

## **CAMT Soft Skills Course**

### **Study Guide**

#### **Module 1 Welcome**

- Attitude matters: maintenance service complaints are more often related to attitude than technical ability
- Appearance matters: present a clean, well-groomed professional appearance every day and comply with the dress code if your company has one
- Consider wearing steel-toed safety shoes even if they are not a requirement
- Wear your company-issued ID badge whenever you are onsite

#### **Module 2 Customer Service**

- Practicing good customer service is critical to your performance
- Good customer service benefits everyone: residents get their needs met, which results in fewer complaints and service calls, and leads to more renewed leases and greater profitability for the property
- Remember that the residents are your customers. Always be friendly but keep it professional so you are not accused of favoritism.
- Good customer service starts with good communication--be a good listener, ask questions, be respectful and calm, and project confidence
- Follow your company's rules about what information you can and cannot discuss with residents and visitors. These rules are designed to protect the privacy of residents and to protect you and your employer from lawsuits.
- Do not criticize your employer or apartment community's policies in front of customers. Instead of blaming the policy, try to explain the reasoning behind the policy.
- Tips for good listening:
  - Put aside distractions and focus on the speaker
  - Maintain eye contact
  - Ask questions to clarify the issue
  - Write down notes if necessary
  - Repeat back what you've heard to clear up any misunderstandings
- Because you enter the homes and workspaces of your residents and team members, it is especially important that you do it in a careful and polite way

- Do not touch residents' personal belongings or ask personal questions about residents' possessions.
- When entering a resident's home, make sure you have everything you need, including tools, personal protective equipment (PPE) and disposable shoe covers. Avoid wearing different gear for some residents than others.
- PPE protects you from both known and unknown dangers, so it should be worn in all instances.
- If an appointment has been scheduled with a resident and you don't get an answer when you knock, wait at least one full minute, then knock again. Wait another minute and knock a third time if necessary. After the third knock, unlock the door and open it slightly. Announce your arrival loudly before stepping inside, just in case the resident is home and didn't hear you knocking. Continue announcing your presence as you walk through the apartment.
- Once you've determined that no one is at home, leave a sign on the front door that lets people know that you are working inside.
- When maintenance work is completed, leave a note in an obvious, visible place. Let the resident know you were there as well as what work you did. This may mean leaving a copy of the service request.
- If you see any illegal, unsafe or otherwise reportable conditions in the home, don't try to take care of it yourself. Leave everything as it is and alert your manager to the problem.
- Two of the most common reasons for not being able to enter a home where you are scheduled to work are unsecured pets and unaccompanied children.
- If the resident is not home and the animals are not restrained, don't go in.
- If you arrive at a home and there are minors present but no adults at home, don't enter. If the service call is urgent or an emergency, call for backup before entering a home with unaccompanied minors. Only in the most extreme of circumstances, such as a fire or flood, is it OK to enter a home where there are minors home alone.
- When communicating with an upset person: Listen, Apologize, Solve the problem and say Thanks for the opportunity to serve (LAST).
- Remember that residents will take your words literally.
- Fair Housing laws govern what you can say or do to residents and visitors in your apartment community. These federal laws prevent discrimination based on race, color, religion, sex, handicap, familial status, or national origin.

## Module 3 Teamwork

- Team members should treat one another as internal customers and provide one another with good customer service.
- There are three forms of apartment community management:
  - Owner-managed (owner manages property directly)
  - Third-party managed (owner hires separate company to oversee property)
  - Housing authority (local housing authority manages operations)
- Apartment owners generally fall into three types of investors:
  - The Flipper (buy a property that needs a lot of work and sell it quickly for profit)
  - The Holder (hold a property for 5-10 years and sell when it increases in value)
  - The Long-term Owner (buy for the long term with no plans to sell)
- Know which type of investor owns your property, as different investor types often have different budget, repair and remodeling priorities
- Consult with your community manager for any clarification of the work you need to do and to report any problems you encounter.
- It is always best to talk with team members in person and away from residents, especially if the conversation may move into sensitive areas.
- Feedback is important because it lets you know what you are doing right, what you are doing wrong and how to improve.

## Module 4 Time and Project Management

- Key factors in effective project management include:
  - Developing good project plans
  - Keeping up with project communication
  - Working with vendors and contractors
- No matter how carefully you plan, unexpected things come up and you will need to be flexible enough to change your time management plan when your situation changes.
- Tips to help you use your time wisely:
  - Plan: develop a plan for the day
  - Prioritize: arrange your to-do list in order of importance
  - Write: carry a small notepad with you to write things down
  - Eliminate: figure out which tasks might be unnecessary time wasters
- Five elements to consider when planning a project:
  - Goals: What are you trying to accomplish?
  - Resources: What do you need to accomplish it? (equipment, materials, etc.)

- Time: How much time do you need to do it?
- Money: How much will it cost? Where will the money come from?
- Scope: What are the specifics of the project?
- Project communication tips:
  - Schedule regular meetings to keep people informed of progress
  - Immediately notify the appropriate people when problems arise
  - Communicate facts that are relevant to your audience
  - Talk about the good and the bad honestly
  - Post appropriate permits according to local law and keep your documentation in good order
- “Scope creep” refers to a build-up of small changes to a project plan that seem like no big deal but turn into a big problem when they are added up.
- Scope creep can delay projects and make them much more expensive than expected. Be prepared to explain how changes to the plan will affect the project.
- Project plans should be accurate, thorough and well-researched. Plans should include:
  - A detailed description of the work to be done
  - The necessary materials and equipment
  - The location of the work
  - The timeframe for completion of the work
  - The necessary permits and licenses
  - Any other information a contractor would need to know to place a bid on the work
- Just as a contractor’s bid is based upon the project plan, much of the contract that governs their work will also draw upon the plan.
- When a contractor’s work is complete, you must inspect it thoroughly before the contractor gets paid. Do this inspection with the contractor present so that you can talk about any changes that need to be made.
- After the work has been completed, you and the contractor will sign a completed scope and specifications checklist. These checklists are the proof that the work was done as specified in the contract.

## Module 5 Documentation and Paperwork

- Common types of paperwork to fill out include:
  - Service requests
  - Required books and logs
  - Timesheets
  - Purchase orders
- Service requests provide a record of your work so they must be clear and complete. Write down what you actually did, including any relevant details.
- Never refer to a protected class on your service requests. Document the problem, not the person who caused the problem.
- Safety and environmental regulations may require your apartment community to keep some of the following documentation:
  - Refrigerant logs
  - Hazardous communication books (SDS)
  - Preventive maintenance logs
  - OSHA annual reports of accidents
  - Pool inspections
- Federal law requires that hourly employees be paid for all time worked, including overtime. Make sure that you report your hours accurately and on time.
- Purchase orders specify the type, quantity and expected price of the items you're buying from a specific vendor. They document the transaction and provide a helpful record of your history with vendors.
- Remember that everything written in your documentation can be used in a lawsuit.
  - Avoid violating Fair Housing laws
  - Document the problem, not the person
  - Never refer to a protected class
  - Stick with the facts of the situation
- Always provide a detailed description of the work you do. Without the details your documentation can't be used to prove the work was done in situations where such proof is needed.

## Module 6 Maintenance and Emergencies

- Routine maintenance activities are those tasks that you do regularly to keep the property in good condition.
- Curb appeal is the first impression people get when they visit or pass by your community. Good curb appeal brings prospective residents in the door and makes it more likely they'll sign a lease.
- Requested maintenance activities are those you take on because you've received a specific request, either from a resident or another team member.
- You can reduce the amount of time you spend on requested maintenance by taking care of routine and preventive maintenance and by doing a thorough job of make-ready maintenance.
- Service requests are generally taken care of in the order in which they are received but emergencies always take first priority.
- If you do additional work while completing a service request, be sure to document it on the service request before you leave.
- Preventive maintenance activities refer to service and repairs done to extend the life of property and equipment, reduce unexpected problems and keep small problems from becoming big ones.
- Make-ready maintenance refers to the maintenance you do to get a vacant apartment ready for a new resident. It needs to be done as quickly as possible without sacrificing the quality of the work.
- Scheduled replacement work involves the planned replacement of some part of the apartment community. There are two types: major replacement and retrofitting.
- Major replacement refers to the planned replacement of large or expensive items, like a new roof or parking lot.
- Retrofitting refers to the planned replacement of outdated or inefficient equipment with newer, more efficient equipment.
- Be sure to know your after-hours emergency policy so you're able to respond appropriately when residents call after hours.
- Make sure your team has an emergency contact list that includes first responders as well as utility companies and your own company's chain of command.
- Your emergency action plan should describe each team member's responsibilities and how information will be communicated during an emergency, along with evacuation procedures.

## Module 7 Safety First

- Practices you'll use to avoid workplace hazards include:
  - Using personal protective equipment (PPE)
  - Obeying safety signs and symbols
  - Using locks and tags on all energy sources (water, gas, electricity, oil)
- Safety equipment is color-coded to communicate safety messages. For example, red communicates danger and is used to mark fire protection equipment, safety cans and emergency stop bars. Yellow is used to communicate caution and mark physical hazards.
- Danger signs are used for immediate hazards and are usually red, black and white.
- Caution signs are used to warn of potential hazards and are usually yellow and black.
- Safety instruction signs provide information and are usually green and white.
- The skull-and-crossbones symbol warns that something is poisonous.
- The flame symbol warns that something is flammable.
- The line-through-a-cigarette symbol warns that there should be no smoking in the immediate area.
- Lockout tagout is a special safety standard that applies to working with energy or power sources. Locks and tags protect you and others from accidental injury while working with these power sources.
- To ensure safety, locks and tags should only be removed by the person who placed them there in the first place.
- There are four steps to the lockout tagout process:
  - Shut off the source of energy.
  - Attach a lockout device, and lock and tag it
  - Release or drain any energy left in the pipes, circuits or equipment.
  - Test to be sure the energy is turned off and removed from the pipes, circuits or equipment.
- The following Personal Protective Equipment (PPE) should be worn at all times when working in an apartment where you may come into contact with bodily fluids:
  - Eye protection
  - Face shield
  - Gloves
- The CDC reports that the number one way to prevent disease transmission and cut down on illnesses is hand washing.
- When working with electricity:
  - Use appropriate PPE
  - Turn off the power before doing electrical repairs

- Lock and tag equipment before tests and repairs
- Inspect tools regularly for good insulation
- Keep your distance from power lines
- Be extra careful around flammable materials
- Don't do electrical repairs you haven't been trained to do
- Never repair an electrical cord by wrapping it with tape
- Never alter the plug on an electrical cord
- Protect yourself from blood-borne pathogens by observing these rules:
  - Treat all blood as if it is infectious
  - Practice proper hygiene
  - Use care when cleaning up sharp objects and spills, or handling needles
  - Wear appropriate PPE
- Safety data sheets (SDS) provide the knowledge you need to handle chemicals safely and to respond in case of accidental exposure or spills
- Use these types of PPE to protect against chemical exposure:
  - Chemical-resistant goggles
  - Face shields or mist masks
  - Chemical-resistant gloves
  - Rubber aprons
  - Long-sleeve shirts and work pants
  - Sturdy work shoes or boots
- Mold grows wherever moisture is present, so regular property inspections for water damage are key in the prevention of mold pollution
- Follow these steps for cleaning and removing mold:
  - Figure out how big the problem is and what materials are affected
  - Develop a plan of action
  - Get appropriate PPE to wear
  - Fix the moisture problem
  - Discard moldy items that can't be cleaned
  - Dry non-moldy items within 24 hours
  - Check for any return of moisture
  - Use a HEPA filter vacuum for final clean-up
  - Reevaluate the plan if you find more mold
- Consult mold remediation or abatement professionals if the affected area is larger than 100 square feet (10 feet by 10 feet)



- Compressed gas cylinders store gases under very high pressure. Always keep compressed gas cylinders upright and braced (or tied down) to prevent them from being bounced around or knocked over.
- Keep oxygen tanks away from oil products, as the risk of explosion is high.
- Lead, asbestos and refrigerants are all regulated by the Environmental Protection Agency (EPA).
- Improper handling of refrigerants can result in large fines and other penalties.
- Most accidents at work are caused by carelessness. The best thing you can do to avoid accidental injury is to take proper precautions.
- Basic rules for tool and equipment safety:
  - Keep tools and equipment in good condition
  - Examine tools and equipment for damage before use
  - Use the right tool for the job
  - Follow manufacturers' operating instructions
  - Get properly trained for tools that require training
  - Use the right PPE for the equipment
- An emergency action plan should include assignments for each member of the team, a list of emergency contact numbers, evacuation plans and routes, and any other information necessary to limit injuries and property damage.

## Module 8 Compliance

- Federal fair housing laws state that it is illegal to discriminate against any person based on these seven characteristics
  1. Race (ethnicity)
  2. Color (skin color)
  3. Religion (any religious beliefs)
  4. Sex (man or woman)
  5. Handicap (mental or physical impairments)
  6. Familial status (presence of children)
  7. National origin (country or place where you or ancestors were born)
- There are other classes that may be protected locally, including sexual orientation, military status, student status and public housing clients
- Fair housing laws apply to visitors and prospective residents as well as to current residents
- Federal fair housing laws prohibit any attempt to influence a person's choice of housing; this is called steering

- The law applies regardless of your intent; you do not need to intend to discriminate against someone to be guilty of breaking the law
- Apartment owners and staff are not legally allowed to steer people with disabilities into particular apartments and cannot refuse to make reasonable accommodations that make it possible for them to live there
- Buildings with at least four apartments and an elevator that were built after March 31, 1991 must have:
  - Accessible public and common areas
  - Wheelchair-accessible doors, hallways, kitchens and bathrooms
  - Accessible routes into and throughout the apartments
  - Accessible switches, outlets and thermostats
  - Reinforced bathroom walls to allow installation of grab bars
- Be sure that none of your actions or words could be construed as sexual harassment. There are two types of sexual harassment: quid pro quo and hostile environment
- Proper use and disposal of substances that might cause harm to the environment are subject to regulation. The substances you need to be most concerned with are lead, asbestos and refrigerants.
- The two federal agencies responsible for enforcing environmental regulations are the Environmental Protection Agency (EPA) and the Occupational Safety and Health Administration (OSHA)

## Module 9 Money Matters

- Gross Potential Income is the total amount of rent that could be collected if all apartments were leased at the highest market value
- Loss to Old Leases is the amount that is lost due to the fact that existing leases for current residents probably are not bringing in as much rent as they would be if they were leased to new residents today
- Net Rentable Income is the highest collectible rent on the property
- Vacancy Loss is the money lost to vacant apartments (including model apartments)
- Other Income refers to the money collected from fees, vending machines, parking spaces, rental and all income that is not classified as apartment rent
- Net Collectible Income represents the amount of money that the property should collect
- Operating Expenses are all the costs to maintain the property, including payroll, taxes, insurance, maintenance and contracts for services like pest control and landscaping

- Net Operating Income (NOI) is an important “report card” that tell you how well your onsite team is doing managing its budget
- NOI is used to determine the value of the property
- NOI is the total operating income of your apartment community, minus its operating expenses
- Debt Service is the property’s mortgage costs, including both the principal and interest payments
- Capital Expenses represent large repair, replacement and upgrade projects.
- Repair and Replacement Reserves is a fixed amount of money the mortgage-holding bank may require the property to set aside for large replacement and repair projects
- Cash Flow represents whatever is left over after everything else has been accounted for
- The Chart of Accounts lists all the different categories of supplies and expenses in the budget. You will need to know which category to charge for any purchase.
- Your apartment community’s financial plan is called the operating budget; this is a summary of the anticipated income and expenses for the year
- A budget variance is the difference between a budgeted income or expense number and the actual income or expense number