

DOCUMENT RESUME

ED 107 976

CE 004 189

AUTHOR Bryan, James E.
 TITLE An Analysis of the Real Estate Property Managing Occupation.
 INSTITUTION Ohio State Dept. of Education, Columbus. Div. of Vocational Education.; Ohio State Univ., Columbus. Trade and Industrial Education Instructional Materials Lab.
 SPONS AGENCY Office of Education (DHEW), Washington, D.C.
 PUB DATE [75]
 NOTE 103p.; For related documents, see CE 004 160-188, CE 004 190-206, CE 004 263-268, and CE 004 425-427

EDRS PRICE MF-\$0.76 HC-\$5.70 PLUS POSTAGE
 DESCRIPTORS Communication Skills; Housing; *Job Analysis; Knowledge Level; *Managerial Occupations; *Occupational Information; *Real Estate Occupations; Safety; Skill Analysis; Skill Development; *Task Analysis; Task Performance; Work Attitudes
 IDENTIFIERS *Real Estate Property Managers

ABSTRACT

The general purpose of the occupational analysis is to provide workable, basic information dealing with the many and varied duties performed in the real estate property manager occupation. The document opens with a brief introduction followed by a job description. The bulk of the document is presented in table form. Eleven duties are broken down into a number of tasks and for each task a two-page table is presented, showing on the first page: tools, equipment, materials, objects acted upon; performance knowledge (related also to decisions, cues and errors); safety--hazard; and on the second page: science; math--number systems; and communications (performance modes, examples, and skills and concepts). The duties relate to: planning and purchasing residential rental projects in consultation with owners and developers; marketing, managing, and policy formation; responsibility for operating staff; advertising, promotion, and tenant relations; marketing and renting space; leases, renewals, and related problems; moving tenants; billing, collecting, and accounting for security deposits, etc.; developing tenant relations, service policies, and amenities; maintenance, repair and improvement; and administration, recordkeeping, and communications. A glossary of real estate terms is appended. (BP)

 * Documents acquired by ERIC include many informal unpublished *
 * materials not available from other sources. ERIC makes every effort *
 * to obtain the best copy available. nevertheless, items of marginal *
 * reproducibility are often encountered and this affects the quality *
 * of the microfiche and hardcopy reproductions ERIC makes available *
 * via the ERIC Document Reproduction Service (EDRS). EDRS is not *
 * responsible for the quality of the original document. Reproductions *
 * supplied by EDRS are the best that can be made from the original. *

Occupational Analysis

CE 004189

ED107976

REAL ESTATE PROPERTY MANAGER

N

U.S. DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION
THIS DOCUMENT HAS BEEN REPRO-
DUCED EXACTLY AS RECEIVED FROM
THE PERSON OR ORGANIZATION ORIGIN-
ATING IT. POINTS OF VIEW OR OPINIONS
STATED DO NOT NECESSARILY REPRESENT
OFFICIAL NATIONAL INSTITUTE OF
EDUCATION POSITION OR POLICY.

**Instructional Materials Laboratory
Grade and Industrial Education
The Ohio State University**

5235

2

AN ANALYSIS OF THE PROPERTY MANAGING OCCUPATION

Developed By

**James E. Bryan
Instructor, Real Estate and Marketing
Lima Technical College
Lima, Ohio**

**Occupational Analysis
E.P.D.A. Sub Project 73402
June 1, 1973 to December 30, 1974
Director: Tom L. Hinds
Coordinator: William L. Ashley**

**The Instructional Materials Laboratory
Trade and Industrial Education
The Ohio State University**

"The activity which is the subject of this report was supported in whole or in part by the U.S. Office of Education, Department of Health, Education, and Welfare. However, the opinions that are expressed herein do not reflect the position or policy of the U.S. Office of Education, and no official endorsement by the U.S. Office of Education should be inferred."

4

TABLE OF CONTENTS

Foreword		v
Preface		vii
Acknowledgment		ix
Job Description		xi
Duties		
A	Consulting with Owners and Developers in Planning New Residential Rental Projects or Purchase of Existing Projects	1
B	Mastering, Organizing, and Analyzing Pertinent Facts About Owner's Project and Competitive Rentals and Using These Facts in Marketing, Managing, and Policy Formation	11
C	Determining and Selecting the Staff and Contracting Groups Required to Operate the Complex	21
D	Advertising Ad Promoting Project Services, Public Relations Duties and Conducting Tenant Relations Programs	29
E	Marketing and Renting Space in New Project and Maintaining Optimum Occupancy Levels and Quality	37
F	Leasing, Renewal of Leases and Solving Problems Related to Terms of Lease and Riders	47
G	Moving Tenants In and Out of Apartments, Maintaining Good Will and Continuity of the Lease	55
H	Billing, Collecting, and Accounting for Security Deposits, Penalty Payments and Other Funds	63
I	Developing Tenant Relations and Service Policy and Provide Amenities as Planned	71
J	Maintaining, Repairing and Improving Project by Staff and Contractors	79
K	Administrating, Record Keeping, and Communications	93
Glossary		103

FOREWORD

The occupational analysis project was conducted by The Instructional Materials Laboratory, Trade and Industrial Education, The Ohio State University in conjunction with the State Department of Education, Division of Vocational Education pursuant to a grant from the U.S. Office of Education.

The Occupational Analysis project was proposed and conducted to train vocational educators in the techniques of making a comprehensive occupational analysis. Instructors were selected from Agriculture, Business, Distributive, Home Economics, and Trade and Industrial Education to gain experience in developing analysis documents for sixty-one different occupations. Representatives from Business, Industry, Medicine, and Education were involved with the vocational instructors in conducting the analysis process.

The project was conducted in three phases. Phase one involved the planning and development of the project strategies. The analysis process was based on sound principles of learning and behavior. Phase two was the identification, selection and orientation of all participants. The training and workshop sessions constituted the third phase. Two-week workshops were held during which teams of vocational instructors conducted an analysis of the occupations in which they had employment experience. The instructors were assisted by both occupational consultants and subject matter specialists.

The project resulted in producing one hundred two trained vocational instructors capable of conducting and assisting in a comprehensive analysis of various occupations. Occupational analysis data were generated for sixty-one occupations. The analysis included a statement of the various tasks performed in each occupation. For each task the following items were identified: tools and equipment; procedural knowledge; safety knowledge; concepts and skills of mathematics, science and communication needed for successful performance in the occupation. The analysis data provided a basis for generating instructional materials, course outlines, student performance objectives, criterion measures, as well as identifying specific supporting skills and knowledge in the academic subject areas.

PREFACE

In 1973 the Federal Division of Housing and Urban Development (HUD), informed a group of certified property managers that there were about twenty-five million residential rental units in the United States. This figure is expected to reach thirty-four million by 1980. Over four and one half million units will be Federally assisted (subsidized) rentals.

The expanded housing will generate a need for sixty thousand housing managers and two hundred thousand maintenance and clerical service personnel by 1980.* A center has been established to set standards, research techniques and accredit individuals.

Need for property managers expanded rapidly since World War II, because of increases in the number of absentee property owners and in the size of housing complexes. Government subsidies and changes in the social structure have encouraged the trend in specialized property managers.

Application of scientific property management techniques and training of people has been slow. The result has been generally poor management and delay in recognizing property management as a viable occupation.

Titles and definitions are also obscure. The National Association of Home Builders defines a property manager as:

"the direct representative of the management company (owners) and responsible for the apartment projects that have been assigned to him. He is responsible for the recruitment and training of all personnel in the projects, he is the vehicle for implementing all of the policies and procedures established by management. He is also directly responsible for: the appearance, maintenance, advertising, rental performance, problem solving, training new personnel, preparing budgets, maintain control of expenditures, and analyzing and reporting on budgeting deviations."

Other authorities define property managers as advisors in investment property or specialists in the marketing of residential rental properties. Regardless of title, the role

of the property manager is not generally understood. Except in states where real estate licenses are required for leasing, there is no formal license required and certification agencies do not have legal status.

The actual duties of a property manager vary widely between regions, cities, and employers. The size of the project managed has a strong bearing on managers' duties. Low income housing has unique management problems.

The following duties analyzed are based on the more progressive, practices of relatively large projects that favor the scientific approach. Property managers in these projects generally depend on staff or contractors to perform most of the tasks.

Many owners and developers regard professional property managers as too expensive. They hire lower level employees directly and perform many of the supervisory or administrative functions. Many of the tasks outlined are performed by people whose general titles include resident manager, rental agent, assistant resident manager, maintenance engineer, janitorial staff, maintenance and repair specialist, and ground specialists.

Responsibilities of people with these titles overlap so completely that it is impractical to assign responsibility. The object of this analysis is to describe a series of duties which, if properly conducted, should result in successful residential complexes.

With minor changes many of the descriptions apply to property managers working on government supported complexes or for private owners.

Duties of property managers of commercial or industrial complexes, vary considerably from those of residential property managers. These variations are beyond the scope of this analysis.

The duties of property managers are becoming recognized as requiring the full time, dedicated attention of a personable business person trained in good sales technique.

* Source: A study by the National Corporation for Housing Partnerships sponsored by HUD.

ACKNOWLEDGMENT

We wish to acknowledge the valuable assistance rendered by the following subject matter specialists. They provided input to the vocational instructors in identifying related skills and concepts of each respective subject matter area and served as training assistants in the analysis process during the two-week workshops.

Rollin M. Barber, Psychology
The Ohio State University
Columbus, Ohio

Glenn Mann, Communications
Columbus, Ohio

Jodi Beittel, Communications
Columbus, Ohio

Jerry McDonald, Physical Sciences
Columbus Technical Institute
Reynoldsburg, Ohio

Diana L. Buckeye, Mathematics
University of Michigan
Avon Lake, Ohio

Colleen Osinski, Psychology
Columbus Technical Institute
Columbus, Ohio

Rick Fien, Chemistry
The Ohio State University
Beachwood, Ohio

David Porteous, Communications
University of Connecticut
Colchester, Connecticut

N. S. Gidwani, Chemistry
Columbus Technical Institute
Columbus, Ohio

James A. Sherlock, Communications
Columbus Technical Institute
Columbus, Ohio

Bruce A. Hull, Biology
The Ohio State University
Columbus, Ohio

Jim VanArsdall, Mathematics
Worthington High School
Worthington, Ohio

Donald L. Hyatt, Physics
Worthington High School
Worthington, Ohio

Lillian Yontz, Biology
The Ohio State University
Caldwell, Ohio

The following individuals are acknowledged for their organizational assistance in identifying and coordinating the vocational instructors and consultants in Distributive Education.

Cathy Ashmore, Director
Distributive Education Instructional
Materials Laboratory
Columbus, Ohio

James R. Gleason
Indian Hills High School
Cincinnati, Ohio

Acknowledgment is extended to the following I.M.;L. staff members for their role in conducting the workshops; editing, revising, proofing and typing the analyses.

Faith Justice	Research Associate
Sheila Nelson	Administrative Assistant
Marsha Opritza	Editorial Consultant
Rita Buccilla	Typist
Peg Bushelman	Typist
Carol Fausnaugh	Typist
Mindy Fausnaugh	Typist
Rita Hastings	Typist
Carol Hicks	Typist
Sue Holsinger	Typist
Barbara Hughes	Typist
Carol Marvin	Typist
Patti Nye	Typist
Kathy Roediger	Typist
Mary Salay	Typist

JOB DESCRIPTION

A property manager is an agent of the owner of residential rental property. His/her duties are to consult with the owners on the planning and/or purchase of investment properties, and on the selection and acquisition of marketable apartment complexes.

On existing units, the resident property manager is generally vested with responsibility for all phases of the operations, including general administration, and maintenance of the physical plant. In some complexes leasing or deposits and rents may be handled by outside agencies.

The property manager is generally under contract, frequently on a percentage basis. Frequent communication between the resident manager and the owner or owner's business agent is vital.

11

xi

Duty A

**Consulting with Owners and Developers in Planning New Residential
Rental Projects or Purchase of Existing Projects**

- 1** Guide owner in initial planning of project
- 2** Advise owner on rental market, costs, and ratios
- 3** Analyze and help specific locations, sites, and types of facilities
for project
- 4** Assist in financial planning related to project

(TASK STATEMENT) GUIDE OWNER IN INITIAL PLANNING OF PROJECT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
<p>Library on real estate and property management</p> <p>Access to association files and news letters</p> <p>Office equipped for statistical analysis: secretary, calculator, supplies</p> <p>Familiarity with government subsidies and policy</p> <p>Working forms (e.g. leases, contracts, etc.)</p>	<p>Conduct basic research on national and local rental market</p> <p>Define projects acceptable to owner and market</p> <p>Study real estate offerings of land and buildings</p> <p>Select geographic area or city</p> <p>Select type of tenant or project or market segment desired</p> <p>Estimate operating income under alternate conditions</p>	
<p><u>DECISIONS</u></p> <p>Determine if economic trends are favorable or unfavorable</p> <p>Determine size and scope of project -- that fits owners resources</p> <p>Determine whether to build or buy</p> <p>Identify several acceptable complexes</p>	<p><u>CUES</u></p> <p>Occupancy rates of rental units</p> <p>New building starts</p> <p>Relative strength of buyers and sellers</p> <p>General level of economy</p> <p>Profits or losses of existing owners</p> <p>Unserved or highly profitable market segment</p> <p>Ratios of building or operating costs to prevailing rents</p>	<p><u>ERRORS</u></p> <p>Estimates of rental income too high</p> <p>Costs not realistic</p> <p>Selecting overbuilt area for start</p> <p>Market selected too wide or vague</p> <p>Too much faith in secondary information</p>

(TASK STATEMENT) GUIDE OWNER IN INITIAL PLANNING OF PROJECT

<p>SCIENCE</p> <p>Principles of economics Principles of business and finance Exhibit the capacity to act in an analytical manner Aptitude for thorough research Geography and land characteristics Ability to analyze tax data and interpret tax schedules</p>	<p>MATH – NUMBER SYSTEMS</p>
	<p>Basic math skills with reference to: problem solving, percentages, cost ratios, and comparable numbers</p> <p>Ratio and proportion Estimation [forecast cost and income]</p> <p>Use of computing devices and mechanical aids calculators: mechanical and electrical</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Reading</p> <p>Writing</p> <p>Viewing</p>	<p><u>EXAMPLES</u></p> <p>Analytical reports and charts written on desirable sites or desirable new complexes Trade journals Research report on size and quality of the market Correspondence to owners or brokers with property for sale Statistics on the performance of complex owners or complexes under development Competitive complexes or examples of new techniques</p> <p><u>SKILLS/CONCEPTS</u></p> <p>Comprehension, detail/inference, terminology: real estate, finance, accounting, and building trades Terminology, general vocabulary, and logic</p> <p>Visual analysis, logic, recognition of symbols, codes, and emblems</p>

(TASK STATEMENT)

ADVISE OWNER ON RENTAL MARKET, COSTS, AND RATIOS

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON

Rental surveys on local prospects
Association cost-rent ratios
Community income data
Profile of tenants (present or planned)
Written owner's objectives
Local zoning codes
Tax information
Appropriate reference manuals

PERFORMANCE KNOWLEDGE

Examine rental surveys and competitive rentals
Consider existing rentals or planned construction of units
Compare location, service, and image of your project or proposal with competitive offers
Advise on rent levels and profitability

SAFETY - HAZARD

DECISIONS

Determine strength of demand for rentals
Select architectural style, apartment mix
Determine which of several plans will suit owners, non-economic image
Determine whether to build or buy; or to postpone decision
Determine whether to hire agent to start up rentals or to do own work

CUES

Rent levels for apartments of various characteristics
Vacancies in existing properties
Prospects or waiting list as determined by inquiries or surveys
Up-to-date costs and ratios

ERRORS

Chosen rent too high or too low
Wrong market in terms of area selected and tenant profile
Failure to invest in promotion or reliable counsel

TASK STATEMENT) ADVISE OWNER ON RENTAL MARKET, COSTS, AND RATIOS

SCIENCE	MATH - NUMBER SYSTEMS
<p>Professional management must be familiar with principles of:</p> <ul style="list-style-type: none"> psychology sociology human behavior law economics finance accounting taxes insurance education 	<p>Basic Arithmetic Skills and Concepts Fundamental Operations (Calculation) Addition, subtraction, multiplication and division algorithms Ratio and proportion [vacancy rates] Estimation Use of computing devices and mechanical aid calculators: electrical and mechanical Rule of thumb</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking</p> <p>Writing</p> <p>Reading</p>	<p><u>EXAMPLES</u></p> <p>Owner and developer furnished details on project operating cost and cash flow</p> <p>Operating reports Standard forms Letters for advertising and promotion</p> <p>Local papers Local papers Trade publications</p> <p><u>SKILLS/CONCEPTS</u></p> <p>Persuasion and sales technique Logic Terminology Poise</p> <p>Informational reports Logic Terminology Business letters (format/content)</p> <p>Comprehension Description, definition</p>

(TASK STATEMENT) ANALYZE AND HELP SPECIFIC LOCATIONS, SITES, AND TYPES OF FACILITIES FOR PROJECT

<p>TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON</p>	<p>PERFORMANCE KNOWLEDGE</p>	<p>SAFETY -- HAZARD</p>
<p>Real estate listings and comparables Plat book or maps of vicinity Zoning data Current appraisals of property Neighborhood rental survey Chamber of Commerce data on: shopping facilities, recreation, schools Statistics on government subsidies Predictions of local trends Blueprints or development plans</p>	<p>Work with local brokers and study real estate offerings Provide several sites or projects for owners inspection Study neighborhood and city rental patterns Study the tenant profile</p>	<p>Excessive dedication to detail at expense of the overall picture Hidden defects or obsolete information Decaying neighborhoods Overpriced property</p>
<p><u>DECISIONS</u> Choose experienced advisors Select and recommend one of several projects Select resident manager</p>	<p><u>CUES</u> Reputation and experience of broker Profit and loss statements of operators Compatibility of neighborhood with tenant profile Accessibility of utilities and service Services available in vicinity</p>	<p><u>ERRORS</u> Deteriorating neighborhood Price too high Timing may be poor Terms of sale too vague Failure to prorate expenses and income during transition</p>

TASK STATEMENT) ANALYZE AND HELP SELECT LOCATIONS, SITES, AND TYPES OF FACILITIES FOR PROJECT

<p>SCIENCE</p> <p>Knowledge of behavior sciences Awareness of rapid changes in values, public acceptance of life styles Knowledge of tax structures Understand profit and loss statements</p>	<p>MATH - NUMBER SYSTEMS</p> <p>Basic math skills with reference to: problem solving, percentages, cost ratios, and comparable numbers Use of computing devices and mechanical aids calculators: electrical and mechanical Ratio and proportion Estimation [total costs] Use of numbers (without calculation): indexing and ratio</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Reading Writing Viewing Speaking</p>	<p><u>EXAMPLES</u></p> <p>Analytical reports and charts Bank reports Appraisals Offers or counter proposals on property Statistics Properties for sale Negotiating with sales people Hiring contractors</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Comprehension, detail/inference, terminology: real estate, finance, accounting, and building trades Terminology, general vocabulary, and logic Visual analysis, logic, recognition of symbols, codes, and emblems</p>	

(TASK STATEMENT) ASSIST IN FINANCIAL PLANNING RELATED TO PROJECT

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON

Local sources of finance: private investors,
and/or loan officers of bank
Accounting system for project
Publications on finance and real estate

PERFORMANCE KNOWLEDGE

Plan cash outlay consistent with expected in-
come
Prepare a list of assets and expected improve-
ments
Retain accountants to keep expense and tax
records; set up the system
Plan cash flow of project
Meet with owner and developer
Review lease terms and expiration date

SAFETY -- HAZARD

DECISIONS

Decide to operate site as is or to add
improvements
Select depreciation schedules and other
accounting guidelines

CUES

Refer to cost ratios experienced by similar
operations
Records of former owner of existing project
Average cost ratios available for most items
Insurance program

ERRORS

Failure to exhaust opportunities to borrow
at lower rates
Long term commitments in face of changing
finance structure and rising costs

TASK STATEMENT) ASSIST IN FINANCIAL PLANNING RELATED TO PROJECT

<p>SCIENCE</p> <p>Principle of business finances Accounting principles</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Set of real numbers Fractions/decimals Finding a percent of a number and what percent one number is of another Ratio and proportion Estimation Use of computing devices and mechanical aids calculators: electrical and mechanical</p>
---	--

COMMUNICATIONS

<p><u>PERFORMANCE MODES</u></p> <p>Writing</p> <p>Speaking</p>	<p><u>EXAMPLES</u></p> <p>Prepare conventional balance sheets Profit and loss statements Procedures for leasing, rent collection, etc Forecast of expected earnings or deficit Confer with owner and accountants</p>	<p><u>SKILLS/CONCEPTS</u></p> <p>Terminology General vocabulary Logic Terminology, enunciation, clarity of expression, logic, poise</p>
--	--	---

Duty B

Mastering, Organizing, and Analyzing Pertinent Facts About Owner's Project and Competitive Rentals and Using These Facts in Marketing, Managing, and Policy Formation

- 1** Compile information on own and competitive projects' services
- 2** Prepare vital statistics and outline the advantages of the project
- 3** Develop and distribute merchandising and public relations materials
- 4** Study tenant profile and compare to market plan

(TASK STATEMENT) COMPILE INFORMATION ON OWN AND COMPETITIVE PROJECTS' SERVICES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
<p>General area information: Road networks Transportation - bus stops Schools - all levels Churches Shopping areas - special stores Recreation center Specific facilities: Rent schedules Number and types of apartments Structural style - soundness Square footage offered - closet space Basic equipment and benefits Units occupied and vacant (visual) Units under construction Utility service and costs</p>	<p>Confer with developer or former owner on construction details Acquire up-to-date maps and drawings of grounds and access roads Prepare information sheets on local services and facilities Contact competitors and offer services Keep records of tenant activities</p>	
<p><u>DECISIONS</u></p> <p>Determine details required to suit needs Select appropriate material for advertising</p>	<p><u>CUES</u></p> <p>Types of questions asked by tenant and owner Problems of contractors or utility companies Advertising copy needs Depreciation data</p>	<p><u>ERRORS</u></p> <p>Too little data can cause loss of prospects, poor job performance, or excessive delays in getting work done Insufficient and/or inappropriate advertising</p>

TASK STATEMENT) COMPILE INFORMATION ON OWN AND COMPETITIVE PROJECTS' SERVICES

<p>Consumer motivation</p>	<p>SCIENCE</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Read and interpret tables, charts, and/or graphs Basic arithmetic skills and concepts: Rule of thumb Basic measurement skills and concepts:</p>
<p>COMMUNICATIONS</p>		
<p>Writing</p> <p>Reading</p>	<p><u>PERFORMANCE MODES</u></p> <p>Chamber of Commerce School Board or city</p> <p>City maps News released Community organization Commercial reports</p> <p>42</p>	<p><u>SKILLS/CONCEPTS</u></p> <p>Spelling, business letter, terminology, clarity of expression, and logic</p> <p>Comprehension, detail/inference, definition, recognize symbols, codes, and emblems</p>

(TASK STATEMENT) PREPARE VITAL STATISTICS AND OUTLINE THE ADVANTAGES OF THE PROJECT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
<p>Rental agent Guidelines from the Institute of Real Estate Management Plot of property and main thoroughfares Room count and varying rate Parking facilities and ease of access Record of refrigerators, stoves, disposals, air-conditioners and other commodities Sample social calendar List of tenant activities</p>	<p>Analyze the product offerer: for rent Present periodic analysis to owner with suggestions for improvement Keep vital statistics and profile of tenants Become familiar with equipment brands, warranties, and quality Send summary of reports to owner</p>	
<p><u>DECISIONS</u> Determine if project creates a favorable first impression Determine if a specific improvement will generate more income than it will cost</p>	<p><u>CUES</u> Outsider's reaction to complete services Number of qualified prospects that do not sign Response to check list of apartment features</p>	<p><u>ERRORS</u> Personal bias -- failure to keep open mind Failure to invite teamwork</p>

TASK STATEMENT) PREPARE VITAL STATISTICS AND OUTLINE THE ADVANTAGES OF THE PROJECT

<p>SCIENCE</p> <p>Consumer psychology Motivation studies</p>	<p>MATH – NUMBER SYSTEMS</p>
<p>Basic math skills Finding a percent of a number and what percent one number is of another Ratio and proportion Estimation Rule of thumb Properties of the real number system commutative (order) associative (grouping)</p>	
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking Writing</p>	<p><u>EXAMPLES</u></p> <p>Interview suppliers and contractors and deduct factual information from conflicting data Reports to owner Advertising copy</p>
	<p><u>SKILLS/CONCEPTS</u></p> <p>Terminology, clarity of expression, logic, and poise Spelling, description, terminology, clarity of expression, logic, and persuasion and sales technique</p>

(TASK STATEMENT) DEVELOP AND DISTRIBUTE MERCHANDISING AND PUBLIC RELATIONS MATERIALS

<p>TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON</p> <p>Materials: brochures, calling cards, publicity releases, and pictures of property Architect's plans Construction details Maps of access streets Fact book on project Newcomer's guide book</p>	<p>PERFORMANCE KNOWLEDGE</p> <p>Prepare publicity materials Write advertising copy Ask for cooperation of advertising media Acquaint employees with facts Place information in newcomer's kit Add to external appeal with landscaping signs, etc.</p>	<p>SAFETY – HAZARD</p>
<p>DECISIONS</p> <p>Determine need for advertising improvements and/or advantages</p>	<p>CUES</p> <p>Tenant's evaluation of appeals of project; appeals relative to competition and criticism</p>	<p>ERRORS</p> <p>Hidden costs</p>

TASK STATEMENT) DEVELOP AND DISTRIBUTE MERCHANDISING AND PUBLIC RELATIONS MATERIALS

<p style="text-align: center;">SCIENCE</p>	<p style="text-align: center;">MATH -- NUMBER SYSTEMS</p>
<p>Principles of merchandising and promotion</p>	<p>Fundamental operations (calculation) Addition algorithm Subtraction algorithm Multiplication algorithm Division algorithm Order of operations, i.e., use of parentheses in simplifying arithmetic expressions</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking</p> <p>Writing</p>	<p style="text-align: center;"><u>EXAMPLES</u></p> <p>Consult with knowledgeable merchandising persons Staff meetings Drafts of ads and/or booklets</p> <p style="text-align: center;"><u>SKILLS/CONCEPTS</u></p> <p>Terminology, clarity of expression, logic, poise</p> <p>Spelling, description, persuasion and sales technique, logic</p>

(TASK STATEMENT) STUDY TENANT PROFILE AND COMPARE TO MARKET PLAN

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
<p>Association data on tenant profile Managers handbook Part-time interviewers</p>	<p>Review tenant profile compared to com- petition Meet and know as many tenants as possible Work on building prospect list Review selling techniques for lack of emphasis on correct appeals Provide statistics on breakdown and projection of number of school age children to local school board</p>	
<p><u>DECISIONS</u></p> <p>Select for tenant profile: income levels age preference ideal family status pets permitted or barred singles or marrieds</p>	<p><u>CUES</u></p> <p>Compare to ideal profile Examine list in light of expected vacancies Group structure and interaction Rental application</p>	<p><u>ERRORS</u></p> <p>Admit prospect that does not fit profile Failure to maintain desirable profile could damage long term prospects of high occupancy</p>

TASK STATEMENT) STUDY TENANT PROFILE AND COMPARE TO MARKET PLAN

<p>SCIENCE</p> <p>Observation, and interviewing skills Analytical skills Sampling procedures designed to avoid bias</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Finding a percent of a number and what percent one number is of another Constructing a balancing matrix showing tenant profile for: each building each floor apartment price range apartment size</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking Reading Writing</p>	<p><u>EXAMPLES</u></p> <p>Conversation with sample of tenants Questionnaire filled out by new families Records of survey results and trends Data from questionnaire</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Appropriate diction, clarity of expression, poise Comprehension, detail/inference Spelling, classification, description, reports, logic</p>	

Duty C

Determining and Selecting the Staff and Contracting Groups Required to Operate the Complex

- 1 Determine and classify number of personnel needed**
- 2 Recruit, train, and control on-site workers**
- 3 Select, supervise, and pay off-site service people, contractors, and suppliers**



(TASK STATEMENT) DETERMINE AND CLASSIFY NUMBER OF PERSONNEL NEEDED

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
<p>Sample job descriptions Pay scales Local employment agencies Maintenance manuals Local pay scales Labor laws (federal and local)</p>	<p>Study administrative and maintenance requirements Set performance standards Prepare a check list for interviewing prospects Conduct interviews Keep records of contract agreements, hours, paid vacation, sick leave, etc.</p>	<p>Correct classifications may not be available within limit of budget</p>
<p><u>DECISIONS</u></p> <p>Determine correct allocation of on-site and off-site help Determine relative use of staff and contract labor Consider incentive pay scales</p>	<p><u>CUES</u></p> <p>Type quality and age of appliances Type of heating and cooling equipment Extent of landscaping and need for snow removal Rent levels and services associated Gross income and number of rental units</p>	<p><u>ERRORS</u></p> <p>Improper pay scale Select wrong skills or employees that are incompatible with tenants Substandard work Understaffed Inappropriate allocation of duties</p>

TASK STATEMENT) DETERMINE AND CLASSIFY NUMBER OF PERSONNEL NEEDED

<p>Personnel management skills Work control procedures</p>	<p>SCIENCE</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Basics Finding a percent of a number and what percent one number is of another Ratio and proportion Estimation Rule of thumb Use of numbers (without calculation)</p>
<p>COMMUNICATIONS</p>		
<p>Reading</p> <p>Writing</p>	<p><u>PERFORMANCE MODES</u></p> <p>Trade magazines Maintenance manuals Job descriptions Contracts Summaries Reports to tax agencies, social security, etc.</p>	<p><u>SKILLS/CONCEPTS</u></p> <p>Comprehension, detail/inference, informational reports, and terminology Spelling, classification, description, terminology/general vocabulary, clarity of expression, and denotative/connotative words</p>

(TASK STATEMENT) RECRUIT, TRAIN, AND CONTROL ON-SITE WORKERS**TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON**

Contacts with other property managers
 Employment agencies
 Newspaper advertisements
 Job descriptions
 Housekeeping and laundry equipment
 Home appliances
 Labor legislation
 Application forms

PERFORMANCE KNOWLEDGE

Check budget to determine maximum size of payroll
 Prepare contracts on appropriate jobs
 Obtain prospects by advertising
 Interview and screen respondents
 Train on the job
 Provide work schedules and time sheets
 Set up quality control and incentive program
 Schedule necessary work by day, week, and month
 Enforce regulations and agreements
 Provide discipline where needed
 Keep records

SAFETY -- HAZARD

Maintain first aid facilities
 Have a contract with a physician

DECISIONS

Determine terms of contract
 Determine structure and level of pay
 Determine fringe benefits
 Determine whether to hire experienced help or train raw recruits

CUES

Recruiting patterns
 Ease of location and prospects
 Personal appearance or personality, skills
 Pay scale
 Travel time

ERRORS

High labor turnover
 Failure to give clear picture of duties
 Unqualified workers hired
 Lack of incentive
 Low performance expectations
 High training costs
 Dishonest employees
 Failure to pay on time

TASK STATEMENT) RECRUIT, TRAIN, AND CONTROL ON-SITE WORKERS

<p>SCIENCE</p> <p>Principles of training techniques Capacity to judge competence and integrity of both semi-skilled and unskilled workers Ability to generate team work</p>	<p>MATH – NUMBER SYSTEMS</p> <p>Basic math and algorithms Use of numbers (without calculation) Counting Fundamental operations (calculation) Addition algorithm Subtraction algorithm Multiplication algorithm Division algorithm Order of operations, i.e., use of parentheses in simplifying arithmetic expressions Finding a percent of a number and what percent one number is of another Ratio and proportion Estimation Rule of thumb</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Writing Speaking</p>	<p><u>EXAMPLES</u></p> <p>Advertising for prospects Interviewing to measure skills and build confidence Teaching skills to create functional group</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Spelling, classification, clarity of expression Diction, implying, persuasion, logic, poise</p>	

(TASK STATEMENT) SELECT, SUPERVISE, AND PAY OFF-SITE SERVICE PEOPLE, CONTRACTORS, AND SUPPLIERS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY – HAZARD
<p>Association recommendations Legal advice Maintenance manuals guaranties File of warranties or guaranties that are still in effect Billing and payout procedures Emergency funds Essential parts and supplies inventory</p>	<p>Survey service and maintenance needs Study bids or schedules of charges Select contractors or specialists and draw up agreements and forms Inform employees and tenants who to call and procedures for securing help Have bills approved by manager paid by owner Inspect all work before paying Keep records including drawings of changes when work is hidden by walls or masonry Establish more than one source for each type of service or supply</p>	<p>Establish emergency procedures Secure emergency services</p>
<p><u>DECISIONS</u></p> <p>Determine whether to put contractor on retainer or pay by job basis Assign responsibility to employee or contractor Discriminate between owner responsibilities and tenant's responsibilities Select contractors</p>	<p><u>CUES</u></p> <p>Experienced in residential work Type of service call Consultation with other property managers Promptness of contractor Estimates Competitive bids Contractor's record</p>	<p><u>ERRORS</u></p> <p>Poor quality work Excessive cost Unanswered service call</p>

TASK STATEMENT) SELECT, SUPERVISE, AND PAY OFF-SITE SERVICE PEOPLE, CONTRACTORS, AND SUPPLIERS

<p>SCIENCE</p>	<p>MATH - NUMBER SYSTEMS</p>
<p>Contracting and negotiation skills Mechanical aptitude</p>	<p>Finding a percent of a number and what percent one number is of another Ratio and proportion [percentage and interest] Estimation Rule of thumb</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking Listening Writing Viewing</p>	<p><u>EXAMPLES</u></p> <p>Delivering oral instructions to contractors and employees Local inspectors Priority list of services (i.e. snow clearance, trash pick-up, window washing, etc.) Inspect for preventative maintenance</p> <p>27</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Terminology, enunciation, clarity of expression, logic, usage Auditory discrimination, concentration, note taking Classification, denotation/connotation, logic Visual analysis, detail and inference</p>	

Duty D

**Advertising Ad Promoting Project Services, Public Relations Duties
and Conducting Tenant Relations Programs**

- 1 Structure or modify new project, or existing project**
- 2 Advertise and promote new project construction or acquisition**
- 3 Communicate with prospects, tenants, general public employees
and owners**

(TASK STATEMENT) STRUCTURE OR MODIFY NEW PROJECT, OR EXISTING PROJECT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
<p>Promotion features: modern architecture landscaping recreational activities permanent signs outside lighting (including flood lights)</p>	<p>Provide for basic tenant needs in quality manner Plan amenities comparable with rent levels Include some striking or unusual features Write trial advertising or promotion plans before spending money on facilities Check plans with most desirable tenants</p>	
<p><u>DECISIONS</u></p> <p>Pick image desired</p> <p>Budget resources</p> <p>Select consultants</p>	<p><u>CUES</u></p> <p>Shelter magazines Advanced architecture journals Maximum return Successful competitors Local lumber yards Materials suppliers</p>	<p><u>ERRORS</u></p> <p>Services that may have to be withdrawn Contrary to planned image Excessive cost Unusable plans Excessive time</p>

TASK STATEMENT) STRUCTURE OR MODIFY NEW PROJECT, OR EXISTING PROJECT

<p>SCIENCE</p>	<p>MATH - NUMBER SYSTEMS</p>
<p>Marketing principles Aesthetics</p>	<p>Basic arithmetic skills and concepts Reduction of fractions Changing mixed numbers to improper fractions Changing percents to fractions and fractions to percents Finding a percent of a number and what percent one number is of another Changing fractions to decimals and decimals to fractions Ratio and proportion Estimation Rounding off decimals and whole numbers Approximation using scientific notation Guess and check method Rule of thumb Property of comparison : equality/equivalence, inequality/greater than/less than</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Writing Speaking Listening</p>	<p><u>EXAMPLES</u></p> <p>Advertising Public relations personnel Consultant advice</p> <p>31</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Description, persuasion and sales technique, logic, usage Clarity of expression Auditory discrimination, concentration, logic, note taking</p>	

(TASK STATEMENT) ADVERTISE AND PROMOTE NEW PROJECT CONSTRUCTION OR ACQUISITION

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
<p>Advertising agencies Telephone directory Newspapers Window signs Outdoor on-site signs</p>	<p>Keep advertisement in yellow pages Place advertisements and/or promotions in local newspaper Consider your tenants a prime target Put on special opening promotions for rent-up period Use project signs and lighting Keep records of inquiries</p>	
<p><u>DECISIONS</u></p> <p>Consider using real estate brokers or rent services Determine amount to be spent Select proper media</p>	<p><u>CUES</u></p> <p>Competitor's records of response trade Visitor information Budget allocations</p>	<p><u>ERRORS</u></p> <p>Poor response to advertisements Excessive cost for poor return</p>

ADVERTISE AND PROMOTE NEW PROJECT CONSTRUCTION OR ACQUISITION

TASK STATEMENT

MATH -- NUMBER SYSTEMS

SCIENCE

Behavioral science
 Understanding the advertising process, e.g.,
 attention
 awareness of need
 educate prospects
 guide selection to particular merchandise
 sale closing techniques

Basic arithmetic

COMMUNICATIONS

PERFORMANCE MODES

Writing

Speaking

EXAMPLES

Advertisements for:
 newspaper
 radio

Prospective tenants

SKILLS/CONCEPTS

Spelling
 Classification
 Description
 Clarity of expression
 Persuasion and sales technique
 Logic
 Appropriate diction, clarity of expression,
 persuasion and sales technique

(TASK STATEMENT) COMMUNICATE WITH PROSPECTS, TENANTS, GENERAL PUBLIC EMPLOYEES AND OWNERS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
<p>Social groups in complex Memberships in civic groups Neighborhood rental surveys</p>	<p>Define project strength and most likely source of prospects Plan open house, parties or special activities that will bring prospects in Send newspaper stories about project or tenants when it appears acceptable Develop public image Encourage employees to help recruit Offer rewards for new tenants Publish newsletter</p>	
<p><u>DECISIONS</u></p> <p>Determine most appropriate promotion activity Determine where terminating tenants find new space and study benefits of these projects</p>	<p><u>CUES</u></p> <p>Type of property or rental Relative cost Volume and type of communication</p>	<p><u>ERRORS</u></p> <p>Slow moving properties Too much publicity - "circus" atmosphere</p>

ASK STATEMENT) COMMUNICATE WITH PROSPECTS, TENANTS, GENERAL PUBLIC EMPLOYEES AND OWNERS

<p>Public relations skills Entertainment</p>	<p>MATH – NUMBER SYSTEMS</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Writing</p> <p>Speaking</p>	<p><u>EXAMPLES</u></p> <p>News releasing In-house paper Bulletin board notices Tenant gathering</p> <p><u>SKILLS/CONCEPTS</u></p> <p>General vocabulary, clarity of expression, persuasion and sales technique</p> <p>Appropriate diction, enunciation, dress, facial and body features, poise</p> <p>35</p>

Duty E

**Marketing and Renting Space in New Project and Maintaining Optimum
Occupancy Levels and Quality**

- 1 Create and maintain rent roll, vacancy statistics, and tenant profile
- 2 Organize sales presentation and application procedures
- 3 Select and show model apartment
- 4 Screen applications and select most desirable

44

37

(TASK STATEMENT) CREATE AND MAINTAIN RENT ROLL, VACANCY STATISTICS, AND TENANT PROFILE

<p>TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON</p> <p>Rent roll statistics (own and community) Market information from other cities Trained interviewers Advertising copy and mailing pieces Newspapers Radio stations</p>	<p>PERFORMANCE KNOWLEDGE</p> <p>Determine and compare vacancy level and the vacancy level of competition Keep inventory records of current and expected vacancies Examine prospect lists and sources of prospects for desirable tenants Place advertisements or alert rental agents to start intensive selling if necessary</p>	<p>SAFETY -- HAZARD</p>
<p><u>DECISIONS</u></p> <p>Determine how many applications to consider vacancy Determine when it pays to relax standards</p>	<p><u>CUES</u></p> <p>Update of rent rolls Percentage of vacancies</p>	
		<p><u>ERRORS</u></p> <p>Too many vacancies Undesirable tenants</p>

(TASK STATEMENT) CREATE AND MAINTAIN RENT ROLL, VACANCY STATISTICS, AND TENANT PROFILE

SCIENCE	MATH -- NUMBER SYSTEMS
<p>Basic arithmetic skills and concepts Statistical analysis Averages</p>	
COMMUNICATIONS	
<p><u>PERFORMANCE MODES</u></p> <p>Writing</p> <p>Reading</p>	<p><u>EXAMPLES</u></p> <p>Advertisements Records Prospect lists Other managers' reports</p> <p>39</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Clarity of expression, persuasion and sales technique, penmanship, classification, report, logic</p> <p>Comprehension, detail/inference, description</p>	

(TASK STATEMENT) ORGANIZE SALES PRESENTATION AND APPLICATION PROCEDURES

47

<p>TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON</p> <p>Tenant applications Basic data on project Prepared leases</p>	<p>PERFORMANCE KNOWLEDGE</p> <p>Organize sales presentation around amenities Set up appointments — explain project, and accept applications Plan number of interviews and select interviewer Observe appearance, manners and performance Plan promotions to precede heavy rental drives</p>	<p>SAFETY — HAZARD</p>
<p>DECISIONS</p> <p>Determine market demand Determine vacancies Select apartments to show</p>	<p>CUES</p> <p>The economy; response to advertising; information from other managers Neatness Availability</p>	<p>ERRORS</p> <p>Low inquiry rate; too many vacancies Unattended prospect Dissatisfied prospect</p>

ORGANIZE SALES PRESENTATION AND APPLICATION PROCEDURES

TASK STATEMENT

<p>SCIENCE</p> <p>Persuasion and sales techniques Exhibit qualities of professionalism</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking Viewing</p>	<p><u>EXAMPLES</u></p> <p>Taking applications Explain to prospect Inspect interviewer and prospect</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>General vocabulary, clarity of expression, persuasion and sales technique, poise Visual analysis, detail and inference, logic</p>	<p>41</p>

(TASK STATEMENT) SELECT AND SHOW MODEL APARTMENT

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY - HAZARD
<p>Model apartments - empty or furnished Furnishings for model apartment Brochures printed for occasion Intensive sales presentation in print Prospect list and/or referrals Application forms Form letter for acceptance or rejection</p>	<p>Select one or more model apartments Clean, furnish, and maintain model apartment Prepare intensive sales presentation Show apartment and project as a unit Keep project clean, neat, and ready for display Follow up undecided prospects Secure confirmation</p>	
<p><u>DECISIONS</u></p> <p>Determine if model is to be temporary or permanent; the apartment of manager or tenant</p>	<p><u>CUES</u></p> <p>Space available, condition apartment, money available for furnishings</p>	<p><u>ERRORS</u></p> <p>Model unavailable or unsuitable for showing (e.g., dirty walls, drafts, marks on walls, broken equipment, etc)</p>

TASK STATEMENT) SELECT AND SHOW MODEL APARTMENT

<p>SCIENCE</p>	<p>MATH -- NUMBER SYSTEMS</p>
-----------------------	--------------------------------------

COMMUNICATIONS

<p><u>PERFORMANCE MODES</u></p> <p>Speaking Viewing Writing</p>	<p><u>EXAMPLES</u></p> <p>Semi-formal presentation Visual impressions Written follow up</p> <p style="text-align: right;">43</p>	<p><u>SKILLS/CONCEPTS</u></p> <p>Clarity of expression, persuasion and sales technique, poise Visual analysis, detail and inference, logic Spelling, classification, description</p>
---	--	--

(TASK STATEMENT) SCREEN APPLICATIONS AND SELECT MOST DESIRABLE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY — HAZARD
<p>Application forms Credit bureau contract [Letters or phone calls to references] Clerical help Brochures on complex Calling cards Completed application from waiting list</p>	<p>Use applications and interview notes to check applicant Arrange a second visit for most desirable prospects Ask questions about prospects' needs If applicant is looking for better facilities of or lower rents or if applicant cannot be served now, refer to other complex Obtain a credit rating for prospect If rejected applicant has some appeal, put in reserve</p>	
<p><u>DECISIONS</u> Determine strictness of and criteria for screening Determine whether to cooperate with competitors for mutual benefit Determine alternate sales clinchers</p>	<p><u>CUES</u> Income, credit rating, occupation, neighborhood</p>	<p><u>ERRORS</u> Loss of desirable tenant</p>

TASK STATEMENT) SCREEN APPLICATIONS AND SELECT MOST DESIRABLE

<p>SCIENCE</p> <p>Exhibit capacity to ascertain personal qualities Exhibit capacity to listen openly and attentively Exhibit qualities of tact, poise, consideration, graciousness and imagination</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking Listening Viewing</p>	<p><u>EXAMPLES</u></p> <p>Interview prospects Explain lease and qualifications Prospect's answers to interview questions Prospect's appearance</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>General vocabulary, enunciation, poise Discriminate facts from non-facts, concentration, note taking Visual analysis, detail and inference, logic</p>	<p>45</p> <p>52</p>

Duty F

**Leasing, Renewal of Leases and Solving Problems Related to Terms
of Lease and Riders**

- 1 Select terms of general lease and add riders
- 2 Negotiate lease and explain covenants and riders to prospect
- 3 Record and file lease form for reference, renewal, and possible
use

53

(TASK STATEMENT) SELECT TERMS OF GENERAL LEASE AND ADD RIDERS

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON

General lease approved by owner's lawyer
Form letters on lease violations

PERFORMANCE KNOWLEDGE

Select general lease provisions to prepare form
Advertise covenants necessary to specify extent and amount of service
Describe service and tenants obligations
Cover specials — pets, children, causes for termination
Include clear provisions for renewal

SAFETY -- HAZARD

DECISIONS

Select correct form
Determine length of lease
Determine deposit required
Determine when terms are violated
Determine strictness of enforcement

CUES

Competitor's terms, standard guidelines, legal needs
Termination date from rent roll
Check against lease terms
Circumstances of violation

ERRORS

Omitting critical points from lease
Neglecting to get signature
Misunderstanding of terms
Unnecessary threats of legal action
Fostering uncooperative attitude in tenant

(TASK STATEMENT) SELECT TERMS OF GENERAL LEASE AND ADD RIDERS

<p>SCIENCE</p> <p>Exhibit capacity to engender clear statement of rationale Exhibit qualities of tact, poise, consideration, consciousness and imagination</p>	<p>MATH — NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts Changing percents to fractions and fractions to percents Finding a percent of a number and what percent one number is of another</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Reading Writing</p>	<p><u>EXAMPLES</u></p> <p>Lease forms Legal requirements Lease terms</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Comprehension, detail and inference, informational reports, definition, terminology Spelling, description, clarity of expression, logic, usage</p>	
<p>49</p>	

(TASK STATEMENT) NEGOTIATE LEASE AND EXPLAIN COVENANTS AND RIDERS TO PROSPECT

<p>TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON</p> <p>Lease forms approved by owner Strong box for temporary storage of leases and deposit of money Covenants (agreements to abide by certain rules and regulations mentioned in lease) Riders (additions to lease)</p>	<p>PERFORMANCE KNOWLEDGE</p> <p>Convince tenant that lease is of mutual benefit Clearly explain meaning of covenants Discuss special or unusual features of leases Obtain deposit Obtain tenant's signature on lease</p>	<p>SAFETY - HAZARD</p>
<p><u>DECISIONS</u></p> <p>Determine if concessions to tenants are necessary to obtain signature</p>	<p><u>CUES</u></p> <p>Consumer and tenant laws Tenant hints about small rebates -- painting apartments, etc.</p>	<p><u>ERRORS</u></p> <p>Misunderstanding of terms</p>

56

TASK STATEMENT) NEGOTIATE LEASE AND EXPLAIN COVENANTS AND RIDERS TO PROSPECT

<p>SCIENCE</p> <p>Exhibit capacity to listen openly and attentively Exhibit qualities of tact, poise, consideration, graciousness, and imagination Maintain capacity to foster cooperation and cope with conflict behavior</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts Reduction of fractions Finding a percent of a number and what percent one number is of another</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking Reading</p>	<p><u>EXAMPLES</u></p> <p>Explain lease to prospects Terms of lease</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>General vocabulary, clarity of expression, persuasion and sales technique, poise Comprehension, detail and inference, proposal, definition, terminology</p>	<p style="text-align: right;">51</p>

(TASK STATEMENT) RECORD AND FILE LEASES FOR REFERENCE, RENEWAL, AND POSSIBLE USE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
Permanent files in office Standard cards Rent roll Records of expiration dates and special provisions	Enter statistics on rent roll File lease and record expiration date Recover and renew expired leases Summarize rents and expiration dates on monthly report to owner	Use fireproof storage for records, leases, files, etc
<u>DECISIONS</u> Determine termination or renew lease; strict or lax enforcement; add new riders	<u>CUES</u> Records of expiration date Possible legal action	<u>ERRORS</u> Failure to use leased could result in cyclic rentals with changing economy and seasons

TASK STATEMENT) RECORD AND FILE LEASE FORM FOR REFERENCE, RENEWAL, AND POSSIBLE USE

<p>Accounting, record keeping</p>	<p>SCIENCE</p>	<p>MATH - NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts</p>
<p>COMMUNICATIONS</p>		
<p><u>PERFORMANCE MODES</u></p> <p>Writing</p>	<p><u>EXAMPLES</u></p> <p>Internal records Report to owner</p>	<p><u>SKILLS/CONCEPTS</u></p> <p>Penmanship, spelling, classification, informational reports, clarity of expression, logic</p>

Duty G

Moving Tenants In and Out of Apartments, Maintaining Good Will,
and Continuity of the Lease

- 1 Inspect and repair vacant apartments
- 2 Schedule move-in, greet tenant, and provide necessary equipment
- 3 Schedule move-outs, inspect for security refund, and estimate
cost of refurbishing

60

(TASK STATEMENT) INSPECT AND REPAIR VACANT APARTMENTS

61

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON

Employees' handbook
 Standard renovating procedures for unoccupied apartments
 Staff members and contractors assigned to this function
 Hand tools for basic carpentry, basic electrical work, and minor repairs on heating, plumbing, and masonry
 Reference of reliable contractors
 Local health and safety codes

PERFORMANCE KNOWLEDGE

Keep records of vacancy dates
 Examine damage reports and prepare service request
 Perform routine maintenance and possible improvements
 Record time renewed apartment will be ready, and cost figures
 Inspect before new occupant moves in
 Contract for necessary repairs
 Store tools and equipment
 Have changes examined by local inspectors

SAFETY -- HAZARD

DECISIONS

Determine extent of damage -- frequency of repair
 Determine whether to convert to furnished facility
 Estimate extent of tenant liability for damage to apartment

CUES

Lease expiration dates, notices to vacate apartment sent
 Rent roll forms should inform of empties and room count
 Time since last overhaul
 Lease terms

ERRORS

Failure to renovate promptly could cost rental income
 Sloppy job may cost good will of new tenant

(TASK STATEMENT) INSPECT AND REPAIR VACANT APARTMENTS

<p>SCIENCE</p> <p>Basic knowledge of building trades (i.e. carpentry, electrical wiring, masonry, etc)</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts Reduction of fractions Changing mixed numbers to improper fractions Changing percents to fractions and fractions to percents</p>
---	--

COMMUNICATIONS

<p><u>PERFORMANCE MODES</u></p> <p>Writing</p> <p>Reading</p> <p>Viewing</p>	<p><u>EXAMPLES</u></p> <p>Instructions on work request form Reports on damage Estimates Tax reports</p> <p>Local codes Recommendations Inspect apartment and work</p> <p style="text-align: center;">57</p>	<p><u>SKILLS/CONCEPTS</u></p> <p>Penmanship Spelling Classification Terminology Clarity of expression Comprehension, detail and inference, definition, terminology Visual analysis, detail and inference, recognize symbols, codes and emblems</p>
--	--	--

(TASK STATEMENT) SCHEDULE MOVE-IN, GREET TENANT, AND PROVIDE NECESSARY EQUIPMENT

**TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON**

Receipt for keys, pool passes, and books
 Important telephone number lists
 Community guides
 Newcomer books
 Appliance operating instructions
 Newsletters of complex
 Social schedules of complex
 Sample set of community rules

PERFORMANCE KNOWLEDGE

Inform new tenant of day of the move-in and record date
 Warn new tenant about utility transfer
 Meet tenant on move-in day — deliver and get receipt for keys, identification cards, etc.
 Give tenant verbal and printed information on the community services
 Instruct new tenant in emergency procedures
 Instruct new tenant in rent paying procedures
 Introduce new people to other tenants
 Record event and continue relations with tenant

SAFETY - HAZARD

Arrange for minimum interruption to traffic pattern

DECISIONS

Determine schedule for moves
 Determine assistance needed for moves

CUES

Communication with rental agent and/or office
 Out-of-town move-ins need more help

ERRORS

Too many move-ins on one day causes congestion and inconvenience
 No provisions for removal of debris

TASK STATEMENT) SCHEDULE MOVE-IN, GREET TENANT, AND PROVIDE NECESSARY EQUIPMENT

<p>MATH -- NUMBER SYSTEMS</p>	<p>Basic arithmetic skills and concepts</p>
<p>SCIENCE</p>	<p>Exhibit qualities of tact, poise, consideration, graciousness and imagination Maintain capacity to foster cooperation and cope with conflict behavior Grant appropriate regard for tenant's unique needs</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking Writing</p>	<p><u>EXAMPLES</u></p> <p>Instructing tenant Record move</p> <p><u>SKILLS/CONCEPTS</u></p> <p>General vocabulary, clarity of expression, poise Penmanship, classification, logic</p> <p>59</p>

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
<p>Eviction forms Damage check list Forms requesting repair and refinishing</p>	<p>Be aware of move-out dates and control if possible Pre-inspect at time of notice and at move-out time Make estimate of damage and record Pay security money not needed for damages within prescribed time Record vacant unit and prepare to refurbish Obtain forwarding address from old tenant</p>	<p></p>
<p><u>DECISIONS</u></p> <p>Determine amount of damage Determine amount of security needed to cover damages</p>	<p><u>CUES</u></p> <p>Paint condition, refurbishing, appliances Damage estimates Unpaid utilities</p>	<p><u>ERRORS</u></p> <p>Over or under estimate costs</p>

TASK STATEMENT) SCHEDULE MOVE-OUTS, INSPECT FOR SECURITY REFUND, AND ESTIMATE COST OF REFURBISHING

<p style="text-align: center;">SCIENCE</p> <p>Grant concious attention to smoothly flowing teamwork</p>	<p style="text-align: center;">MATH - NUMBER SYSTEMS</p>
	<p>Basic arithmetic skills and concepts Reduction of fractions Changing mixed numbers to improper fractions Changing percents to fractions and fractions to percents Finding a percent of a number and what percent one number is of another Changing fractions to decimals and decimals to fractions Ratio and proportion Estimation Rounding off decimals and whole numbers Approximation using scientific notation Guess and check method Rule of thumb Property of comparison equality/ equivalence inequality/greater than/less than</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Reading Viewing</p>	<p><u>EXAMPLES</u></p> <p>Forms, files, estimates of damage Inspecting apartment</p> <p style="text-align: right;">61</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Comprehension, detail and inference, description, definition, terminology Visual analysis, detail and inference, describing logic, color discrimination</p>	

Duty H

Billing, Collecting, and Accounting for Security Deposits, Penalty Payments and Other Funds

- 1 Comply with legal and owner's policy on rents and service**
- 2 Collect and deposit rent and follow-up delinquent tenants**
- 3 Develop tenant relations and service policy**

67

(TASK STATEMENT) COMPLY WITH LEGAL AND OWNERS POLICY ON RENTS AND SERVICE

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON

Tenant record cards
Resident manager's handbook (RMH)
Legal interpretation of the terms of lease

PERFORMANCE KNOWLEDGE

Keep separate file of tenants slow pay or delinquent on rent
Study recommendations of owner's lawyer
Read trade press on subsidized housing rent strikes and evictions
Keep communications with tenant in writing

SAFETY -- HAZARD

DECISIONS

Determine individual tenant needs and problems
Determine action to be taken on delinquent accounts

CUES

Terms of lease, tenant laws
Small children indicate danger in court
Low income
Hardship case
Record of delinquent rents

ERRORS

Legal suits
Impaired cash flow

<p>SCIENCE</p> <p>Exhibit qualities of tact, poise, consideration, graciousness and imagination Maintain capacity to foster cooperation and cope with conflict behavior</p>	<p>MATH -- NUMBER SYSTEMS</p>
	<p>Basic arithmetic skills and concepts Reduction of fractions Changing mixed numbers to improper fractions Changing percents to fractions and fractions to percents Finding a percent of a number and what percent one number is of another Changing fractions to decimals and decimals to fractions Ratio and proportion Estimation Rounding off decimals and whole numbers Approximation using scientific notation Guess and check method Rule of thumb Property of comparison equality/equivalence inequality/greater than/less than</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Reading</p> <p>Writing</p>	<p><u>EXAMPLES</u></p> <p>Trade press Records Lease terms Communications to tenant Reports to owner</p>
	<p><u>SKILLS/CONCEPTS</u></p> <p>Comprehension, detail/inference, informational reports, terminology Spelling, reports, terminology, clarity of expression, logic</p>
<p>65</p>	

(TASK STATEMENT) COLLECT AND DEPOSIT RENT AND FOLLOW-UP DELINQUENT TENANTS

7A

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS, ACTED UPON

PERFORMANCE KNOWLEDGE

SAFETY - HAZARD

Forms:
rent bills
rent report
Delinquent notices
Central receiving point box

Establish simple billing and collecting procedures
Be firm with slow paying or delinquent tenants
Set delinquency date (seventh month) and collect penalty after that date
Report irregular occurrences to owner or agent
Send monthly rent summary and itemized account of delinquent rents to owner
Visit delinquent tenants

DECISIONS

Determine due dates, methods of collection
Determine when delinquent tenant is classified as "hardship case" and given more time

CUES

Lease terms
Convenience
Change of job
Job layoff
Strikes
Unusual medical expenses

ERRORS

Delinquent accounts
Legal suits
Endangered cash flow
Undue or additional hardship on tenant

TASK STATEMENT) COLLECT AND DEPOSIT RENT AND FOLLOW-UP DELINQUENT TENANTS

<p>SCIENCE</p> <p>Maintain regard for differing views on maximum efficiency of the operation Exhibit capacity to engender clear statement of rationale Exhibit qualities of tact, poise, consideration, graciousness and imagination</p>	<p>MATH - NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts Reduction of fractions Changing mixed numbers to improper fractions Changing percents to fractions and fractions to percents Finding a percent of a number and what percent one number is of another Changing fractions to decimals and decimals to fractions Ratio and proportion Estimation Rounding off decimals and whole numbers Approximation using scientific notation Guess and check method Rule of thumb Property of comparison equality/equivalence inequality/greater than/less than</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Writing Speaking</p>	<p><u>EXAMPLES</u></p> <p>Letters of notice or rent bills Visiting delinquent tenants</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Spelling, business letters, general vocabulary, clarity of expression, logic General vocabulary, implying, clarity of expression, logic, facial and body features, poise</p>	
<p>67</p>	

(TASK STATEMENT) DEVELOP TENANT RELATIONS AND SERVICE POLICY

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON

Office staff
Personal calls
Form letters

SAFETY -- HAZARD

PERFORMANCE KNOWLEDGE

Confer with owner to determine your decision area and special service budget
Be sure to understand owner's and tenant's lease obligations
Act as an arbitrator between owner and tenant (explain policy)
Stay within carefully planned budget
Know tenants when possible
Respond promptly to complaints
Clean and supervise common area and clubroom
Cooperate with civic groups and newspapers

DECISIONS

Determine service policy (e.g. club rooms, outdoor recreation, special transportation, etc)

CUES

Complaint levels, vacancies, budget, older facilities

ERRORS

Unhappy tenants, tenant union, or consumer action

TASK STATEMENT) DEVELOP TENANT RELATIONS AND SERVICE POLICY

<p style="text-align: center;">SCIENCE</p> <p>Exhibit capacity to engender clear statement of rationale Exhibit qualities of tact, poise, consideration, graciousness and imagination Grant conscious attention to smoothly flowing teamwork Grant appropriate regard for tenant's unique needs</p>	<p style="text-align: center;">MATH – NUMBER SYSTEMS</p> <p>Accounting and basic math</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Writing Speaking</p>	<p><u>EXAMPLES</u></p> <p>Bulletin boards, newsletters Social groups Answer telephone complaints</p> <p style="text-align: right;">69</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Spelling, memo format, clarity of expression General vocabulary, clarity of expression, poise</p>	

Duty I

Developing Tenant Relations and Service Policy and Provide Amenities as Planned

- 1 Provide for emergencies, safety, and security maintenance
- 2 Program social and recreational activities sponsored by complex
- 3 Provide service and maintenance to individual apartments and common areas

74

71

74

(TASK STATEMENT) PROVIDE FOR EMERGENCIES, SAFETY, AND SECURITY MAINTENANCE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON

List of emergency phone numbers
 Knowledge of community services
 Simple first aid kits
 Emergency fire-fighting equipment
 Stretchers and blankets
 Police report forms to be filled out by all tenants
 Bulletin boards
 Exit and safety signs

PERFORMANCE KNOWLEDGE

Provide tenants with phone numbers and instructions for emergency requests
 Keep responsible party on premises at all times to make decisions
 Be prompt and courteous but do not allow tenant to take advantage of good will emergency service
 Carry liability and comprehensive insurance for owner's protection
 Explain the importance of safety to tenant and build safety into the complex
 Larger projects hire security guards — keep in touch with the police and/or place security agency on contract
 Plan and enforce a safe traffic and parking pattern
 Plan and enforce recreation area (including pools) safety rules

SAFETY ... HAZARD

Follow all standard safety and health codes
 Establish traffic patterns, snow removal, parking areas
 Provide adequate outside and common area lighting
 Maintain integrity of security system (i.e. no duplicate keys passed out to unauthorized persons, change of locks, etc)

DECISIONS

Determine emergency, safety, and security procedures
 Determine method of dissemination of information

CUES

Publications, laws, and ordinances
 Bulletin boards, flyers, demonstrations

ERRORS

Legal liability
 Unaware tenants

ASK STATEMENT) PROVIDE FOR EMERGENCIES, SAFETY, AND SECURITY MAINTENANCE

<p>SCIENCE</p> <p>Maintain capacity to function efficiently when encountering fast changing multiple, personal or situational variables Exhibit qualities of self-confidence, self-control, self-reliance, self-respect, and adaptability Exhibit capacity to ascertain best service for particular needs of the tenants</p>	<p>MATH – NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Writing Speaking</p>	<p><u>EXAMPLES</u></p> <p>Bulletin board notices, flyers Explain procedures to tenants</p> <p><u>SKILLS/CONCEPTS</u></p> <p>Spelling, clarity of expression, description, logic, general vocabulary General vocabulary, clarity of expression, logic poise</p>

(TASK STATEMENT) PROGRAM SOCIAL AND RECREATIONAL ACTIVITIES SPONSORED BY COMPLEX

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
<p>Tenant organizations Social director Recreation hall Club room Outdoor sports facilities</p>	<p>Starting with existing facilities, build active program in cooperation with tenant Budget printed material, secretarial help, and possibly refreshments Publish rules, firm dates, and possibly an annual calendar of events Gain maximum free publicity for project name Keep careful records of cash outlay</p>	<p>Follow standard safety regulations for recreation areas</p>
<p><u>DECISIONS</u></p> <p>Determine programs Determine amount of budget for program Determine which programs to keep</p>	<p><u>CUES</u></p> <p>Tenant profile Social leaders in project Tenant surveys</p>	<p><u>ERRORS</u></p> <p>Unsatisfied tenants Too much supervision needed Poor attendance</p>

(TASK STATEMENT) PROGRAM SOCIAL AND RECREATIONAL ACTIVITIES SPONSORED BY COMPLEX

<p style="text-align: center;">SCIENCE</p> <p>Maintain capacity to function efficiently when encountering fast changing multiple, personal or situational variables Exhibit qualities of self-confidence, self-control, self-reliance, self-respect, and adaptability Exhibit capacity to ascertain best service for the particular needs of the tenants</p>	<p style="text-align: center;">MATH – NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Writing Reading</p>	<p style="text-align: center;"><u>EXAMPLES</u></p> <p>Schedule and publish activities and dates Tenant surveys and profile</p>
<p style="text-align: center;"><u>SKILLS/CONCEPTS</u></p> <p>Spelling, classification, clarity of expression Comprehension, detail and inference, informational reports</p>	<p>75</p>

(TASK STATEMENT) PROVIDE SERVICE AND MAINTENANCE TO INDIVIDUAL APARTMENTS AND COMMON AREAS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON

Project managers should have easy access to tools and operating manuals for:
basic carpentry
basic electrical repair
minor plumbing and heating repairs
maintenance shop
minor painting and touch-up
project vehicles and equipment

PERFORMANCE KNOWLEDGE

Inform all tenants of their responsibilities
Do necessary work promptly
Keep records of individual service paid or non-paid
Be neat, agreeable, and courteous while working
Be firm in not over-doing services
Help tenants find service people for work not covered by terms of lease
Practice preventative maintenance on vacant apartments

SAFETY - HAZARD

Follow all safety and health standards

DECISIONS

Determine need to change or improve service

Determine whether to replace or repair defective equipment

CUES

Complaint levels
Vacancies
Tenant turnover
Rising costs
Wear
Cost
Recommendation

ERRORS

Lease services not fulfilled

Unnecessary replacement
Repairs more costly than replacement

(TASK STATEMENT) PROVIDE SERVICE AND MAINTENANCE TO INDIVIDUAL APARTMENTS AND COMMON AREAS

<p>SCIENCE</p> <p>Construction techniques Electrical skills Plumbing, heating, and air-conditioning Painting Cleaning and sanitation Interior decorating skills</p>	<p>MATH — NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts Guess and check method Rule of thumb</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Writing Speaking</p>	<p><u>EXAMPLES</u></p> <p>Prepare rules and guidelines that refer to maintenance work and cooperation needed Signs, letters, notices Explain work to tenants if requested</p> <p style="text-align: right;">77</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Spelling, clarity of expression, logic, persuasion Enunciation, clarity of expression, logic, poise</p>	

Duty J

Maintaining, Repairing and Improving Project by Staff and Contractors

- 1 Inspect complex and forecast maintenance needs and cost
- 2 Establish work schedule, work incentives and control activities
- 3 Study and control individual functions of staff
- 4 Provide employee training, refresher courses, and work incentives
- 5 Contract for selected maintenance and service
- 6 Prepare, fill out, and file work forms and pass outs

81

(TASK STATEMENT) INSPECT COMPLEX AND FORECAST MAINTENANCE NEEDS AND COST

82

**TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON**

Building inspection report forms:
interior
exterior
grounds
Community rules and forms for safety and health
Records of projects past costs and/or records of average cost in other complexes
Standard forms available from Institute of Real Estate Management

PERFORMANCE KNOWLEDGE

Select appropriate forms and delegate responsibility for inspection
Schedule inspection, collect, and analyze data
Follow through with indicated action after conference with owner
Note: In some cities, a city inspector who inspects a building on his/her own time (moonlighting) must report code violations to city

SAFETY -- HAZARD

Note safety and health code violations

DECISIONS

Determine value of preventive maintenance versus repair as needed
Determine schedule for repairs

CUES

"Heavy" damage on inspection
Poor maintenance
Inspection and forecast reports
Kind of repairs
Cost
Money available

ERRORS

Excessive costs
Unrentable apartments
Loss of revenue

TASK STATEMENT) INSPECT COMPLEX AND FORECAST MAINTENANCE NEEDS AND COST

<p>SCIENCE</p> <p>Exhibit capacity to understand clear statement of rationale Distribute personnel with regard to leadership qualities and experiences for optimum team performance</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts Estimation</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Reading Viewing</p>	<p><u>EXAMPLES</u></p> <p>Reports Inspection</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Comprehension, detail/inference, logic, general vocabulary Visual analysis, detail/inference, logic, recognize symbols, codes, emblems, color discrimination</p>	

(TASK STATEMENT) ESTABLISH WORK SCHEDULE, WORK INCENTIVES AND CONTROL ACTIVITIES

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON	PERFORMANCE KNOWLEDGE	SAFETY -- HAZARD
<p>Bulletin board for posting schedules Work schedule forms Calendar of special maintenance</p>	<p>Work schedule by day, week, year Provide for check off of work schedule and enforce compliance Allow for flexibility and emergencies Continue to improve schedule Give incentives for employee performance Keep cost records</p>	<p>Establish and enforce safety and health rules regarding equipment, tools, and materials used in maintenance work</p>
<p><u>DECISIONS</u> Determine whether to abandon written work schedule for workers that demonstrate ability to manage their time Determine amount and type of work to be scheduled</p>	<p><u>CUES</u> Tenant complaints -- frequency of service calls Lease terms, preventative maintenance schedule vacancies</p>	<p><u>ERRORS</u> Underestimate time required to do quality work Laxity of control Over or under worked employees</p>

TASK STATEMENT) ESTABLISH WORK SCHEDULE, WORK INCENTIVES, AND CONTROL ACTIVITIES

<p>SCIENCE</p> <p>Exhibit capacity to engender clear statement of rationale Distribute personnel with regard to leadership qualities and experiences for optimum team performance</p>	<p>MATH - NUMBER SYSTEMS</p>
	<p>Basic arithmetic skills and concepts Reduction of fractions Changing mixed numbers to improper fractions Changing percents to fractions and fractions to percents Finding a percent of a number and what percent one number is of another Changing fractions to decimals and decimals to fractions Ratio and proportion Estimation Rounding off decimals and whole numbers Approximation using scientific notation Guess and check method Rule of thumb Property of comparison equality/equivalence inequality/greater than/less than</p>

<p>COMMUNICATIONS</p>		
<p><u>PERFORMANCE MODES</u></p> <p>Speaking</p> <p>Writing</p>	<p><u>EXAMPLES</u></p> <p>Interviewing workers</p> <p>Work schedules</p>	<p><u>SKILLS/CONCEPTS</u></p> <p>Terminology Implying Clarity of expression Logic Poise Penmanship, spelling, classification, logic</p>
<p>83</p>		

STUDY AND CONTROL INDIVIDUAL FUNCTIONS OF STAFF

(TASK STATEMENT)

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON

Knowledge of:
 Troubleshooting techniques
 Building nomenclature
 Blueprint reading
 Use of building materials
 Interior finishes
 Exterior finishes
 Utilities service
 Custodial service and equipment
 Landscape care
 Preventive maintenance
 Appropriate management forms

PERFORMANCE KNOWLEDGE

Post work schedule
 Require performance reports
 Analyze tasks individually
 Reprimand or reward
 Consult vendors or specialists on trouble spots
 Maintain confidence of employees
 Make corrections whenever necessary
 Review cost of materials used
 Prepare and check performance on instructions
 for apartment cleaners

SAFETY -- HAZARD

Establish and enforce safety and health rules
 regarding equipment, tools and materials
 used in maintenance work

DECISIONS

Determine whether to re-assign work for
 efficiency
 Determine whether to remove sub-standard
 work

CUES

Tenant complaints, frequency of service calls,
 outside consultants, costs

ERRORS

Excessive cost
 Excessive time

(TASK STATEMENT) STUDY AND CONTROL INDIVIDUAL FUNCTIONS OF STAFF

<p>SCIENCE</p> <p>Exhibit capacity to engender clear statement of rationale Distribute personnel with regard to leadership qualities and experiences for optimum team performance</p>	<p>MATH - NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Reading Speaking</p>	<p><u>EXAMPLES</u></p> <p>Performance reports Employee interview</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Comprehension, detail/inference, logic, informational report Clarity of expression, questioning techniques, logic</p>	<p>87</p>

(TASK STATEMENT) PROVIDE EMPLOYEE TRAINING, REFRESHER COURSES, AND WORK INCENTIVES

<p>TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON</p> <p>Professional courses Associations Experienced employees Suppliers and vendors Consulting engineers Government publications Health and safety groups Police and fire department Developer Utility companies</p>	<p>PERFORMANCE KNOWLEDGE</p> <p>Set up formal training if possible Provide new employees with phone numbers and names of people to call Set training deadline for employee Be specific when criticizing</p>	<p>SAFETY - HAZARD</p>
<p><u>DECISIONS</u></p> <p>Determine whether to have formal or on the job training Determine whether to hire inexperienced or experienced help Determine whether to have employees to do the work or contract to have it done</p>	<p><u>CUES</u></p> <p>Training needs, equipment, type of work Difficulty of work aptitude of employee Complexity and scope of work</p>	<p><u>ERRORS</u></p> <p>Loss of efficiency, excessive costs</p>

(TASK STATEMENT) PROVIDE TRAINING, REFRESHER COURSES, AND WORK INCENTIVES

<p>SCIENCE</p> <p>Exhibit capacity to engender clear statement of rationale Distribute personnel with regard to leadership qualities and experiences for optimum team performance</p>	<p>MATH -- NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking Writing</p>	<p><u>EXAMPLES</u></p> <p>Interviewing or instructing employees Reports, keeping records of training</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Enunciation, clarity of expression, logic, persuasion Penmanship, spelling, classification, clarity of expression, informational reports</p>	<p>87</p>

(TASK STATEMENT) CONTRACT FOR SELECTED MAINTENANCE AND SERVICE

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON

Conventional contracts available
 New construction drawings
 Major painting schedules
 Masonry work
 Grounds maintenance program
 Heating and air-conditioning diagrams
 Trash collection contracts
 Snow removal contracts
 Security (on premise)
 Employees
 Rentals
 Forms needed:
 Service request
 Estimate forms and rules
 Field purchase orders and accounts
 Budget approved by owner

PERFORMANCE KNOWLEDGE

Define and schedule routine contracting
 Outline emergency contracts and system for securing performance
 Select contractors and arrange terms
 Establish plan for inspecting contract work
 Keep records of contractor's performance
 Make sure utility companies and suppliers of equipment perform maintenance and services they are obligated to perform
 Pay contractors
 Record contract as an operating cost

SAFETY - HAZARD

Establish and enforce safety and health rules regarding equipment, tools and materials used in maintenance work

DECISIONS

Select work to contract
 Determine billing procedure and schedule of payment

CUES

Available maintenance help; cost of in-house maintenance versus contract
 Contract terms

ERRORS

Loss of efficiency; excessive costs

(TASK STATEMENT) CONTRACT FOR SELECTED MAINTENANCE AND SERVICES

<p>SCIENCE</p> <p>Exhibit capacity to engender clean statement of rationale Distribute personnel with regard to leadership qualities and experiences for optimum team performance</p>	<p>MATH - NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts Percentages and interest</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Reading Writing</p>	<p><u>EXAMPLES</u></p> <p>Cost estimates Informal contracts Keeping records Writing contracts</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Comprehension, detail/inference, informational reports Penmanship, spelling, classification</p>	<p>89</p>



(TASK STATEMENT) PREPARE, FILL OUT, AND FILE WORK FORMS AND PASS OUTS

TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON

Management forms or pass outs:
 Prospective tenant's questionnaire
 Rental application, and apartment lease
 Community rules
 List of services and conveniences
 Newsletter and bulletins
 Rent collection report (internal)
 Rental report (to manager)
 Rental survey record (competition)
 Police check (to police)
 (Personal history of the individual)
 Instructions for apartment cleaners (also a check list for performance to be turned in to the office)
 Apartment check list (for use in damage and maintenance checks)
 Repair order forms (internal and contractor)
 Requisition - purchase order; work schedules
 day, month, year Building and Exterior Inspection Report and form letters

PERFORMANCE KNOWLEDGE

Set up system for procuring and dispersing forms
 Instruct appropriate persons in use of forms
 Insist on completion of forms and check performance
 Follow up with appropriate action
 Keep records at a convenient location

SAFETY - HAZARD

Keep forms and files in fireproof containers

DECISIONS

Determine forms essential to the operation

CUES

Failure to turn in forms
 Poor completion rates indicates misunderstanding by employees
 Accuracy checks

ERRORS

Too many reports will destroy initiative of employees
 Meaningless forms and reports waste time and money

PREPARE, FILL OUT, AND FILE WORK FORMS AND PASS OUTS

TASK STATEMENT)

<p>SCIENCE</p>	<p>MATH -- NUMBER SYSTEMS</p>
<p>Basic arithmetic skills and concepts</p>	
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u> Viewing Speaking</p>	<p><u>EXAMPLES</u> Completed forms Instructions for use of forms</p>
<p><u>SKILLS/CONCEPTS</u> Visual analysis, detail/inference, recognize symbols, codes, and emblems Clarity of expression, enunciation</p>	

Duty K

Administrating, Record Keeping, and Communications

- 1 Coordinate all phases of operation
- 2 Keep records, including bookkeeping
- 3 Supervise social activities and relations between tenants
- 4 Report to owners monthly and annually

(TASK STATEMENT) COORDINATE ALL PHASES OF OPERATION

<p>TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON</p>	<p>PERFORMANCE KNOWLEDGE</p>	<p>SAFETY - HAZARD</p>
<p>Associations Legal aid</p>	<p>Maintain office and staff Integrate work of on-site and off-site employees Purchase and store supplies Assign and inspect work, security and code compliance Manage budget and pay bills Report to owner and city officials Supervise social events Inform all interested parties of facts required to do work properly Provide answering service for phone</p>	<p>Keep forms and files in fireproof containers</p>
<p><u>DECISIONS</u> Delegate authority or maintain highly centralized control Determine whether to integrate with community or be self-sufficient</p>	<p><u>CUES</u> High morale of employees Net profit</p>	<p><u>ERRORS</u> Delegating responsibility without authority or incentives is serious error No feedback Check discrepancies</p>

COORDINATE ALL PHASES OF OPERATION

(TASK STATEMENT)

SCIENCE

Exhibit capacity to engender clear statement of rationale
 Distribute personnel with regard to leadership qualities and experiences for optimum team performance
 Grant attention to smoothly flowing teamwork
 Exhibit capacity to ascertain best service for tenants
 Communicate pride in establishment

MATH - NUMBER SYSTEMS

Basic arithmetic skills and concepts

COMMUNICATIONS

PERFORMANCE MODES

Speaking
 Writing
 Reading

EXAMPLES

Coordinate communication between tenants, employees, owners
 Reports, keeping records
 Manuals, journals, reports, estimations

SKILLS/CONCEPTS

Clarity of expression, logic, general vocabulary
 Penmanship, spelling, classification, logic, general vocabulary
 Comprehension, detail/inference, informational reports, definition

(TASK STATEMENT) KEEP RECORDS, INCLUDING BOOKKEEPING.

TOOLS, EQUIPMENT, MATERIALS,
OBJECTS ACTED UPON

Office staff may be:
secretary
head housekeeper
rental agent
chief maintenance person
bookkeeper
Management form or pass outs: prospective tenants questionnaire, rental application, apartment lease, community rules, list of services and conveniences, newsletter, rent collection report (internal), rental report (to manager), rental survey record (competition), police check (to police), (personal history of applicant), instructions for apartment cleaners (also a check list for performance) to be turned into office, apartment check list (for use in damage and maintenance checks), repair order forms, requisition purchase order

PERFORMANCE KNOWLEDGE

Hire accountants and/or bookkeepers
Identify functions, complex structures and unit
Assign responsibility for collection of data or collect personally
Establish procedure for filing, processing, and analyzing records
Be prepared to disperse information, summarize facts for owner or managers for advertising, publicity or legal purposes
File information on significant one time events for use in year end report

SAFETY - HAZARD

Records and files kept in fireproof storage

DECISIONS

Evaluate data for relative
Determine what records to keep or destroy

CUES

Long hours
Inability to produce essential facts
No profit operation
Duplicates
Type of transaction
Tax needs

ERRORS

Excessive work overkill very likely
Too little data particularly in subsidized housing

SCIENCE	MATH -- NUMBER SYSTEMS
	<p>Basic arithmetic skills and concepts Percentages Ratios</p>
COMMUNICATIONS	
<p><u>PERFORMANCE MODES</u></p> <p>Writing Viewing</p>	<p><u>EXAMPLES</u></p> <p>Records Data</p>
	<p><u>SKILLS/CONCEPTS</u></p> <p>Penmanship, spelling, classification, logic, denotation/connotation Visual analysis, detail/inference, recognize symbols, codes, emblems</p>

(TASK STATEMENT) SUPERVISE SOCIAL ACTIVITIES AND RELATIONS BETWEEN TENANTS

<p>TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON</p>	<p>PERFORMANCE KNOWLEDGE</p>	<p>SAFETY - HAZARD</p>
<p>May hire social director Community rooms and kitchens Furniture for lounge Athletic equipment and recreation areas Pool and accessories Amenities - park benches, fountains</p>	<p>Maintain social centers, swimming pools, parks or lakes, and other amenities compatible with complex image, space, or rent structure Supervise the amenities to maximize tenant satisfaction at an optimum cost Advertise and promote all amenities Help groups arrange for specific meetings Publish social calendar</p>	<p>Social and athletic functions create dangers of legal action by tenants against landlord, unless areas conform closely to the legal requirements Improper landscaping or selection of trees and shrubs can produce hazards Parking lots - sidewalks, swimming pools produce hazards</p>
<p><u>DECISIONS</u> May hire social director May allow outsiders to rent social area or recreational areas May allow firm to lease laundry and put in their own machines Permit employees to manage social and recreational area</p>	<p><u>CUES</u> Level of use Size of complex</p>	<p><u>ERRORS</u> Failure to utilize social and recreational area properly No public insurance</p>

TASK STATEMENT) SUPERVISE SOCIAL ACTIVITIES, AND RELATIONS BETWEEN TENANTS

<p>MATH – NUMBER SYSTEMS</p> <p>Basic arithmetic skills and concepts Reduction of fractions Changing mixed numbers to improper fractions Changing percents to fractions and fractions to percents Finding a percent of a number and what percent one number is of another Changing fractions to decimals and decimals to fractions Ratio and proportion Estimation Rounding off decimals and whole numbers Approximation using scientific notation Guess and check method Rule of thumb Property of comparison equality/equivalence inequality/greater than/less than</p>	<p>SCIENCE</p> <p>Exhibit capacity to engender clear statement of rationale Distribute personnel with regard to leadership qualities and experiences for optimum team performance Grant attention to smoothly flowing teamwork Exhibit capacity to ascertain best service for tenants Communicate pride in establishment</p>
<p>COMMUNICATIONS</p>	
<p><u>PERFORMANCE MODES</u></p> <p>Speaking Writing</p>	<p><u>EXAMPLES</u></p> <p>Tenant and employee activities Notices, newsletters</p>
<p><u>SKILLS/CONCEPTS</u></p> <p>Clarity of expression, logic, general vocabulary Spelling, clarity of expression, general vocabulary</p>	

(TASK STATEMENT) REPORT TO OWNERS MONTHLY AND ANNUALLY

<p>TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON</p>	<p>PERFORMANCE KNOWLEDGE</p>	<p>SAFETY -- HAZARD</p>
<p>Complete set of management forms and redo records Assistance of accountant or bookkeeper Economic data on local community</p>	<p>Prepare cash flow statement current and for same period as previous year Present summary of major repairs and improvements Give a thumbnail sketch of the quality of tenants Report promotions and ad activities Supply social calendar with notes on success and failures Project earnings and activities for next calendar year</p>	<p>Report accidents and safety/hazards remaining in complex Check for errors in wording or math Keep copies of all reports</p>
<p><u>DECISIONS</u> Determine whether to give date with relatively little analysis or present detailed interpretations</p>	<p><u>CUES</u> Amount of discrepancy from previous reports Owner's policy Suggestions for improvement</p>	<p><u>ERRORS</u> Owner dissatisfaction</p>

TASK STATEMENT) REPORT TO OWNER S MONTHLY AND ANNUALLY

<p style="text-align: center;">SCIENCE</p>	<p style="text-align: center;">MATH — NUMBER SYSTEMS</p>
<p>Basic arithmetic skills and concepts Percentages Statistics and analysis Charts, diagrams, graphs</p>	

<p>COMMUNICATIONS</p>		
<p><u>PERFORMANCE MODES</u></p> <p>Writing Speaking</p>	<p><u>EXAMPLES</u></p> <p>Reports, tables Oral report or interview</p>	<p><u>SKILLS/CONCEPTS</u></p> <p>Spelling, clarity of expression, classification, description, informational reports, logic General vocabulary, enunciation, clarity of expression, logic, gestures, dress, facial and body features, poise</p>

GLOSSARY

Amenity — Amenities are functions, services, physical features or attractions provided to build tenant good will or serve as marketing tools. That type of service is minimal in low income units and maximized in luxury projects.

Project — is the most common term used to describe the span of control of one resident manager. It may be a wing of a building, one building or several buildings with grounds, parks, and recreation areas.

Complex -- is sometimes used interchangeably with project but usually applies to the larger rental properties.

Tenant — refers to occupant of a rental unit.

Leasee — is a term used interchangeably with tenant referring to person holding the lease.

Comparables — are records of real estate sales that have been completed. Recent sales of property of the type under consideration aid in indicating market value.

Profile of a tenant — refers to the vital statistics, socio-economic factors and rent performance of existing tenants of project or competing projects.

A desirable or planned profile — describes the tenant body property managers would prefer.

Rent rolls — show tenants name, apartment number, lease data and rent payment.

Subsidized developments — are those using government money for all or part of financing.

Developer — Company or person who plans and/or constructs projects (developer and owner may be the same).

Optimum — This is the best or most that can be obtained at a reasonable cost or sacrifice. In other words, optimum occupancy may not be 100% but some level less than 100% that will allow major maintenance and repair or provide for continuing rental effort.