location of the recycling depot and explain source-separation.
- Distribute recycling information once a year to all residents.
- Distribute free handouts or brochures about proper material preparation provided by local recycling agencies or garbage haulers.
- Provide information about additional recycling opportunities, such as a neighborhood drop-off center, if available.
- Place posters in common areas, include information in newsletters if applicable, or invite the residents to a recycling presentation.



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RECYCLING NOTICE

- Use this notice to inform new residents of our participation in the recycling program, and to existing residents as continuing instructional information on why and how to participate.
- The On-Site Manager, Assistant Manager, or Leasing Agent is to have all residents sign this form in the designated area.
- Distribute the notice once a year with the flyer Everyone Can Recycle.
- Include in the move-in packets for new residents.
- Give a copy to the resident.
- Keep the original copy in the "Resident File", after uploading into Docs Box with move-in packet.

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ELECTRICITY conservation is important while in the community's common areas. Residents should be informed of steps they can take to participate.

- Check vacant dwellings daily for heat, lights, and appliances that may have been left on.
- Use LED, halogen, and/or compact fluorescent lighting in common areas when possible.
- Lights in laundry rooms should be on automatic timers or motion detectors.



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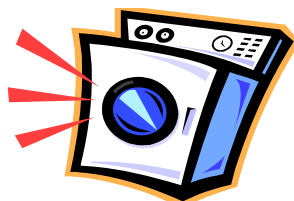
ELECTRICAL service is, in most cases, the responsibility of the resident. In cases where an electrical meter is shared, charges may be separated to the residents affected or included in their monthly rental amount. Wiring and fixtures are the responsibility of the landlord.

- Call the electric company before every move-in; confirm that the resident called to put service into their name; enter the resident's account number on the rental agreement.
- Enter the resident's account number on the rental agreement *prior* to issuing keys.
- Monitor electrical usage of the dwellings where "skips" are suspected.
- Do not allow residents to run electrical cords from plugs inside the dwelling or garage to equipment outside the dwelling or garage, or to another.



Conservation

- Monitor timers and exterior lighting; repair if lighting is not off during daylight hours; be aware of daylight savings time changes.
- Set electric water heaters at 120°F.
- Monitor laundry room dial timer to insure lights are off during non-use periods; discuss installation with the Asset Manager if no timer is in place.
- Monitor electrical usage from motors such as sump pumps.
- Clean lint traps in dryers daily.



WATER conservation is best monitored and regulated through plumbing maintenance and adjustments, and proper lawn watering.

- Water lawns in early morning or late evening for best results. You only need about one inch per week for a healthy, green look.
- Install energy efficient showerheads, if available.
- Check toilet tanks for leaks; install toilet water saving device, if available.
- Check leaky faucets; install water-saving aerators, if available.

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UNLAWFUL DEBT COLLECTION

- Do not threaten the use of force or violence towards the resident, his family, or his property.
- Do not threaten to seize the resident(s) property.
- Do not use profane, obscene, or abusive language with the resident or his family.
- Do not talk with the resident or any member of his family *repeatedly* or *continuously* or at times known to be inconvenient to them.
- Do not discuss the payment practices of the resident(s) with anyone not listed on the Rental Agreement (MFHCO Form 1); do not contact the resident at work without their permission.

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COLLECTION POLICIES provide the guidelines for the On-Site Manager when they perform the responsibilities of collecting and reporting all monies generated by the property. Because this is the lifeline of the owner's investment, it is necessary to have an accurate, legible system in place where periodic audits can follow the daily activity.

- Define and encourage good rent collection practice to the new resident(s).
- Make it very clear - rent is due on the 1st, late fee charged after 12:01 am on the 6th, and eviction proceedings will begin with a legal notice on the 8th.
- *Checks or money orders only; cash will not be accepted.*
- Make deposits every day money is received.
- Explain to the resident(s) that partial or late payments will not be tolerated. If you receive funds for less than the full rental amount, notify your Asset Manager.
- A late charge is assessed on the 6th; for most communities, late charges are \$75.00.
- \$35 is charged for all returned checks (NSF, missing signature, closed accounts).
- Your property should not have more than 7% of the total rents to be outstanding by the 8th of the month when due.
- Provide the necessary reporting documents timely.
- Enforce the collection of all monies unless waived by your Asset Manager. Use the For Cause notice for any money owed other than rent. (Available in Docs Box)

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RENT PAYMENT POLICY

- Use to inform applicants and residents of the required payment policy.
- Display the framed poster prominently in the rental center; replace as necessary to display the most up-to-date version with a neat appearance.

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Skyline Rent Posting and Accounting System

- ▶ You will get training from your property's accountant specifically on how to use this system.

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Rent Receipts are confirmation of payment received. If given, it is important they are written correctly.

- You can print them directly from Skyline after posting payment.

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FORMS OF PAYMENT are restricted for your safety, to protect the owner's interest, and to preserve our rights if a non-payment issue results in court. Although it may be inconvenient to your residents, you must make certain payments for rent and other charges are collected only in the acceptable manner and form.

- Cash is not to be accepted for rent, fees, or deposits; cash will only be accepted for applicant screening fees to screen the submitted application. Norris and Stevens has a “*no cash policy*”
- Two party checks are not to be accepted; *however checks payable to the resident and the community from a government agency will be accepted.*
- Third party, payroll, or government checks are not to be accepted.
- Rent checks are not to be accepted from someone other than the person(s) listed on the rental agreement; be careful of relatives or others making payments for resident(s) that are out of town, in the hospital, or otherwise unable to make the rent payment.
- Roommates must pay rent with one check or with money orders; two checks are not to be accepted because they could result in a partial payment if one was returned.
- Postdated checks are not to be accepted.
- Promissory notes are not to be accepted.
- Checks or money orders are to be made payable to the community; checks should not be made payable to Norris & Stevens, Inc. or the On-Site Manager.
- Checks or money orders are to be made payable for the correct amount.
- The correct dwelling number must appear on each check or money order.

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Prorating is necessary if a resident moves-in or moves-out other than the first or last day of the month. Prorating the first month makes it easier for qualified residents to move in requiring less of an initial financial outlay. Docs Box will do most of the proration for you. If the case is needed:

- Always divide the monthly rent by thirty (30).
- Multiply the daily rate by the number of days the resident(s) occupied the dwelling.
- *Always* prorate the first month's rent; not the second month's rent.
- Rent is prorated to the penny; do not round up or down.
- Never accept partial payments.

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MONEY COLLECTED is always to be receipted and deposited daily.

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Rent Credits and Concessions to the employee(s) or new resident(s) must always be receipted/recorded.

- record rent credit given to all on-site employees as part of their compensation.
- record a rent concession given to a resident(s) on the rental agreement.
- ▶ See your Skyline Training Manual and/or speak to your accountant for further information

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MAKING THE DEPOSIT

- Endorse all checks and money orders upon completion of the receipt.
- Make deposits *every day money is received*.
- Use the supplied “*Remote Deposit Capture*” (*Check Scanner*) to make your deposits.

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RETURNED CHECKS are occasionally received and deducted from the operating account of your community. This occurs when the check maker does not have enough funds in the account, the signature is missing or does not match, or the account has been closed.

- Your accountant checks the property’s bank account daily online, the bank will show if a check has been returned. If so, you will be notified at that time.
- Your accountant will process the NSF in Skyline and add the NSF fee.
- Replacement funds must be in a form of a money order or cashier’s check; *do not re-deposit a the check*. You do not collect a late charge if the funds have been replaced by the fifth (5th) of the month.
- You do charge the NSF fee.
- The On-Site Manager is to complete a returned check notice to the resident(s) and serve it with the Non-payment of Rent Notice.
- Only one NSF check will be accepted before money orders or cashier's checks will be required. In other words, once a resident’s check has been returned, we will no longer accept their checks.
- Do not deposit a replaced check even if a copy of the returned check has not been received.

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RETURNED CHECK NOTICE

- Use this notice to inform the resident(s) that their personal check had been returned unpaid.
- The On-Site Manager is to complete this notice.
- Give the original copy to the resident(s) with the 72-Hour Notice.
- Keep a copy in the "Resident File".

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Returned Check Fees are processed by the property's accountant in Skyline.

- Returned check fees are to be charged for all NSF or otherwise returned checks unless waived by the Asset Manager.
- Returned check fees are limited to \$35 per occurrence, plus late fees, if any.

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LATE PAYMENTS

Reminder Notices are used as a friendly reminder to those residents who routinely pay after the 5th, and to those residents that are so busy that they have forgotten to pay their rent.

- Distribute the "Have you Forgotten?" reminder notices to residents who have not paid their rent by the 4th day of the month

HAVE YOU FORGOTTEN?

- Use this door hanger to remind residents to pay their rent.
- Complete the notice in duplicate on the 4th of the month; this allows a reminder before the late fee is assessed on the 6th.

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Rent Payments not Paid by the Eighth require the On-Site Manager to issue a Notice of Non-Payment of rent. (72 hour notice)

Nonpayment of Rent Notices are to be issued regardless of the reason for non-payment.

- Prepare a Non-Payment of Rent or 72-hour notice for all residents with rent unpaid by midnight on the 7th; serve notices on the 8th; use this as the standard nonpayment notice form located in Docs Box`.
- Payment of rent alone meets the requirement of the nonpayment of rent notice. We cannot proceed to file in court on any late fees or unpaid utility charges, using the 72 hour notice.
- Check all notices prior to service to ensure they are complete and accurate.

72-hour Notice or Non-Payment of Rent Notice

- Serve notice by posting it on the resident's door at eye level, centered, and taped at all four corners and mailing it by first class mail (*post & mail* delivery) on the 8th, *or*;
- Serve notice by personally delivering it to any resident named on rental agreement at least fourteen (14) years of age.
- Explain our intent of proceeding with the eviction process; that unpaid rent will be turned over to a collection agency; evictions and collections are public records and reflect on credit history reports for seven (7) years.
- Payments are not to be accepted after the 72 hours has expired without authorization from Asset Manager.
- Court proceedings shall be initiated by the On-Site Manager by emailing the process server, (e.g. Action Services) make payment for service with a Purchase Order and petty cash.
- Inform your Asset Manager of every step in the process including the hearing date.

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NON-PAYMENT OF RENT NOTICE OR 72 HOUR NOTICE

- Use this notice when the resident(s) has not paid their rent by midnight of the 7th day of the month.
- The On-Site Manager is to complete this in notice in Docs Box on the 8th day of the month.
- If previous checks have been returned; check the box next to: Rent is past due. Payment must be paid by money order or certified funds due to the return of previous checks
- Rent amount due: Enter the amounts; Rent, Late Charges, NSF fee (if applicable) in the corresponding fields.
- Any other amounts should be listed in “other” such as: water, sewer, garbage.
- If you've posted this notice, mail a copy to the resident(s) on the same day to comply with the post & mail requirements.
- Keep a copy in the "Resident File".

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Late Fees are always imposed when a resident does not pay on time. Residents need to understand their housing depends upon their ability to make their rent payments in a timely and acceptable manner. Late rent payments could indicate the formation of a bad habit.

- Encourage residents to pay on the 1st to avoid late charges.
- Use rent payment reminders; “Have you forgotten”, on the 4th.
- Charge late fees on all payments received after 12:01 a.m. on the 6th of the month.
- The On-Site Manager cannot waive late charges for any reason without written approval by the Asset Manager.
- Late fees are to be charged for all late rent payments unless waived by the Asset Manager with written approval. If not paid by the 15th of the month, issue a For Cause Notice for money owed to collect the past due amount.
- Late charges are to be collected in full by the end of the accounting month in which they were assessed.
- Unpaid charges are to be recorded in Skyline with the balance carried forward until paid.
- When late charges are collected, indicate the rent collection period to which they apply.

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NOTICE OF FOR CAUSE TERMINATION

Use this form for past due monetary amounts. (What do you do if utilities or late fees are not paid?)

You can locate this form in Docs Box under “#3 – Rent Collection” and use it specifically for these past due monetary amounts.

- List the total amount due
- Detail breakdown of balance

Example: Amount listed is \$105.00; detailed breakdown is water/sewer \$25.00, garbage \$5, late charges \$75.00

- A copy of this document should be sent to the Asset Manager to review prior to issuing, and upon issuing the notice for the record. Continue to work with your Asset Manager regarding any deviations or questions that come up during the process.
- Serve notice by posting it on the resident’s door at eye level, centered, and taped at all four corners and mailing it by first class mail (*post & mail* delivery)
- Add an additional 3 days for mailing to first notice time. 15 days plus 3 days for mailing, the first date to remedy the issue should be 18 days from the issue date. Count out 18 days and mark the calendar and then 33 days and make a second note on the calendar.
- These dates should be on the office calendar and the property’s Google calendar. If the resident does not pay the amount due, thus remedying the eviction notice by the first date, they will need to move out by the second date.
- Acknowledge their decision to vacate, if applicable, by issuing a Confirmation of Termination Notice found in Docs Box. Any succeeding eviction notices should reflect the resident’s intention to vacate.

If followed regularly, this notice can be used to make sure there are no past due amounts at any given community. Further information on “For Cause” notices can also be found in Chapter 12 page 151.

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Confirmation of Termination is used to confirm the departure of a resident whenever there is some question as to the pro-rated rent or to clarify Move-Out date and monies due. This is a great notice to follow up a For Cause Notice that is not remedied in the first 15 days. Use this Notice on the 16th day to confirm the choice of the resident to vacate rather than remedy the For Cause. Since it is an informative notice and does not require signatures, there is no harm in issuing the Confirmation of Termination to clarify information for any Move-Out.

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EVICTIION NOTICES must be served advising the resident of the management's intentions before proceeding with any eviction. All notices must be properly completed and properly served. The notice is to state the number of days the residents have in which to comply, the resident's names, the address of the dwelling, the amount of rent due for non-payment notices, the date of the notice, and the On-Site Manager's signature.

Notice Guidelines

- Use the correct notice for the situation.
- State the proper timing for any corrective action or termination.
- Serve the notice properly.
- Spell names correctly. (Make sure resident's names are spelled correctly in Docs Box)
- Do not accept any rent with the knowledge of the violation to the rental agreement, rules and regulations, or law.
- The rental center must be available to the resident throughout the period of the notice for the purpose of paying rent.

How Notices are Served is defined in ORS 91.110 which states all notices must be in writing and must be served upon the resident by one of three methods defined in ORS 90.155.

Personal delivery

- ▶ Can be used for any notice.
- ▶ Make delivery to any resident over fourteen (14) years of age.
- ▶ Do not deliver to guests or unknown occupants.

Post & mail

- ▶ The rental agreement must provide for the service of notices by *post and mail*; all forms contain this provision.
- ▶ Non-Payment of rent.
- ▶ 24-hour notice for personal injury by person or pet.
- ▶ 24-hour notice for property damage by person or pet.
- ▶ 24-hour notice for outrageous conduct.
- ▶ 24-hour notice to enter.
- ▶ Post notice on the main entrance door of the dwelling above child height with tape on all four corners (use painter's masking tape to avoid damaging the door finish).

- ▶ The same person that posted the notice must mail the notice by first class mail, the same day.

First class mail

- ▶ Can be used for any notice.
- ▶ When served by mail only, the notice must be extended by adding three (3) days.
- ▶ The notice must state three (3) days were added as mailing time.
- ▶ Certified or registered mail is not considered first class under the Oregon Residential Landlord and Tenant Act per ORS 90.100(16).
- ▶ Request a certificate of mailing, if proof is needed.

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NON-PAYMENT OF RENT situations can almost always be avoided, but it requires persistence, consistency, and firmness by the management. The first step is to explain the collection policies during the application process and again at the move-in appointment; making it clear that rent is due on the first, late on the 6th with a Non-Payment of Rent (72 hour) notice served on the 8th.

The Date a 72-Hour Non-Payment of Rent Notice is Served depends upon the situation. However, most 72-hour notices are served on the 8th day of the month. *Remember - if rent is not paid, a 72-hour notice must be served.* The most common circumstances that occur in a non-payment of rent situation are described. For assistance with any situation not fitting the situations described or are a combination of two or more situations, contact your Asset Manager. An eviction is a legal process. The landlord must be sure all points of the ORLTA, along with other laws, are followed.

When the rent payment cannot be made until after the 8th

- ▶ Obtain your Asset Manager's approval.
- ▶ Explain to the resident that late fees will be charged and 72-Hour Notice will be issued as part of the normal collection procedure.
- ▶ Serve a 72-Hour Notice on the 8th.

When one or more roommates have moved-out or refuse to pay

- ▶ Do not accept partial payment.
- ▶ Issue 72-hour notice on the 8th.
- ▶ File an FED on the 12th, if the resident has not paid or vacated the dwelling.

When the resident gives a 30-Day notice to vacate

- ▶ Continue communication with the resident to learn their payment and move-out plans.
- ▶ Advise the resident they need to pay any rent due prior to vacating to protect their credit and rental histories.
- ▶ Do not apply, or promise to apply, all or part of any security deposit held towards any rent due.
- ▶ Issue a 72-Hour Notice on the 8th if the resident is still occupying the dwelling without payment of rent.
- ▶ File an FED on the 12th if the resident has not paid or vacated the dwelling.
- ▶ Include any rent due on the Check In/Out and Final Accounting.
- ▶ Continue collection process until all monies are received.

When a resident is suspected of skipping

- ▶ If a resident has vacated, no 72-hour notice is necessary.
- ▶ If it is unknown whether or not the resident has definitely vacated, issue 72-hour notice on the 8th as usual.
- ▶ File FED on 12th if resident has not vacated or if cannot be determined that they no longer occupy the dwelling.

When a resident claims habitability issues, retaliation, unlawful debt collection or harassment

- ▶ discuss the situation with your Asset Manager.

How to Serve a 72-Hour Notice

All 72 hour notices are served by:

Post & mail

- ▶ This is the most effective method of service because residents may not be home at the time of service.
- ▶ The notice time begins at 12:01 a.m. and ends at 11:59 p.m. per ORS 90.160(2).
- ▶ Post copy of notice on main entrance above child's reach, the same person who does the posting is to mail a copy of the notice by first class mail to the resident.

Accepting Rent**Before the 72-hour notice is issued**

- ▶ You have to accept rent after the 8th if no 72-hour notice has been issued.

Before the expiration of the 72-hour notice

- ▶ You have to accept rent in a response to the notice issued within the specified time.
- ▶ Partial payments are not to be accepted.

After the expiration of the 72-hour notice

- ▶ You may accept rent after the expiration, ***but you are not required to***; discuss each situation with your Asset Manager.
- ▶ If you accept rent, you have voided the notice issued.

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NOTICE OF NONPAYMENT OF RENT**72-Hour Notice**

- Use this notice to start the eviction process for all residents that have not paid their rent by 11:59 p.m. on the 7th or the rent was not found delivered through the drop slot found at the opening of the office on the 8th.
- The On-Site Manager is to complete this notice and make a copy for the “resident’s file” and to be uploaded into Docs Box. Rent is unpaid as of the 8th day or whenever you are notified of a returned check. If resident is receiving Housing (section 8), also mail a copy to their case worker.

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UNAUTHORIZED PET is any animal not listed on the Pet/Aid Animal Addendum and/or when the required deposits or fees have not been paid.

- An additional Pet/Aid Animal Addendum must be completed for each authorized animal.
- All pets must meet the pet restriction criteria of the community; discuss with your Asset Manager if this criteria is unclear.
- "Visiting" animals are not allowed and should be treated as unauthorized.
- "Assistance or aid animals" or "prescription pets" must be qualified as such, otherwise they are unauthorized; a written prescription from the medical care provider will be required for each animal.

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PET VIOLATION

- Use this notice when an unauthorized animal is discovered in the community.
- The On-Site Manager is to complete this notice upon the discovery of an animal and prior to rent payment.
- The notice gives the resident time to remove the animal from the premises or vacate the premises.
- On-Site Manager must maintain documentation or other evidence such as pictures.

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Further Action

- File the FED if the resident fails to remove the animal and vacate the premises.
- Speak to your Asset Manager regarding a 30-day notice for cause or a 60-day notice with no cause.

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PARKING VIOLATIONS should be addressed as soon as discovered by management.

- Enforce parking rules and regulations by first discussing the most common problems with new residents at the move-in appointment; make clear their responsibility for themselves and guests.
- Have all curbs designated "No Parking" well marked with clean, fresh paint.
- Place signs to assist residents and guests in locating appropriate parking. Example: "Handicapped Parking", "Resident Parking", or "Future Resident Parking".

Parking improperly shall result in a written notice to the owner of the vehicle. Violations include:

- using two or more parking spaces.
- blocking another resident's vehicle or parking space.
- parking on the sidewalk, grass or planted areas.

Parking in a designated "no parking" or restricted zone shall result in a written notice. Vehicles are to be towed immediately if parked in a fire lane or other posted "No Parking" areas. Violations include parking:

- In a handicap space; this is in violation of Oregon Revised Statutes.
- Along the red painted curbs designated as fire lanes.
- In front of a fire hydrant or walkway.

Towing a resident's vehicle is a very unpleasant job. Address the community rules regarding parking at the move-in appointment, and by posting appropriate signs approved by your Asset Manager. Arrangements should be made with a towing company before they are needed. Most cities require towing signs to be posted, even if no ordinance exists. Make sure they are clean, and legible.

- Signs must be posted at the entrances indicating vehicles parking in unauthorized locations will be towed per ORS 98.805 - 98.840.
- Work with an approved towing company; obtain a copy of the towing agreement or discuss engaging a company with your Asset Manager.
- Tow vehicles immediately when they are parked in a fire lane.
- Give ample remedy time (but not less than 3 days), before towing vehicles for minor violations.

NOTICE OF PARKING VIOLATION

- Use this notice to inform the resident(s) or guest(s) of the resident for any vehicle violating the rental agreement, Rules and Regulations For Better Living, fire code regulations, or ADA regulations.
- The On-Site Manager is to complete this notice in duplicate; other on-site staff members may write the notice with the approval and direction of the On-Site Manager.
- Attach the copy to the violating vehicle.
- Keep the original in the "Resident File" and after uploading it into Docs Box

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VIOLATION NOTICES may not always necessitate an immediate termination of the rental agreement. Prior to issuing a Violation Notice, check with your Asset Manager to see what the best course of action is.

- ▶ A Violation Notice is useful to alert a resident of inappropriate action or provide a warning for repeatedly violating the Rental Agreement.
 - Always send your Asset Manager a copy of the notice prior to issuing it.
 - Choose the option to mail the notice rather than post and mail or any other delivery option.
 - Rules apply to everybody: Residents; Family/Children; Visitors; Animals; etc.

Noise Disturbances should always be addressed so control can be retained over the community.

- One time disturbances, noise associated with holidays or local festivals, or infrequent occurrences should be handled by issuing a Notice of Violation/Disturbance.
- Noise associated with illegal activity, personal injury or major property damage should be reported to your Asset Manager immediately. The notices that may be issued by your Asset Manager include the 24-Hour Notice of Eviction, 30-Day Notice of Termination With Cause, and the Notice of Termination of Tenancy.

Property Damage may occur without the knowledge of who committed the act.

- Use the Notice of Violation/Disturbance when a resident is suspected of being involved, or the damage is relatively minor.
- Major damage should be reported to the Asset Manager immediately. Do not issue a Violation Notice for any major damage unless a stronger notice will not apply. Your Asset Manager may choose to issue a 24-Hour Notice of Eviction for Endangerment or a For Cause Termination notice.

Unauthorized Occupant may be suspected when no actual proof exists. Whenever it is suspected or known that someone other than those named on the Rental Agreement are residing in the dwelling, action must be taken.

- When the situation is suspected or a resident's guests have stayed past the stated time to the management, issue a For Cause Notice for Unauthorized Occupants rather than a Violation/Disturbance Notice. This will allow your residents 15 days to correct the situation. The unauthorized occupants may leave the premises or they may apply to become residents and be added to the Lease/Rental Agreement.

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NOTICE OF VIOLATION/DISTURBANCE

- Use this notice to notify and document any violation or deficiency by the resident(s) and/or their guest(s), if your Asset Manager recommends
- If the resident is receiving Housing (section 8); you must also mail a copy of the Violation Notice issued to their case worker.

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Further Action

- Request your Asset Manager to issue "no cause" or "for cause" notice.
- Request your Asset Manager to issue a 24-hour eviction notice.
- File FED if the action is not corrected and/or the resident has not vacated the dwelling.

Tampering with a Smoke Detector by the resident is prohibited per ORS 90.325(2).

- Testing must be done by the resident every six (6) months and the landlord notified of any problem per ORS 90.325(1)(f).
- Smoke detectors or batteries are not to be removed by the resident; new batteries must be installed by the resident during their occupancy when necessary.
- Residents may be charged \$250 for tampering with a smoke detector.

Housekeeping becomes an important responsibility of the resident.

- They are to maintain all areas under their control in a clean, sanitary condition, free of accumulations of debris, filth, and garbage.
- Residents are to keep their patios clean and free of debris and unacceptable items such as tires, parts, dead plants, jars, etc.
- Residents are to keep their entryways free of unacceptable items, cobwebs, and other debris.

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HOUSEKEEPING NOTICE

- Use this notice when the resident(s) are not meeting the housekeeping standards of their dwelling, entryway, or patio/deck.
- Check all violations that require the resident's attention; add additional information as necessary.

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FOR CAUSE NOTICES are the recent standard used to alert residents to a violations of the rental agreement, state or local statutes and ordinances, or rules and regulations when the desired result is not to have the resident move, but to have them stop the violating action, correct the violation, or adopt new behavior. The opportunity to correct the violations are always extended in "For Cause" notices.

- This notice *must* be used for Section 8 or other subsidized residents.
- The On-Site Manager must keep records and provide documentation and/or evidence to the violations.
- The notice is written and served by your Asset Manager with two exceptions: For money owed, and for unauthorized occupant

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UNAUTHORIZED OCCUPANT is someone not named on the rental agreement. Management can take action by serving a "For Cause" notice, found in Docs Box under "#3 - Rent Collection". Examples of an unauthorized occupant:

- A person(s) "visiting" more than fourteen (14) days and nights in a calendar year.
- Roommate not named on rental agreement; addition of family member by marriage, birth or guardianship; boyfriend/girlfriend.
- Occupant living in the dwelling after the resident was evicted.

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CONDUCT OUTRAGEOUS IN THE EXTREME can be handled with a 24-Hour Notice of Eviction. Notices are to be completed by your Asset Manager. Violations include:

- A person or animal seriously threatening to inflict personal injury, or inflicted substantial personal injury upon the landlord or other residents.
- A person or animal inflicting personal injury upon a neighbor.
- A person who intentionally inflicted damage to the premises; pet damage is not included.
- A person living in a vacant dwelling.
- A person committing an outrageous act on the premises or in the immediate vicinity; this includes:
 - Prostitution or the promotion of prostitution.
 - Manufacturing or delivery of a controlled substance.
 - Intimidation limited to activity based on race which includes gang activity.
 - Burglary.

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NO CAUSE NOTICES are used to terminate a rental agreement without stating a reason. **These are not to be used within the City of Portland.**

- **Cannot** be used for Section 8 or other subsidized residents.
 - **Cannot** be used within the City of Portland.
 - It is recommended by Norris & Stevens to give a 75-day notice; this includes the standard three (3) days mailing.
 - Notice is initiated by the On-Site Manager or Asset Manager.
 - Written and served by Asset Manager.
 - Serve by *first class mail*; **post & mail is not legal service in this case.**
 - You can actually serve a 30 Day Notice (33 Day Notice) at any time prior to the lease end date; (i.e., before the lease expires), as long as the termination date specified therein is not *before* the lease end date. However; **Norris & Stevens recommends giving a 75-day notice, which includes time for mail.**
- **By Oregon law**
- In a Month-to-Month tenancy where *any* tenant in the dwelling has resided there for less than one year, you can terminate the tenancy with a **30 Day Notice**.
 - In an existing Month-to-Month tenancy, where all tenants in the dwelling have resided there for one year or more, you must terminate the tenancy with a **60 Day Notice**.
 - During a term lease, the landlord can give a **30 Day Notice** listing the lease end date as the termination date
 - **Do not give reason** or it becomes a "For Cause Notice" and time must be allowed for corrective action.

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CONFIRMATION NOTICE is used to restate the information received on a resident's 30-day notice, or otherwise make clear the move-out date and any monies due by the resident(s). This notice is to confirm every 30-day notice received from the resident(s) or a landlord 30-day notice (for cause or no cause), 10-day pet (second notice), or 24-hour notice of eviction issued to the resident(s).

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CONFIRMATION OF 30-DAY NOTICE

Landlord Notice

- Use this notice to confirm a notice given by the On-Site Manager or Asset Manager.
- The On-Site Manager is to complete this notice in duplicate (original to resident, copy into “residents file”) upon receiving resident's 30-day notice; the Assistant Manager can complete the notice with the approval and direction of the On-Site Manager.

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FED (Forcible Enter and Unlawful Detainer) is a court action used by a Landlord to remove the resident(s) from the rented dwelling (dwelling, house, manufactured home, or floating home).

- The FEDs are filed in the county where the community is located.

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LANDLORD NOTICE TO THE RESIDENT is the first step leading to an eviction.

- The landlord must give the appropriate written notice requesting the resident(s) to correct the violation or move, or to terminate the Rental Agreement without cause.
- The landlord must allow the notice period to expire before filing an FED.
- The most common notices are in Oregon are:
 - ▶ 72-Hour Notice - Non-Payment of Rent
 - ▶ 30-Day Notice - Month-to-Month Tenancy
 - ▶ 30-Day Notice - Termination For Cause
 - ▶ 30/60/180 Day Notice without cause
- In Washington:
 - ▶ 72-Hour Notice - Non-Payment of Rent
 - ▶ Unauthorized resident(s)
 - ▶ 10-day notice for outstanding non-rent charges

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FILING OF THE FED will occur if the resident(s) has not moved by the expiration of the termination of the landlord notice period, or if the resident(s) has not paid rent or moved by the expiration of the non-payment of rent notice.

- The FED must be filed in the county where the community is located.
- The On-Site Manager always completes the FED cover sheet. In Portland, and the Willamette Valley; email to: ACTION SERVICES at Intake@ActionServicesPs.com. **Action Services Phone Number (503-244-1226), Action Services Fax (503-244-1248)**. In the State of Washington; email to **Larry Holzman, Attorney at Law**, email to: Theresa@ljholzman.com (360-737-0435). These should be checked by your Asset Manager for accuracy.
- Issue a Purchase Order to Action Services for the filing fee.
- Action Services will notify you of this date, if you used a filing service.
- This date will typically be seven (7) days after the judicial day next following payment of filing fees.

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SERVING THE FED *cannot* be done by the owner or any person of the management team.

- Communities will use either a process server or the county sheriff to serve the summons and complaint as defined in ORS 105.135.
- The sheriff or process server will serve the summons and complaint by the end of the judicial day (any day that is not a weekend or holiday) following the day fees are paid.
- Service will be "personal delivery", or if the resident (defendant) is not available, he will post the summons and complaint on the main entry of the premises.
- A copy of the summons and complaint is also mailed to the resident (defendant) in the envelope provided by the landlord (plaintiff).

Your Asset Manager will be involved in all phases of the FED proceedings. Consult them for more information regarding the FED proceedings.

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GOOD RESIDENT RELATIONS mean accepting resident complaints with sensitivity, and dealing with them well enough to provide the best possible level of resident satisfaction. These are two of the most difficult tasks faced by the on-site management team.

- If residents feel free to complain to you without being put down, you have created the proper climate for good resident relations.
- Shy residents should be encouraged to "speak their mind"; they are usually the ones with credible complaints who move out unexpectedly after complaining to everyone else about what was bothering them.
- Balance needs to be maintained in complaint situations by being personal and close to the problem, yet detached emotionally so that you do not feel the complaint is a personal attack.
- Invite feedback from residents; tell them you do not have enough eyes to see the results of everything you try to do for them, and that you need their eyes also.
- Note the complaints and responses in the property's daily log.

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ESTABLISH CREDIBILITY

- *Be consistent*; residents will feel at ease when they can anticipate consistent behavior; concentrate on treating others with honesty and sincerity.
- *Keep your promises*; if you can't live up to your promise, don't make it; know your company and community's policies and make your promises accordingly.
- *Be available to help*; residents respect those who listen to them and pitch in when needed.

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GIVE YOUR RESIDENT(S) EXCELLENCE

- Something amazing happens when you treat your resident(s) with respect and show appreciation. Typically, people will tell one person about a good experience but tell ten or more about a bad one. Remember, you can make or break your own and your community's reputation in a single moment.
- There is a saying that goes: "*A happy wife equals a happy life*". In our world that same philosophy can translate to "*A happy resident is most pleasant*".

**THE TEN COMMANDMENTS
OF GOOD MANAGEMENT**

- A Resident is the most important person in our business.
- A Resident is not dependent on us - we're dependent on them.
- A Resident is not an interruption of our work – they are the purpose of it.
- A Resident does us a favor when they call - we're not doing them a favor by serving him.
- A Resident is a part of our business - not an outsider.
- A Resident is not a cold statistic – they are flesh and blood human being with feelings and emotions like our own.
- A Resident is not someone to argue or match wits with.
- A Resident is a person who brings us their wants - it is our job to fill these wants.
- A Resident is deserving of the most courteous and attentive treatment we can give him.
- A Resident is the life-blood of our business.

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WHY RESIDENTS MOVE

- 1% Die (we can't help that).
- 3% Move away to other areas of the state or country.
- 5% Form other interests (like buying a house).
- 9% Move for competitive reasons (the competition offers a lifestyle perceived better than ours).
- 14% Move because of product dissatisfaction (they don't like the dwelling).
- 68% *Because someone was rude, indifferent, or discourteous to them (we can help this).***

* * *

UPSET AND DIFFICULT RESIDENTS

- *A difficult resident can be hard to communicate with time and time again.*
 - ▶ This person has a need to get attention by being loud, obnoxious, and very disruptive; they have a way of letting everyone know how rotten he/she thinks your community is.
 - ▶ They can be dealt with in a rational way and be easily made happy; be prepared for the upset resident to repeat the cycle again for a whole new set of reasons unrelated to the previous upset.
 - ▶ An upset resident should be calmed and satisfied so they continue to renew their lease.

* * *

WHY RESIDENTS GET UPSET may be justified or not, but in order to make them happy, you must determine what has caused the upset. A few reasons for an upset resident:

- Miscommunication - Misunderstanding
- Doesn't feel listened to.
- Has been embarrassed by doing something incorrectly.
- Has expectations that have not been met.
- Has already had a stressed-out day at the work.
- Was promised something that hasn't been delivered.
- Experienced damage to personal items.
- Has been told to calm down.
- Has been told "*I'll call you back*" and never received a call.
- Had their integrity or honesty questioned.

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DEALING WITH UPSET RESIDENTS is an important element of resident retention. Keep in mind that the way a resident is treated will make all the difference in the world when the resident is considering moving. What an angry resident really wants is:

- To be taken seriously.
- To be treated with respect.
- To receive immediate action.
- To be compensated or receive restitution.
- For someone to be reprimanded.
- For the problem to be cleared up so it will never happen again.
- To be listened to.

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Non-Verbal Communication

- *Facial expressions* should be calm, concerned, sincere and interested; show you care, try not to smile if the resident is expressing anger.
- *Body posture* will show that you are attentive and interested if you stand up while addressing the resident; don't use closed body postures such as crossing your arms or clenching your fist; you want to appear non-threatening.
- *Resident's dislike:*
 - ▶ being told it's policy.
 - ▶ being told they can't.
 - ▶ being told they *have* to do something.
 - ▶ being accused of making an error.
 - ▶ being called a liar.
 - ▶ being embarrassed.
- *Excuse yourself* if you feel like you are becoming upset, want to cry, or to yell at the resident; return as soon as you have regained your composure.

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The biggest challenge is not to take things personally even though that is definitely how it feels for the resident. Great ways to diffuse a situation is to use the techniques below.

- Greet the resident pleasantly.
- Recognize there is a challenge.
- Explain thoroughly. (Either the process or why there is a delay).
- Accept responsibility and apologize.

Thank the resident for their time, patience and always welcome them back. The willingness to give them the best service possible make your applicants and residents not only want to stay but to recommend you to future residents.

- Understanding, tolerance and reliability is one of the most important aspects.
- Mindfulness: your residents trust you, and that you have the most updated information.
- Be knowledgeable to respond to most questions and never say "*I don't know*" unless you follow it up with "*but I will find out for you or connect you to the person who can answer for you*".

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IMPORTANCE OF MAINTENANCE

- *Builds traffic through curb appeal* - great curb appeal can reduce the money spent for advertising to generate traffic.
- *Helps to rent dwellings* - a fully-cleaned, well-vacuumed, painted, and immaculate dwelling will impress a prospective renter, and will instill confidence in the on-site management team.
- *Reduces turnover* - the proper handling of resident service requests will promote goodwill, and add to the overall image and reputation of the community.
- *Maintains physical value* - preventive maintenance is an absolute must for the long-term life of a development.
- *Improves cash flow and controls expenses* - an efficient maintenance operation and regularly scheduled maintenance can decrease expenses by making the best use of available manpower, equipment, and money.

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Maintenance Goals

- *Resident satisfaction*
 - ▶ Completing all maintenance requests within a reasonable time period ensures resident satisfaction.
 - ▶ The on-site management team should respond promptly to maintenance requests with good performance.
- *Satisfactory refurbishment of vacancies*
 - ▶ Turnover should be completed within three (3) days to minimize rent loss.
 - ▶ The goal is to ensure move-ins are not delayed and that the dwellings are refurbished to maximize their marketing appeal.

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OREGON RESIDENTIAL LANDLORD AND TENANT ACT (ORLTA)

defines "habitable condition" and the landlord's responsibility to maintain that condition.

Habitable condition shall be maintained by the landlord at all times during the tenancy; habitable condition per ORS 90.320(1) per ORS 90.320(1)(a) through 90.320(1)(k), and per RCW 59.18.060(1) through 59.18.060(11) for Washington includes:

- Effective waterproofing and weather protection.
- Plumbing facilities in good working order.
- Water supply that produces hot and cold running water that is under the control of either the landlord or the tenant.
- Safe drinking water.
- Connection to an approved sewage system.
- Adequate heating facilities.
- Electrical lighting.
- Buildings and grounds that are safe for normal and foreseeable uses and free of debris, filth, rubbish, garbage, rodents, and vermin.
- Floors, walls, ceilings, stairways, and railings maintained in good repair.
- Ventilating, air conditioning, and other facilities and appliances maintained in good repair.
- Safety from hazards of fire, including a working smoke detector.
- Working locks on all doors and windows.

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Entry by the landlord shall follow with at least a 24-hour notice per ORS 90.335(3) and 48-hour notice per RCW 59.18.150(6) for Washington.

- Entry can be made without notice in the case of an emergency.
- Entry must occur during reasonable times.
- No notice is required when the resident requests service in writing.

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Resident's responsibilities

- The resident is to maintain the dwelling and not deliberately or negligently destroy, deface, damage, impair or remove any part of the premises, and replace smoke detector batteries at least once every six (6) months per ORS 90.325, and per RCW 43.44.110(3) for Washington.
- The resident is to deliver to the landlord a written notice specifying acts or omissions that constitute a breach of the rental agreement per ORS 90.360 and per RCW 59.18.070 for Washington.

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Essential Service

- The landlord has seven (7) days in Oregon and one (1) day in Washington to correct any problem deemed to be an essential service and thirty (30) days in all other cases per ORS 90.360, and not more than ten (10) days in Washington per RCW 59.18.070

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ON-SITE MANAGER'S DUTIES

- Maintain the best appearance of the community.
- Schedule and supervise maintenance and repairs - turnover and routine of dwellings and common areas.
- Inspect vendors work after completion.
- Conduct routine interior and exterior inspections.
- Write Purchase Orders, not exceeding the contractual limit.
- Note any work that is the result of resident damage or misuse; bill the resident.
- Keep a dwelling maintenance log.
- Maintain the MSDS Notebook.
- Provide instruction or training for on-site personnel, if necessary.

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EMERGENCIES often occur after business hours making it essential to have an effective emergency response procedure. All personnel should be well trained in the procedures to be taken if a disaster occurs such as fire, wind storm, power outage, broken pipes, or injury.

- Post emergency telephone numbers on door of rental center.
- Know where water and electrical shutoffs are located.
- Keep Material Safety Data Sheet (MSDS) reference book updated and accessible in rental center; be certain *all* on-site personnel know where it is located, and how to use it.
- Maintain first aid kit on-site.

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REQUEST FOR SERVICE

Maintenance Request forms should be completed prior to any repair or maintenance work is performed. New residents should be informed of the maintenance request procedure and given one or two request forms for future use. Telephone requests should be followed up with the resident signing a written request form before or at the time the work is completed.

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Maintenance Emergencies do not require a notice to be given prior to entering and remedying the problem.

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MAINTENANCE REQUEST

- Use this form to have the resident(s) request repairs or maintenance.

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MAINTENANCE LOG is used to track the repairs and maintenance, and improvements performed in each dwelling. By listing all maintenance requests and turnover work performed in each dwelling, a record is created from which charges can be determined if and/or when damage occurs by the resident, preventive maintenance needs can be assessed, and provides a useful tool to counteract a non-paying resident's claim that management "never made repairs".

- Maintain indefinitely for each dwelling or dwelling.
- Maintain separate logs for common areas such as recreation rooms, laundry rooms, and office.

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MAINTENANCE LOG

- Use this log to recap all maintenance/repairs performed in each dwelling.
- All on-site personnel should be updating this log anytime work is performed.
- Enter the name of community and the dwelling number.
- Complete all columns by listing date, work ordered, Purchase Order number, vendor/employee, and cost.
- Keep in the "Resident File".

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DWELLING ENTRY by the landlord can occur in the case of an emergency, when the resident requests service, or when the landlord wishes to make repairs, upgrades, or otherwise inspect or show the dwelling.

- No employee should enter a resident's dwelling without the resident's permission except for emergencies or routine maintenance where prior notice has been served.
- Specific appointments should be avoided because they interfere with the normal maintenance routine and work schedule.
- The landlord is not to use entry into the dwelling to harass the resident; this includes making unlawful entries, lawful entries in an unreasonable manner, or entries that have the effect of harassing the resident.

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Permitted Emergency Entries include, but are not limited to, a repair problem that, unless remedied immediately, is likely to cause serious damage to the premises.

- If a landlord makes an emergency entry in the resident's absence, the landlord shall give the resident actual notice within 24-hours after the entry (actual notice is verbal notice given from the management to the resident or left on the resident's answering machine, or written notice personally delivered, mailed by first class, or delivered by post and mail).
- ▶ The notice shall include the fact of the entry, the date and time of the entry, the nature of the emergency, and the names of the persons who entered the dwelling.

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NOTICE OF ENTRY

In Case of Emergency

- Use this notice when entry has been made into an occupied dwelling; serve the notice within 24-hours after entry was made.
- The On-Site Manager/Assistant Manager is to complete this notice using Docs Box. Keep a photo copy in the residents file.

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Maintenance Door Hanger is used to inform residents workers are inside and what work, if any, was performed. This tool assists management in building a good communicative relationship with the resident. Residents feel more at ease knowing if someone is in, or has been in, their dwelling, and prevents surprises.

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MAINTENANCE IS - HI! SOMEONE IS IN YOUR HOME

- Use this door hanger when working in an occupied dwelling.
- Leave the door hanger **in the dwelling** stating someone was in their home and the work was completed.

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PERSONAL SAFETY PRECAUTIONS

- If possible tell someone when you are showing a dwelling (where you are going and when you will be back), or leave a note in plain sight.
- Implement policy of obtaining photo identification of applicant prior to showing an dwelling. Leave the document in the rental center until the tour is completed. Implement this procedure with the approval of your Asset Manager; treat every applicant the same to avoid fair housing violations.
- Restrict the time of showing dwelling to daylight hours.
- Decline showing dwelling when suspicions of safety are present.
- Keep doors locked while working in an empty dwelling.
- If possible, do not handle an unpleasant situation alone, late night disturbances, termination notices or other suspicious situations.
- Do not handle illegal activity situations; call 911 and complete an Incident Report.

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Applicant and Tenant Identification is an important tool in knowing who you are dealing with. If an applicant cannot provide sufficient identification, they are to be denied. Residents are to provide appropriate identification if the On-Site Manager is questioning their identity.

- Require government issued photo identification with all rental applications.
- Avoid labeling mailboxes or other resident directories, if possible, to maintain the privacy of the residents.
- Label mailboxes with resident's last name only; *and only if labeling is required by the Post Office* to avoid disclosing the full identification and/or gender of the residents.

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Money

- Enforce the "no cash" policy.
- Make daily deposits (The RDC machine automatically endorses the form of payment).
- Keep the endorsed form of payment in a secure location

- Refer to your accountant the procedure for proper disposal of the Checks or Money Orders endorsed by the RDC.
- Keep petty cash in a secure location.
- Do not advertise money by allowing the public to view your petty cash or to know where it is kept.

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VACANT DWELLINGS are to be visited daily and your weekly time sheet must indicate this was done. Take the necessary measures immediately to remove graffiti or to repair vandalism.

- Confirm doors and windows are secure to prevent residents and applicants from wandering in, and to avoid being a potential crime scene.
- Remove newspapers or other solicitations intended for the former resident.

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PREVENTIVE MEASURES should routinely be reviewed and adjusted before a situation becomes a matter of security. Crime prevention can be reduced through design. The key is to make sure structures and surrounding land are visible. Maintaining a property in its best condition, not only attracts the best residents, but it will also discourage many who are involved in illegal activity. Thoroughly screening all possible residents will deter much unwanted activity. Action must be taken as soon as illegal activity or violations of the rental agreement are known; this may mean reporting the activity or terminating the rental agreement.

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Lighting

- Use lighting to its best advantage; criminals or unauthorized persons do not want to be seen.
- Eliminate vandalism by making sure light fixtures are out of reach to avoid missing light bulbs or broken fixtures by anyone passing by.
- Repair outdoor lighting that is not working as soon as possible.
- Replace burned out light bulbs as soon as you know of them.

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Vandalism

- Repair broken windows, fences, or structures as soon as noticed.
- Complete an Incident Report and inform Asset Manager; insurance coverage may be available.
- Call the police when advised.

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Graffiti is a crime. In most cases it is the result of individual acts of vandalism perpetrated by people seeking attention.

- Remove graffiti as soon as noticed; fast action improves the chances of a good clean-up.
- Identify the surface being cleaned and the graffiti materials used (most common are grease pencils, felt tipped pens, and spray paint).
- Take a picture for future reference, then clean the surface.

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Master Key Control

- Do not allow master keys to leave rental center.
- *DO NOT* give a master key to *any* outside contractor or vendor.
- Do not display keys or allow them to be accessible to the public.
- Maintain a coded identification system and store separately from keys.
- Keep a set of rental center, common areas, and master keys in a separate location in case rental center is vandalized.
- Keep appropriate copies of keys in a secure location; lock box or locked room.

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Entry and Deadbolt Locks

- Immediately repair defective locks.
- Change locks after each resident move-out.
- Do not allow residents to change locks or add deadbolts; make sure to get all copies of keys issued.
- Ensure deadbolts are thumb-turn, not two-keyed locks.

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Peepsopes

- Before installing, get Asset Manager approval.
- Install to provide safety for residents approximately 4½-feet from the door bottom particularly when entrances are not visible from a window.
- Peepsopes will reduce the installation of security chains that damage door frames.

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INCIDENT REPORTS should be completed and forwarded to the Asset Manager for vandalism, graffiti, towed cars, illegal activity, or police involvement.

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INCIDENT REPORT

- Use this report to record activity within the community that resulted in damage to property or is considered potentially dangerous (use the Accident Report for bodily injury).

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UNAUTHORIZED OCCUPANTS / RESIDENTS are always to be questioned, and the appropriate measures taken to remedy the situation.

- Visitors are restricted to fourteen (14) days and nights in a calendar year; time extensions may be approved by the On-Site Manager, if reasonable.
- Persons requesting to be added to the rental agreement must apply by completing a Rental Application.
- Create a For Cause notice for Unauthorized Occupant(s) if you know or suspect unauthorized person living in a dwelling with the resident
- Request your Asset Manager to write a 24-hour notice for unauthorized occupants in a dwelling when none are listed on the rental agreement.
- Rent is not to be accepted with the knowledge of an unauthorized person living on the premises unless a notice was issued or action to remedy has been taken.

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DEALING WITH PESTS

Dwelling Turnover should include removing all "disposable items" immediately after move-outs. By removing the food source for many pests, their infestation should be minimized or eliminated.

- Take food out of the refrigerators; remove all disposable items.
- If present, treat for fleas, cockroaches or bed bugs before the dwelling has been cleaned.

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Complaints about pests should be handled with customer service in mind. Part of the solution will be determining where the source of the problem is, or has started.

- If you suspect that the source may be in one of the dwellings surrounding the complainant, then *all* dwellings in question should be treated; this may involve the entire building.
- Request the resident(s) cooperation; give them instructions for flea or cockroach clean-out, emphasizing their responsibilities.

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Pest-Control Services are usually contracted for infestations of cockroaches, carpenter ants (not sugar ants), and bees, and bed bugs. Proper application, handling and storage is essential of the toxic chemicals required to be used.

- Use an approved vendor.
- Conduct follow-up inspections.
- Vendor call-backs should be made immediately if the problem has not been resolved.
- On-going pest-control services requiring a contract to be signed must be done so by your Asset Manager.

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FLEAS are wingless, red-brown to brown or black, and the size of the head of a pin. They are commonly brought indoors by dogs, cats, or rodents. Adult fleas live on blood. They prefer dogs or cats, but customarily leave two to three small bites in a row on humans' lower legs.

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Control Approach is to kill the adult fleas in an area and interrupt the pre-adult flea's life cycle before they emerge as a biting, egg-laying adult by spraying the carpets and floors with residual sprays, and by applying residual spray, dust, or aerosols in cracks and crevices around moldings.

- Aerosol "bombs" give short-term relief.
- Fog indoors to kill both adult fleas and to interrupt the flea larvae life cycle.

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Preventive Measures

- Resident's pets should be treated for fleas.
- Vacated dwellings known to have housed pets should be treated after move-out and before cleaning.

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FLEA EXTERMINATION NOTICE

- Use this notice to inform the resident(s) of the extermination process that will be taking place in their dwelling(s).
- The On-Site Staff is to complete this notice and give to the resident, and a copy for the "resident file") for all dwellings involved.

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COCKROACHES do more emotional and psychological damage than any other common pest. However, some people are allergic to them and the substances they leave behind or excrete. Cockroaches may also carry diseases. Extermination should always be done by a licensed professional exterminator.

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COCKROACH EXTERMINATION NOTICE

- Use this notice to inform the resident(s) of the extermination process to take place in their dwelling(s).
- The On-Site Staff is to complete this notice and give to the resident, and a copy for the "resident file") for all dwellings involved.

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BED BUGS are small, brownish beetles and not always easy to detect. If someone complains of bed bugs, request a sample to verify before starting an extermination process and save the sample to clarify how broad of an area you will need to treat, should anyone else complain of them.

Control Approach

- The best treatments available do not completely eliminate the problem with one treatment. You will be controlling the situation over some time to make certain the situation is handled. Work with your Asset Manager to find a good Pest Control company and instruct residents on best prevention practices. Continue to follow up until the situation is contained and eliminated.

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CARPENTER ANTS are usually confused with dampwood termites; both live in colonies and damage wood, however, they are controlled in different ways. Carpenter ants are usually black or black-and-red, large, move fast, and they bite; workers are often ¼-inch long or longer; queens may be 5/8-inch long. They do not eat wood; they kick out the sawdust-like chewings during nest building; they feed on other insects, plant sap, pollen, and seeds. (Termites and wood-boring beetles do not make sawdust.)

Control Approach

- Look for dead, winged ants on windowsills or in light fixtures or for piles of wood dust; indoors or out, check for damaged wood, then tap it with a hammer to seem if it sounds hollow.
- Carpenter ants are most commonly eliminated by using a toxic dust such as Ortho-Klor® Ant Killer Dust, which workers pick up and bring back to the nest.

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PURCHASE ORDER LIMIT is typically set based upon the amount of your Petty Cash as shown in your employment agreement. On-Site Managers will be informed of their Purchase Order limit by the Asset Manager. A new On-Site Manager may be required to obtain all Purchase Order numbers from the Asset Manager before receiving Purchase Orders. Payment for any product or service exceeding the On-Site Manager's limit will require an authorized Purchase Order written by the Asset Manager.

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On-Site Manager Responsibilities

- Obtain your Purchase Order limit from the Asset Manager; retain the memo authorizing the Purchase Order limit in the "Purchase Order Notebook".
- Request your Asset Manager write a Purchase Order when it exceeds your limit.
- Request increases to the Purchase Order limit from your Asset Manager.

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EMPLOYEE WORK sometimes requires a Purchase Order to be written.

On-Site Personnel

- The Asset Manager must write a Purchase Order for any on-site employee to exceed their weekly work hours as stated in the employment agreement.
- A Purchase Order must be written prior to any work begins.
- The On-Site Manager cannot authorize work to exceed an existing contract.
- The Purchase Order must be listed under "P.O. number" on maintenance earnings request; the weekly time sheet must include the Purchase Order number.

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PURCHASE ORDER NOTEBOOK is used to store used and unused Purchase Orders. By utilizing this system, Purchase Orders do not become lost and can be reviewed easily.

- Use at least a 3-inch three-ring binder notebook marked "Purchase Order Notebook".
- Fill by placing the lowest pre-printed Purchase Order number at the back.
- Place a page divider between Purchase Orders at the back and Purchase Order Log at the front.

- Keep the Purchase Order Notebook current by removing and discarding Purchase Orders and Purchase Order logs older than twelve (12) months.
- Keep the "Purchase Order Notebook" with other rental center notebooks and reference manuals, handy but off the rental center desk.

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WRITING THE PURCHASE ORDER is to be done on an as needed basis *prior to any work being performed*. The Purchase Order number is created by adding the community "property number" and the pre-printed "Purchase Order number" together. Purchase Orders without "property numbers" may be returned.

- Do not print a new Purchase Order from Docs Box, and make up your own numbers. These are to be ordered from forms@norris-stevens.com
- Complete the Purchase Order as required.
- The original is to be scanned and emailed to your accountant along with any other weekly paperwork at least once a week; file original in the Purchase Order Notebook.
- When a Purchase Order Log has been completed for the week, simply draw a single line, skip three - four lines and continue writing in the Purchase Orders.

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PURCHASE ORDER

- Use this form to authorize the purchase of supplies or service limited to the employment agreement.
- Complete the form in duplicate (2 parts: original/white, second/yellow) as needed, before any work begins.
- If this Purchase Order is to be charged back to a resident, enter the name of the resident, the dwelling number of the resident, and the amount to be charged to the resident.
- The On-Site Manager must sign the Purchase Order giving authorization for the work or supplies.
- Give the vendor the Purchase Order number only; do not give the vendor a copy of Purchase Order.

- Instruct vendors to mail the original invoice directly to your property in care of Norris & Stevens; do not attach the invoice to the original Purchase Order.
- Copies of invoices, packing or delivery slips should be stapled behind corresponding Purchase Order in notebook; do not send these to Norris & Stevens.
- Voided Purchase Orders are to be treated in the same manner.
- Record the Purchase Order on the "Purchase Order Log".
- Scan and email the Purchase Order to your accountant and do not attach packing slips or invoice copies.

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PURCHASE ORDER LOG is used to recap all Purchase Orders written by On-Site Manager and the Asset Manager.

★ ★ ★

PURCHASE ORDER LOG

- Use this form to recap all Purchase Orders written by the On-Site Manager and Asset Manager.

★ ★ ★

VENDOR is any supplier of goods and services that is not an employee. Before a Purchase Order can be written to a new vendor, they must be authorized by Norris & Stevens. The required documentation must be submitted by the vendor or the On-Site Manager to the Asset Manager. Purchase Orders issued prior to vendor approval may not be honored.

Suppliers of Service or Products

- Must be pre-approved by the Asset Manager before providing service or products.
- Use suppliers as much as possible; limit the spending of petty cash.
- Use suppliers that are convenient and economical for the community; in most cases, they must permit charge accounts.

- Obtain and complete a commercial credit application; forward it to your Asset Manager for review and signature.

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Vendor List for each community will be provided by your Asset Manager or found in the "Building Notebook". Update the list regularly through the Asset Manager. Be sure to mark any vendor no longer authorized to provide services or products.

- Maintain a current approved vendor list in "Building Notebook."
- Obtain all necessary information from vendor including address, telephone number and contact person.
- Keep any vendor's website sign in information; property's username and password.

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Approving Invoices is the responsibility of the On-Site Manager immediately after any work has been completed and prior to payment.

- Inspect the work completed by the vendor and instruct the vendor to make corrections as necessary.
- Review the vendor invoice making sure it matches the work and amount requested on the Purchase Order, instruct the vendor to adjust the invoice, if necessary.
- Sign invoice after ensuring its correctness; missing signatures can delay payment.
- Only attach the invoice copy, packing or delivery slip to the Purchase Order retained in the "Purchase Order Notebook."
- The vendor is to submit the original invoice to your property at Norris & Stevens' address for payment; the On-Site Manager is *not* to mail the invoice in for the vendor.
- Missing Purchase Orders, incorrect vendor, dwelling number, or work authorized, unauthorized Purchase Order amount or lack of signature will delay or restrict payment of the vendor's invoices.

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BACK ORDERS are not to be accepted and payment to the vendor may be refused. If the item ordered is out of stock, cancel the order and purchase the item elsewhere, or wait to order it when the merchandise comes in. If a back order is allowed to be filled, there must be a corresponding Purchase Order (usually the original Purchase Order is attached to the first order and not available when the back order bill arrives).

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PETTY CASH is typically based upon the size of the community, and is stated in your employment agreement (refer back to the Purchase Order Limit on page 181), the vendors and charge accounts available, and the amount of office supplies required.

Initial Petty Cash Amount is issued separately to every On-Site Manager in an amount appropriate for the community and agreed upon by the Asset Manager at the time the employment contract is signed.

- The petty cash becomes the sole responsibility of the On-Site Manager.

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Location for keeping petty cash must be secure and not easily identifiable.

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PETTY CASH REQUESTS should be made as often as necessary, and never wait until the closing of the books. This will delay the check turn around.

- To ensure you have funds on hand when the situation arises, submit a petty cash reimbursement request when no more than one-half of your issued amount has been spent.
- Allow two (2) or more weeks for a replacement check to be processed.

Approved Expenditures are items used for normal dwelling turnover, office supplies, and other items less than \$25 per item. Most items above \$25 requires approval from the Asset Manager, if the item will be added to your inventory list at the property.

- Office supplies.
- Photocopies.
- Daily newspaper for advertising verification.
- FED filing fees.
- One time service charges like hauling Christmas trees away from the property.
- Postage.
- Repair and maintenance items when no commercial account exists or the purchase is below minimum.
- Gas and/or oil for landscape equipment; lawn mower, blower or edger.
- Resident retention items such as flowers and cards.
- Flowers for the office or exterior colorspots.

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Unapproved Expenditures

- Payment to casual laborers.
- Reimbursement to On-Site Manager for gas.
- Reimbursement to On-Site Manager for electricity.
- Payment to vendors.
- Memberships or subscriptions.
- Refunds for security deposits, rent, or applicant screening fees.

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Petty Cash Codes are used to separate expenditures by categories for reporting purposes.

- Include the account codes on every Petty Cash Request from the list provided.

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PETTY CASH REQUEST: Expenditures

- Use this request to replace petty cash money spent.
- The On-Site Manager is to complete this request.
- Enter the name of the community and the date of the request.
- Enter the name of the On-Site Manager and the period covered.
- Balance Carried Forward: Enter **ZERO (0)**.
- Cash Received: Enter the amount of your initial check (this amount is stated in your employment agreement), and the date it was received.
- Cash Requested: Enter **ZERO (0)** and no date.
- Beginning Balance/Amount of Fund: Enter the total of lines 1,2, and 3 which should equal the amount of your initial check.
- Date: Enter the item purchase date.
- Vendor/Store: Enter the name of the vendor.
- Description: Enter a brief description of the item or service purchased (do not use the name of the account code); separate items/service by account codes.

- Acct Code #: Enter the cash account code number listed on the petty cash envelope.
- Amount: Enter the amount of the single item or service.
- Total Receipts/Expenditures: Enter the total of all items or service listed.
- Ending Balance/Cash on Hand: Enter the difference between the beginning balance and the expenditures; this must equal your cash on hand.
- Organize all receipts in the order listed on the request; place all original receipts into the envelope and seal closed (items without a receipt will not be reimbursed).
- The On-Site Manager must sign and date the request.
- Make a copy for a file labeled "Petty Cash Requests".
- Send the original/envelope to Norris & Stevens whenever necessary.
- There is no need to send it to anyone's attention.

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RETURNING PETTY CASH occurs when an On-Site Manager leaves their position at the community. At such time, the total petty cash issued must be accounted for.

- The On-Site Manager and the Asset Manager must audit the petty cash account.
- Receipts and petty cash must be collected by the Asset Manager; the On-Site Manager is responsible for any missing funds.
- Any reimbursements or allowances owed to the On-Site Manager will be paid separately; deductions are not allowed to be reimbursed from petty cash.

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MEETING DEADLINES

Accounting Month ends on the 25th of the month except if that date falls on a weekend, it will be the Friday before. Your accountant will communicate with you, as to when all reports must be completed and emailed.

- Expect a phone call or email from your accountant as to the closing of the books.
- Close on-site books no later than the 25th.

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Rent Collection Period is the same as a month-to-month rental agreement, which is the calendar month. Rent is due on the 1st and late on the 6th. The Monthly Collection, however, is reported on the accounting month.

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Employee Pay Period is the calendar month with pay day on the 7th of the following month. The accounting month deadline is followed for submitting Earnings Requests and will limit the payment of painting, cleaning and miscellaneous work to this time period.

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REPORTS are necessary to meet owners' and governing agencies' requirements and their preparation should become a part of the daily, weekly and monthly routine.

Daily

- Make appropriate entries on Weekly Traffic Report from telephone calls and walk-ins.
- Make deposits daily and post to Skyline; print, scan and email batches to your accountant.
- Write Purchase Order Request as needed and email to your accountant.
- Upload resident move-in documents into Docs Box no later than five (5) days from the date the rental agreement or lease is signed.
- Submit resident move-out documents no later than seven (7) days from the actual move-out date or date of possession; in **WASHINGTON** submit documents within five (5) days.
- Make sure that residents who have move-out of the dwelling has also been moved out of Skyline the same day you take possession of the dwelling being vacated.
- Serve appropriate legal notices to residents with approval from your Asset Manager, and upload into Docs Box
- Submit Petty Cash Request as needed.

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Weekly provide the necessary documentation to track daily operations and to analyze areas where changes may be necessary.

- All community's work week begins on Friday and ends on Thursday.
- Complete Weekly Occupancy Report; email on Sunday to your Asset Manager.
- Complete Weekly Traffic Report; email on Sunday to your Asset Manager.
- Complete Weekly Make Ready Report; email on Sunday to your Asset Manager.
- Complete Purchase Order & Log and email weekly to your Asset Manager.
- Complete Weekly Time Sheets for all community employees to submit monthly.

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Monthly process all reports for payroll and Skyline.

- Complete Earnings Request & Reimbursement Request for each community employee as applicable and email on the 2nd Friday of each month to payroll@norris-stevens.com.
- Prepare billing in Skyline between the 26th and end of the month, for resident's rents.
- Print, scan and email billing summary and occupant open credit app reports to your accountant.
- Verify you have submitted all current month's Skyline batches.
- Verify you have submitted all current month's Skyline billing.
- Verify that all move-out files have been submitted according to our deadlines.
- Please refer any questions for the monthly billing and reports to you accountant.
- ▶ **Reminder:** You are required by law to keep the original printouts of your billing and batches for seven (7) years. Those documents must be available in the event of an audit.

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MAINTAINING RECORDS is as important as creating the report.

- Keep a copy of every report in the appropriate file.
- Reserve a space for *work in progress* on or near your desk; do not allow papers, files, etc. to pile up.

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MONTHLY CALENDAR						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
EVERY SUNDAY: Email Weekly Reports to your Asset Manager Traffic Vacancy	EVERY DAY: Deposit rent Update Skyline	Every Tuesday Asset Managers Division Meeting 10am – 12pm	Weekly Submit Purchase Orders to Accountants Weekly	1st of Each Month Rent Due	Move-out paperwork due within 7 days of apt possession (3 days in WA)	Schedule Walk-thru for all notices to Vacate
4th of Each Month Distribute Rent Reminders	5th of Each Month Last Day to Pay Rent Without Late Fee			8th of Each Month Send out Non-Payment of Rent Reminders (72-Hour Notices)	2nd Friday of Each Month: Payroll is Due: Email the complete Current Month	Schedule Vendors for all up-coming vacancies
	12th of Each Month Email 72-Hour Notices to Action Services			15th of Each Month Post “With Cause Notice” for \$\$ Owed		Market & Reserve up-coming vacancies
	Connect with Accountant re: Reports Due and Closing of the Books			Weed flower beds, sweep walkways, clean garbage enclosures		Oversee Vendors. Turn over vacancies in 3 days
25th of Each Month (Unless it falls on a weekend or holiday) Accountants “Close Property’s Books No Access to Skyline			Walk thru Ready to Rent Dwellings & Freshen up – Test Smoke Alarms etc...		Clean lights, signs, stairways. Check handrails and fire alarm systems	

HELPING RESIDENTS MOVE-OUT has as much to do with management success as helping them to move-in. We tend to neglect helping residents when they move-out because we are generally disappointed at their moving and could regard it as a type of desertion, and also because their moving is overshadowed by our simultaneous preparation for new residents (something easy to regard as more important).

- Helping to ensure a smooth move-out leaves the resident with a positive feeling about us.
- A satisfied former resident can be a valuable source of referrals and who may move back into your community at a later date.
- Most disputes occur when a resident moves-out because:
 - ▶ Of the time it takes for the resident to move-out.
 - ▶ The dwelling was not left in an acceptable condition according to management.
 - ▶ The residents left owing rent, damages, late fees, utilities, or other charges for which they are responsible.
 - ▶ Unauthorized persons took over the dwelling.
 - ▶ The security deposit refund was not returned promptly.
 - ▶ The resident disputes the charges on the final accounting for the security deposit.

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30-DAY NOTICE IN OREGON is to be completed in writing by every resident wishing to vacate their dwelling per the Landlord/Tenant Law and their rental agreement. Although the law does not prescribe a particular notice form, the Tenant's 30-Day Notice to Vacate is preferred.

- All residents intending to move must understand the 30-day period starts counting the day after the written notice has been received by the On-Site Manager; verbal notices are not acceptable; the purpose of the notice is to give the landlord adequate time to advertise and possibly re-rent the dwelling prior to the resident vacating.
- When residents give their notice and vacates early; it must be made clear they are responsible for the rent to the expiration of the notice or the date prior to the new resident's move-in date, whichever comes first.
- All rents must be paid by the residents to the expiration of the notice period at the time the notice is received by the On-Site Manager, or on the first day of the month the resident is vacating.

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Termination of Garage or Storage Unit should be mentioned on the written notice; but, all forms do not include this termination language.

- The resident should give a written notice to terminate garage or storage unit rental; this may be added to their notice to vacate.

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TENANT'S 30-DAY NOTICE TO VACATE IN OREGON

- Use this form when the resident(s) is giving the required 30-day notice to move.
- The resident(s) is to complete this form at least 30-days prior to vacating; *or* the On-Site Manager is to complete this form and attach it to the 30-day notice if it was written on any other form other than this Norris & Stevens form.

20-DAY NOTICE IN WASHINGTON is to be completed by every resident wishing to vacate their dwelling the Landlord/Tenant Law and their rental agreement. This notice must be received by the On-Site Manager on or before the 10th of the month. Any notice received after 11:59 p.m. on the 10th will require the tenant to pay for the next full month's rent; no matter what day they vacate.

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TENANT'S 20-DAY NOTICE TO VACATE IN WASHINGTON

- There is no particular form to provide to landlord in Washington; however the notice must be submitted in writing to landlord.
- The resident is to submit the notice on or before the 10th of the month.

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Roommates are defined as two or more persons occupying a dwelling together. Often times, one or more roommates decide to leave, and one or more decide to stay. Because the roommates moved in as an 'entity', a new contract may be necessary.

- All residents must sign the Add/Remove Roommate Addendum prior to vacating, indicating the name and date the resident is departing, and the name of all remaining residents.
- Departing roommate understands all deposits and fees are forfeited.

New roommate(s) must qualify as a new resident, by having them screened. They must fill out and sign a Rental Application and pay the \$50 screening fee. It should be understood that unqualified roommates are treated as guests and are restricted to 14-days and nights in a calendar year; or they become Unauthorized Occupants.

- All qualified residents must sign the new Add/Remove Roommate addendum; indicating the acknowledgement of the rental agreement, and accepting the move-in condition of the initial rental agreement. This form will need to be added to the existing resident file.

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Confirmation of Termination is used to restate the information received on a resident's 30-day notice, or otherwise make clear the move-out date and any pro-rated monies due by the resident(s).

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CONFIRMATION OF TERMINATION

- The On-Site Manager, or Assistant Manager is to complete this notice upon receiving resident's notice to vacate.
- Use this notice to confirm receipt of the notice to vacate given by the resident.
- This notice will confirm amount due from resident.

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Resident Move-Out Letter aids your line of communication with your departing resident.

- Give to the resident with the confirmation of the notice to vacate.
- Explains the move-out process.
- Reminds the resident to return any personal property, keys, etc.
- Reminds the resident to contact the utility company, and post office.

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MOVE-OUT INFORMATION NOTICE

- Use this notice to clarify the amount of money the resident owes, how to schedule an inspection, and how keys are to be returned.
- The On-Site Manager, or Assistant Manager is to complete this notice.

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Move-Out Checklist was designed to assist the departing resident in preparing their dwelling after they vacate.

- By using this checklist, a resident may receive more of the security deposit refund.

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RESIDENT MOVE-OUT CHECKLIST

- Use this checklist as a guide for the resident(s) when preparing their dwelling at move-out.
- The resident is to complete this checklist.

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Move-Out Survey can be used to determine why residents are moving, to make changes or improvements in services or amenities, or to analyze where the advertising dollar should be spent.

- Give a move-out survey to each vacating resident when you provide them with the confirmation notice.
- Request they be returned when the move-out inspection is being conducted.

- Surveys can randomly be mailed to previous residents to obtain a sampling at any given time.
- Although encouraged, it is not necessary for the resident to disclose their name.

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RESIDENT MOVE-OUT SURVEY

- Use this survey to determine why residents move.
- The resident(s) is to complete this survey and return it to the community or Norris & Stevens.
- Give the survey to each vacating resident(s); ask them to complete and return the form on or before their move-out day.
- When the survey is returned, file it in "Resident Surveys".

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TRANSFERS may occur within a community or between communities managed by Norris & Stevens, Inc. Transfers must be handled as a move-out and a move-in even though it is the same resident. Marketing efforts can be reduced if the residents that move-out, move to other Norris & Stevens' managed communities. Because of this, allowances or waivers are often given to those residents desiring to make a transfer. Each On-Site Manager should discuss the transfer policy with the Asset Manager to understand whether or not the applicant screening fees and deposits, if any, will be waived, before telling the resident who wishes to transfer what the policy is. Remember, the properties we manage have different owners who may have different management instructions for their properties.

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Within the Community transfers requires the availability of the desired dwelling, a notice from the resident, and approval by the Asset Manager. All or part of the notice period may be waived if the transfer is arranged by, or convenient to, the management.

- Transfer must be approved by Asset Manager.
- A home visit must be conducted prior to approving transfer to verify housekeeping habits.
- The resident file should be reviewed for derogatory information that may affect the resident transfer.
- If moving to a more expensive dwelling, use the screening process to verify income is adequate.

- Applications should be completed for all new roommates and/or relatives joining the household, and proper verifications made.
- Notify your Accountant of the resident transfer in Skyline.
- Complete a Check In/Out and Final Accounting of the dwelling vacating to move-out@norris-stevens.com within seven (7) days (OR), and five (5) days (WA).
- Collect new security deposit, as a new move-in.

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To Another Norris & Stevens Community

- The resident must give the required notice to vacate.
- Provide reference as requested to other Norris & Stevens community On-Site Manager.
- Process move-out as usual.

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From Another Norris & Stevens Community

- Charge the applicant screening fee unless specifically waived by Asset Manager.
- Process new application which will include rental reference from the current Norris & Stevens community on-site manager.
- Charge security deposit, if applicable, unless otherwise instructed by Asset Manager.
- Complete and execute rental agreement; create "Resident File" as usual.

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RESIDENTS WHO VACATE WITHOUT NOTICE are commonly referred to as "skips". These residents usually owe back rent and probably have incurred other charges as well.

- Walk the property daily to know the habits of your residents; do not rely on neighbors to report vacancies right away.
- The longer the time that elapses between the unreported move-out and the time it is discovered, the less likely the person is to be located and the money collected, and the longer the dwelling is likely to be off the market.
- After determining the dwelling has been abandoned, take over possession by changing or rotating the locks and conducting a move-out inspection. This is possession date.

- Inventory any personal belongings left behind and follow the procedures for abandoned property.
- Charge the allowable amount of \$35 per day storage in Oregon; the allowable amount in Washington is equivalent to the per diem prorated amount.
- Schedule turnover repairs and maintenance.
- Call utility companies to determine any monies due for which the landlord will be held responsible, and to obtain a forwarding address, if possible.
- Mail Abandoned Property Notice to the resident at the dwelling address marked "do not forward"; request an address correction.
- When the Notice returns with the address, if any, include it on the Final Accounting and Occupant Ledger; retain it in the "Resident's File".
- Notify your Accountant of the skip.
- Call potential sources of information on skips; this can confirm their move-out, provide a forwarding address to which the final accounting may be sent, or provide an address for the collection department.

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MOVE-OUT PROCEDURES

- Inspect the dwelling; use the Check In/Out original; if unavailable, use a new form.
- Collect all keys; refer to the Check In/Out done at move-in to confirm how many were issued and what type (entry, laundry, mailbox, storage, deadbolt, etc.).
- Obtain a forwarding address even if it is a temporary or emergency one.
- Confirm all utility companies, newspapers, and post office have been notified.
- Inform resident of any potential charges and when to expect their final accounting.
- If applicable: inventory all personal items left behind; mail Abandoned Property Notice.
- Schedule dwelling turnover; contact vendors and contractors.
- Refer to waiting list and/or make sure advertising is in place.
- Request your Asset Manager to inspect if major items need to be replaced such as carpet or vinyl.

- Complete the final accounting on the Check In/Out form and submit to move-out@norris-stevens.com within seven (7) days (OR) and five (5) days (WA) of termination and possession of the dwelling.

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Delivery of Possession occurs when the resident gives the landlord actual notice of the surrender of any right to occupy the dwelling to the exclusion of others.

- Returning the keys to the dwelling is considered actual notice.
- The landlord is entitled to possession when, under all circumstances, the landlord reasonably believes the resident has surrendered the dwelling or otherwise no longer claims the right to occupy the dwelling to the exclusion of others.
- The landlord can assume possession if the resident has abandoned the dwelling.

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Move-Out Inspection is required as part of the check in/out and final accounting. Whenever possible, the final inspection is to be performed with the vacating resident and the On-Site Manager. The management form serves as a guideline for assessing any damages or missing items in the dwelling, and for establishing the charges to be deducted from the resident's security deposit, if any.

- Compare the move-out inspection to the move-in inspection.
- Make charges for missing or damaged items; note damage beyond normal wear and tear.
- Your detail to entering the move-out information is as important as the move-in information.
- Complete the Check In/Out & Final Accounting with the resident by using "acceptable" and "deficiency note".
 - ▶ New is defined as being replaced during the last turnover process.
 - ▶ Almost New is defined as being replaced within the last year.
 - ▶ Acceptable condition allows for normal wear and tear to the dwelling and furnishings.
 - ▶ Deficiency Note is defined as any item missing, damaged by misuse or neglect, or destroyed; attempted repairs that do not meet our standards; walls that require painting for tenancy less than one (1) year; carpets that need cleaned for tenancies less than one (1) year; drapes or blinds that need cleaned for tenancies less than one (1) year; inoperable smoke detectors; garbage, debris, mold or filth left in the dwelling or appliances.

- ▶ When noting deficiencies under summary of condition, explain why it is deficient in the space provided.
- ▶ Do not get into an argument with the vacating resident.

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Secure the Vacated Dwelling by reclaiming all keys to the dwelling from the departing resident on the day of move-out.

- Prepare a maintenance request for all locks to be changed or rotated, even when all keys have been returned.
- Call the utility company to confirm the transfer of service.
- Pickup any newspapers or other advertisements delivered to the dwelling; call the newspaper if necessary.
- Inform the post office to stop or forward mail if it appears the resident has not done so.
- Keep the vacated dwelling locked to avoid vandalism.

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Forwarding Address for the resident is to be obtained before or upon move-out. The final accounting and/or abandoned property notice must be sent to the forwarding address, or if unknown, to the last known address (which may be the dwelling).

- Write the forwarding address on the Check-In/Out – Final Accounting before submitting it to Norris & Stevens move-out department.
- Update the forwarding address in Skyline.

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TURNOVER PROCESS is to be completed within 72 hours

Schedule Turnover on or before the move-out date. Make-ready should take no longer than three (3) working days.

- Be sure the heat is either turned very low (if freezing is imminent) or turned off; turn the water heater off at the circuit breaker panel box
- Use vendors as necessary to assure all vacated dwellings receive the proper attention and meet the turnover deadlines.
- Maintain a reliable list of vendors and contractors; do not rely on one cleaner or one painter to perform all your work.

- Conduct one (1) or two (2) in-progress inspections while the work is being done to ensure the quality of the workmanship and that nothing is being overlooked; conduct a final inspection prior to re-rent.
- Record completion dates on the Monthly Dwelling Make-Ready Report.

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FINAL ACCOUNTING must be completed in writing, and along with a refund, if any, must be in the hands of the resident within 31 days (OR) and 21 days (WA) of termination of the tenancy *and* delivery of possession to the landlord per ORS 90.300(6) & (7), and RCW 59.18.280(1).

- If an Oregon resident gives a 30-day notice, or a Washington resident gives a 20-day notice to move on the last day of the month:
 - ▶ And moves out as agreed; final accounting is due to the tenant by 31st day after move-out, and the 21st day in Washington.
 - ▶ If the landlord fails to comply with the accounting of a security deposit, or fails to return all or any portion of any prepaid rent or deposit due to the resident, the resident may recover the property and money due in an amount equal to twice the amount of the deposit/prepaid rent per ORS 90.300(8), and RCW 59.18.280(2).
- *First class mail is the most common delivery method for the final accounting; all final accounting must be mailed by the Accountant or Move-out Department to the previous resident no later than the 31st day after termination.*

Processing the Check In/Out and Final Accounting begins on the day of move-out or upon discovery the resident has vacated, skipped, or abandoned the dwelling.

- Compare the move-in and move-out comments; analyze areas of wear and tear; determine if they are normal.
- Immediately make arrangements for repairs and cleaning.
- Make charges for known routine types of damages such as missing screens, holes, etc.
- Obtain bids for work that is not routine such as repair/replacement of a vinyl floor, repair/replacement of an appliance part, repair/replacement of a door jamb, etc.
- Calculate charges from current price list located in the Rules and Regulations for Better Living (N&S Handbook), from a vendor, or from a bid for the work to be completed.
- Submit the Final Accounting to Norris & Stevens no later than seven (7) days (OR) and five (5) days (WA) from termination; this allows time for the form to be reviewed, approved, a refund check written, if applicable, and the final accounting mailed in a timely manner.

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CHECK IN/OUT & FINAL ACCOUNTING**Move-Out Inspection**

- Use the form completed when the resident(s) moved into the dwelling and add information indicating the condition in which the resident(s) left the dwelling at move-out.
- The On-Site Manager is to complete this form; complete a move-out inspection even when no move-in inspection was completed or available by using a Check-In/Out Final Accounting form.
- Schedule the inspection for a time when all items belonging to the resident(s) have been removed.
- Perform the inspection with the resident(s); or with a witness if the resident(s) is not available.
- Pay special attention to the condition of the carpet, vinyl, drapes, countertops, doors and casings, and appliances.
- Take photographs of the dwelling's condition and/or damages; put photos on a re-writable disc and place in file; use a ruler in the photo to provide a scale as to how large the hole or stain is; submit with final accounting to Norris & Stevens
- Inventory & Condition of the dwelling: Use the same codes as for the move-in inspection; **N**(ew), **A**(lmost) **N**(ew), **A**(cceptable), and **D**(eficient).
- Indicate whether or not all keys issued have been returned (dwelling, mailbox, garage, storage, other).
- Summary of condition at move out: Enter additional descriptive information to the codes listed under "inventory & condition of dwelling".
- Enter the forwarding address of the resident(s).
- The resident(s) is to sign and date the form.
- Type of Notice: Check ☐ Tenant's 30/20-day notice, ☐ No notice, ☐ Non-payment of rent notice, ☐ 30-day eviction, or ☐ Never took occupancy.
- Notice Received: Enter the date the notice was received or issued.
- To Vacate On: Enter the expiration of the notice (to vacate on).
- Actually Vacated On: Enter the date the resident(s) turned over possession of the dwelling, the date keys were turned in, the date after the date when under all circumstances it appears the resident(s) has vacated the dwelling, the date you took possession of the dwelling.
- Paid Thru: Enter the last date the rent paid, covers.

- Number Days Not Paid For: Enter the number of days occupied and rent was not paid, or the number of days remaining in the day notice to vacate of which rent was not paid. Calculate each full month as 30-days.
- Move Out Settlement - Tenant Charges: Compare the move-in inspection to the move-out inspection; enter charges for repairs, replacements, or turnover costs if the resident(s) occupied less than one 18 months; total all charges.
 - Determine total length of occupancy.
 - Charge for painting, cleaning carpets, or cleaning drapes if occupancy was less than 18 months.
 - Charge for any broken or missing items.
 - Charge for repair or replacement any item damaged as a result of the resident's neglect or irresponsibility.
 - Charge for removal of personal items and/or garbage.
 - Charge for unreturned keys.
- Move Out Settlement - Final Accounting: Enter the amount under deposits held; enter any credits; enter the total "tenant charges", unpaid rent, late fees, and any other charges (unpaid returned check fees, unpaid electric bills, court fees).
 - Total the amount of the resident(s) refund, if any.
 - Total the amount of the resident(s) charges, if any.
- Owner/Agent: Enter *NAME OF COMMUNITY/NORRIS & STEVENS, INC./YOUR SIGNATURE* and the date signed.
- Give the resident(s) their copy.
- Scan the original with the completed packet to move-out@norris-stevens.com within seven (7) days (OR) and five (5) days (WA).

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ABANDONED PROPERTY is determined under ORS 90.425, and RCW 59.18.310 which states:

- The landlord may dispose of any goods, motor vehicles or other personal property left upon the premises by the resident, after giving notice as required, in the following circumstances only:

- ▶ A tenancy terminates by expiration of a lease or surrender or abandonment of the premises and the provides written notification of relinquishing of the property.
- ▶ Provide a written inventory; record as miscellaneous flatware, not as "3" knives, "2" forks, and "7" spoons.

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Notice To Dispose of the resident's property must be given by the landlord in writing and shall be, per ORS 90.425, and RCW 59.18.310(2):

- Delivered personally or sent by first class mail.
- Addressed and mailed to the resident at the premises, any post office box held by the resident and known to the landlord, *and* the most recent forwarding address, if provided by the resident, or known to the landlord; the envelope *must* be marked "*Please Forward*".
- The notice must state that the property is considered abandoned and must be removed by the resident from the premises.
- The notice must specify a day not less than eight (8) days in Oregon, and forty-five (45) days in Washington after delivery of the notice or the property will be sold or otherwise disposed of.
- If the property is not removed the landlord may sell the property at a public or private sale.
- The property may be destroyed or otherwise disposed of, if the landlord reasonably determines that the value of the property is less than \$1,000 in Oregon and \$250 in Washington, or so low that the cost of storage and conducting a public sale probably exceeds the amount that would be realized from the sale.

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ABANDONED PROPERTY NOTICE IN OREGON

- Use this notice when the resident(s) that has vacated left their personal belongings behind.
- The On-Site Manager is to make copies of this notice. 1 copy to be mailed, 1 copy posted securely to the door, and 1 copy placed in “Resident File”
- Fill the notice out properly in Docs Box. (Date, names of resident(s), and complete address, name of community - all is automatically filled in when processing it through Docs Box)
- Enter the termination date which is 8-days from the date of the notice (this includes the 3 days mailing time), or enter the termination date 5-days from the date of the notice for personal delivery.
- Mail a copy to the resident(s) to the forwarding address or the dwelling address, if no forwarding address is available. Post a copy securely to the door, and keep a copy in the resident file.

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ABANDONED PROPERTY NOTICE IN WASHINGTON

- Use this notice when the resident(s) that has vacated left their personal belongings behind.
- The On-Site Manager is to make copies of this notice. 1 copy to be mailed, 1 copy posted securely to the door, and 1 copy placed in “Resident File”
- Fill the notice out properly in Docs Box. (Date, names of resident(s), and complete address, name of community - all is automatically filled in when processing it through Docs Box).
- Enter the termination date which is 45-days from the date of the notice is mailed or personally delivered to the tenant.

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Disposal means the landlord can dispose of the abandoned property by giving to an unrelated person or nonprofit organization.

- No consideration (payment) may be given for the property.
- The landlord **may not** retain the property for personal use.

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Storage of the abandoned property may be in the vacated dwelling, a storage unit on-site, or in a rented storage facility.

- Perishable food may be thrown away immediately.
- Animals must be given reasonable care given the circumstances; they may be turned over to the Humane Society, the county animal shelter, or other agency willing and able to care for such animals.
- Reasonable care shall be taken when handling and storing the abandoned goods.
- Storage costs accrue at the maximum rate of \$35 per day in Oregon and up to the daily dwelling rental amount in Washington (if listed on the notice); failing to serve the abandoned property notice timely can result in a delay in disposing of the property, loss of rents, or the addition of other costs such as handling and storage that cannot be charged against the resident.

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Resident Claim to the abandoned property must be made within the eight (8) days in Oregon and forty-five (45) days in Washington stated in the notice.

- If the resident responds in writing on or before the date specified to remove the property from the premises, and does not do so within the time specified in the notice, *or* within eight (8) days in Oregon, and forty-five (45) days in Washington after the delivery of the original notice, whichever is later, the property can conclusively be determined abandoned.
- If the resident responds and arranges to pick up their belongings, the On-Site Management must allow the resident to do so, even when monies are due for storage and handling.
- The resident must pick up their property by appointment and must be within fifteen (15) days from the date of the notice in Oregon, and forty-five (45) days from the date of notice in Washington.

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Sale of abandoned property will be arranged for by your Asset Manager.

- Proceeds of sale must be accounted for to the resident.
 - ▶ The landlord may deduct the reasonable cost of the notice, storage and sale, and any unpaid rent.
 - ▶ Any remaining proceeds after deductions to the landlord are made, must be returned to the resident.

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DWELLING MAKE-READY CHECKLIST

- Use this checklist to verify all areas of the turnover process were completed.
- The On-Site Manager, Assistant Manager or Maintenance Supervisor is to complete this checklist.
- Keep the original in the "Dwelling File".

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MAKE READY REPORT is to be used to track the progress of a dwelling which is turning over. By tracking the date cleaned, painted, and rent ready, all personnel will know the status of any available dwellings. Keep the current month's "Monthly Make-Ready Report" on an 8-1/2"x14" clipboard next to your desk out of the public's view.

- Use this report to schedule vendors, prospects, and inspections.
- This report is to be up-to-date and available for your Asset Manager's review.
- Dwellings are to be rent ready within three (3) days of move-out unless there are unusual circumstances; keep your Asset Manager updated.

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MONTHLY MAKE-READY REPORT**Former Residents**

- Use this report as a work-in-progress tracking sheet.
- The On-Site Manager, Assistant Manager or Leasing Agent is to complete this report.
- Repeat any incomplete entries from the previous month; this means the dwelling has not been re-rented *and* the new resident(s) has yet to move in.
- Make an entry upon receiving a notice from the resident(s), when a resident was issued a notice, when an FED has been filed on a non-payment of rent notice (indicate FED under "Date Notice Given") or when you discover a skip (indicate skip under "Date Notice Given").
- Enter the expiration of the 30-day notices; leave FEDs blank; for skips enter 30 days from the day the skip was discovered.
- Enter the actual move-out date (date you took possession).
- Confirm with the utility company the date the resident(s) discontinued electric service; enter date you notified electric company of move-out.
- Enter the current and re-rent dwelling rental rates.
- Enter the date the dwelling was painted, cleaned, and the carpet and blinds were cleaned (or replaced, if applicable); these dates must match the "Earnings Request", if an employee is requesting payment (complete in the order listed: Paint, clean, carpet).
- Enter the date all turnover has been completed and the dwelling is ready to show.

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MONTHLY MAKE-READY REPORT**New Residents**

- Enter the name of the new resident(s) after the application has been approved; the date the applicant screening fee was received; and the date the application was approved.
- Enter the dates the rental agreement and move-in inspection were signed.
- Enter date the electric company was notified of the new resident; confirm the date the resident(s) started service.
- Enter the *actual* move-in date of the new resident(s).
- Keep the copy in the file labeled "Monthly Make-Ready Report".
- Email the original to your Asset Manager with the other weekly reports.

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