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Facilitator Guide

Human Resources



Human Resources

Table of Contents

Introduction	7
Welcome.....	7
Materials.....	7
Agenda.....	8
Employment Laws	9
Federal Protected Classes	10
Federal Posting Requirements	20
Compensation, Benefits, and Overtime	22
Total Cash Compensation.....	22
Base Compensation	23
Benefits	25
Incentive/ Variable Pay	26
Free or Discounted Housing.....	27
Scheduling Responsibilities.....	31
Overtime Calculations.....	32
Payroll.....	38
Employee Records.....	39
Employment Process	44
Identify Employment Need.....	45
Job Descriptions.....	46
Recruitment Methods.....	52
Applications	55
Interviews.....	56

Interview Questions 62

The Interview 64

Evaluating Candidates..... 64

Making an Employment Offer..... 68

Employee Needs throughout Employment 77

 New Employee Orientation 77

 Record Keeping 79

 Training Needs..... 79

 Management Performance..... 81

 SMART Goals..... 81

 Process Improvement 86

 Motivating Employees..... 88

 Rewards and Recognition..... 84

 Performance Evaluations..... 92

 Conflict Resolution 95

 Employee Complaints..... 97

 Harassment..... 99

 Substance Abuse..... 101

 Workplace Violence 102

 Disciplinary Action..... 103

 Termination..... 105

Wrap Up 108

Knowledge Check Answers 109

Notes to Facilitator

This guide is designed to help you manage the information for this module and to help increase consistency at all training locations nationwide.

Duration

This is a 7-hour module (excluding breaks and lunch)

Materials Needed

- PowerPoint Slides
- Creekwood Case Study
- Human Resources Participant Workbook

Equipment Needed

- PowerPoint slides
- Flipchart or whiteboard with stand and markers
- Computer with connection to project PowerPoint slides
- Microphone if necessary – dependent on room size and setup
- Sound system to play videos if necessary

Using Slides

You will notice that some of the slides build, and when that happens, it can be difficult for the Facilitator to know when the slide is at its end. To help with that, there is a red period that indicates the last build. On any slide where you don't see a red period, that means that there is more, and to click again.

Knowledge Checks

There are Knowledge Checks at the end of the PWB. They are used by participants as a self-study after class and are not to be reviewed in class. A copy of the Knowledge Checks with answers are at the end of this Facilitator Guide.

Participant Workbook

Participant Workbook pages are noted throughout the facilitator guide. Use them to direct participants to summaries of classroom content. When providing page numbers, explain to participants they can follow along with classroom content, take notes, and/or use the content as a study aid after class. In some cases additional details are listed in the Participant Workbook; this is supplemental “nice-to-know” information.

At the end of each Participant Workbook, you will see Knowledge Checks pertaining to that section. Explain to participants that they can use these for self-study after class. Answer are provided on the pages following the questions.

Module “At-A-Glance”

The timing in this guide is provided as a guideline and is estimated on an average class size of 25; modify or alter as needed.

Topic	Activity	Duration
Introduction	<ul style="list-style-type: none"> n/a 	5 mins
Employment Laws	<ul style="list-style-type: none"> Participants will conduct a full review of all pertinent employment laws 	60 mins
Payroll, Benefits, and Overtime	<ul style="list-style-type: none"> Participants will learn the components of a compensation plan Participants will use the case study to calculate the total cost of an employee, and will convert the value of rent to an hourly rate. The class will weigh the pros and cons of having an onsite employee versus a contractor. 	50 mins
Employment Process		
Identifying the Need	<ul style="list-style-type: none"> Participants will review sample job descriptions and identify if they are complete. 	15 mins
Recruiting and Sourcing	<ul style="list-style-type: none"> Participants will discuss applicant sourcing and recruiting. The employment application is reviewed 	20 mins
Interviewing	<ul style="list-style-type: none"> Participants will identify if sample interview questions are legal to ask. Participants will work with interview guides 	25 mins
Evaluating Candidates Making an Offer	<ul style="list-style-type: none"> Participants will read a Creekwood applicant interview and test results to assess if they would hire an applicant. Conditional offers and employment-at-will are taught 	25 mins
Employee Needs throughout Employment		
Employee Orientation and Training	<ul style="list-style-type: none"> The orientation process and handbook are discussed. Employee training formats are taught and discussed 	40 mins
Management Performance	<ul style="list-style-type: none"> Participants will learn important professional tips to ramp up their performance levels. Participants will discuss goal-setting and write SMART goals. 	50 mins

	<ul style="list-style-type: none"> Participants will learn ethics, delegation, and managing change 	
Motivating Employees	<ul style="list-style-type: none"> Participants will brainstorm ideas for motivating employees. 	40 mins
Employee Evaluations	<ul style="list-style-type: none"> Participants learn the importance of monitoring performance Participants will understand how to conduct a performance evaluation 	30 mins
Conflict Resolution & Disciplinary Action	<ul style="list-style-type: none"> Participants will learn how to handle conflict and employee complaints. Harassment response, drug use on the job and preventing violence are discussed A practice case offers solutions to an employee complaint. Progressive discipline and counseling techniques are taught 	35 mins
Termination	<ul style="list-style-type: none"> Suspension and different forms of termination are taught Participants learn successful termination tips 	20 mins
Wrap Up	<ul style="list-style-type: none"> n/a 	5 mins
		420 mins

Introduction

Welcome

Slide 1

Welcome participants.



Materials

Slide 2

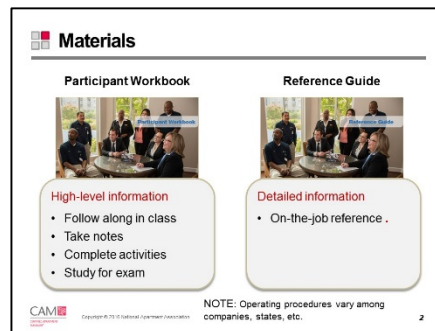
Provide the following materials and explain their purposes.

Click and explain the Participant Workbook:

- Used in class to follow along with information, take notes, and complete activities
- Used as a study aid for the exam
- Contains high-level information covered in class, worksheets, activity information, etc.

Click and explain the Reference Guide:

- Used after class as an on-the-job reference
- Contains detailed information about topics covered in class
- Available online in the Candidate Resources section of the NAA website



Agenda

Slide 3

Display slide.

Review the Agenda.

Slide 4

Display slide.

Click to Play video.

The image shows two screenshots from a presentation. The top screenshot is a slide titled "Agenda" with a list of topics and two flowcharts. The list includes: Employment Laws, Payroll, Benefits, and Overtime, Employment Process, and Employee Needs Throughout Employment. The flowcharts show the recruitment process (Identifying Employment Need, Recruiting and Sourcing, Applications and Interviews, Evaluating Candidates, Making an Employment Offer) and the employee lifecycle (New Employee Orientation, Training Needs, Management Performance, Motivating Employees, Performance Evaluations, Conflict Resolution, Disciplinary Action, Termination). The bottom screenshot shows a video player interface with the title "Human Resources" and a dark video area.

Employment Laws

Slide 5

Transition “Let’s start with laws that affect employment.”

Display the section title slide and **introduce** the topic.



Slide 6

Display Employment Laws slide.

Explain that employment law covers virtually everything from recruiting, hiring, terms and conditions of employment, termination, and post-employment relationships.

Explain that as an employer, a CAM must know and understand all federal, state, and local employment laws. Explain that if there is ever a doubt about whether a policy or practice is legal to consult with your HR representative or the company’s legal counsel.



Slide 7

Display Reference: Employment Laws slide.

Refer participants to the Participant Workbook for a list of **Employment Laws**.

Review content from Participant Workbook. Carefully **review** each law. Remind students that this is a long list but that these laws are tested material.

Reference: Employment Laws



See the Participant Workbook for a list of **Employment Laws**.

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Employment Laws

Employment law covers virtually everything from recruiting, hiring, terms and conditions of employment, termination, and post-employment relationships.

- The Equal Employment Opportunity Commission (EEO or EEOC) dictates who is protected under employment laws in the United States.
- The EEOC oversees and enforces all policies and regulations utilizing the following:
 - Laws from Title VII of the Civil Rights Act of 1964 (Title VII)
 - The Equal Pay Act of 1963 (EPA)
 - The Age Discrimination in Employment Act of 1967 (ADEA)
 - Title I and Title V of the Americans with Disabilities Act of 1990 (ADA)
 - Others

Employment Law	Compliance	Coverage and Enforcement
<p>Fair Credit Reporting Act (FCRA)</p> <p>Employers must gain written consent to request a report</p>	<ul style="list-style-type: none"> To request a consumer report, gain written consent from the applicant or employee. If you reject an applicant as a result of the report, you must provide two written notifications, a copy of the report, a copy of FCRA rights, and credit reporting agency contact numbers. Notifications include a pre-adverse and an adverse action notice. 	<p>Covers: All employers</p> <p>Enforced by: Federal Trade Commission</p>
<p>Title VII of the Civil Rights Act of 1964, as Amended</p> <p>Prohibits discrimination of race, color, religion, sex, or national origin throughout entire employment process</p>	<ul style="list-style-type: none"> In ads and job descriptions, avoid words suggesting preferences towards race, color, sex, religion, or national origin. Advertise in publications with as wide a circulation base as possible. Application forms must comply with laws. Ensure that job interviews are uniform & focused on job-related issues. Display EEOC employee rights poster. 	<p>Covers: Employers with at least 15 employees</p> <p>Enforced by: EEOC</p>
<p>The Civil Rights Act of 1991</p> <p>Anyone suing for intentional discrimination is allowed to recover compensatory and punitive damages</p>	<ul style="list-style-type: none"> Use caution with adverse employment actions. Avoid situations where an applicant or employee can assert willful discrimination. Ensure tests are validated for neutrality and do not adversely impact against any group. Retain all records for 1 year. 	<p>Covers: Employers with at least 15 employees</p> <p>Enforced by: EEOC</p>
<p>Age Discrimination in Employment Act (ADEA)</p> <p>Prohibits employment discrimination based on age over 40 years.</p>	<ul style="list-style-type: none"> Don't ask questions regarding or revealing age. Don't advertise suggesting age preferences (e.g. recent college graduate). Don't consider age when making employment decisions, or considering reviews and promotions. Don't inquire about or encourage retirement. Retain the following records for one year: <ul style="list-style-type: none"> applications, resumes, job inquiry forms documentation regarding promotions, demotions, transfers, training selection, layoff, recall, or discharge 	<p>Covers: Employers with at least 20 employees</p> <p>Enforced by: EEOC</p>

Employment Law	Compliance	Coverage and Enforcement
<p>Title I of the Americans with Disabilities Act</p> <p>Prohibits employment discrimination against disabled persons who, with or w/out reasonable accommodation, can perform the job.</p>	<ul style="list-style-type: none"> • Make interviewing & hiring decisions on the ability to do the job, not on a disability. • State the requirements of the job and ask if they can satisfy the requirements. • Do not ask additional questions only to applicants who may have disabilities. Avoid application or interview questions focusing on possible disabilities. • Focus job descriptions on essential job functions so a person with a disability isn't eliminated from job consideration due to inability to perform a marginal job duty. • Defer medical exams and inquiries until after a conditional offer of employment. • If a question, inquiry, examination, or test screens out someone, the exclusionary criteria must be "job-related and consistent with business necessity." • If an applicant is not hired for safety reasons, you must demonstrate a "direct threat" to himself or others that cannot be eliminated through accommodation. • Health or medical records must be maintained in a separate, confidential file from standard employment records. 	<p>Covers: Employers with at least 15 employees</p> <p>Enforced by: EEOC</p>
<p>Fair Labor Standards Act (FLSA)</p> <p>Sets requirements for timekeeping, minimum wage, overtime, and regulates child labor employment</p>	<ul style="list-style-type: none"> • Exemptions from the FLSA's minimum wage, overtime, and timekeeping provisions exist for executive, administrative, professional, computer, & outside sales employees. Is dependent on how a person is paid and actual job duties (not job title). • For non-exempt employees, ensure time is documented, and they are paid accordingly. • If you hire anyone under the age of 18, check all child labor laws; do not hire anyone under the age of 14. • Retain the following records for two years: <ul style="list-style-type: none"> • basic employment and earnings records • supplemental records such as contacts and records about wages and hours 	<p>Covers: Employees who work for an "enterprise" or meet individual eligibility requirements See the Human Resources Reference Guide for more information.</p> <p>Covers most apartment firms</p> <p>Enforced by: Wage & Hour Division of Department of Labor</p>

Employment Law	Compliance	Coverage and Enforcement
<p>FLSA Overtime Rules</p> <p>Employers must pay at least the federal minimum wage and 1.5 times their regular rate for overtime.</p>	<ul style="list-style-type: none"> • Carefully review actual job duties & compensation levels of each employee to ensure they're properly classified & compensated under FLSA. • Proactively consult legal counsel and a professional HR team regarding exempt and non-exempt status to avoid costly investigations and litigation. • Use the three tests that are used determine whether an employee is eligible for overtime pay: Salary, Salary Basis, & Duties Tests. • Perform regular compliance audits that include the tests, housing benefits, records, & overtime wages. • Always check state law to ensure compliance. <p>Note: Executive, administrative, professional, computer, outside sales, & highly compensated employees are exempt. Job titles do not determine status; salary & duties do.</p>	<p>Covers: Employees who work for an “enterprise” or meet individual eligibility requirements</p> <p>See the Human Resources Reference Guide for more information.</p> <p>Covers most apartment firms</p> <p>Enforced by: Wage & Hour Division of Department of Labor</p>
<p>Equal Pay Act</p> <p>Employers must pay equal wages to male & female employees who perform similar work of equal skill, effort, and responsibility</p>	<ul style="list-style-type: none"> • Do not pay an individual more or less based on gender. • Specific recordkeeping is not required. It is suggested that records be maintained one (1) year under the requirements for Title VII of the Civil Rights Act of 1964. 	<p>Covers: Employees who work for an “enterprise” or meet individual eligibility requirements</p> <p>Covers most apartment firms</p> <p>Enforced by: EEOC</p>

Employment Law	Compliance	Coverage and Enforcement
<p>Occupational Safety and Health Act (OSHA)</p> <p>Regulates workplace safety and health</p>	<ul style="list-style-type: none"> • Provide employees a workplace free from hazards and comply with OSHA safety and health standards. • Employers with 11 or more employees must maintain a log of all injuries and illnesses. • Require all employees to read safety policies. • Report any job-related fatality or overnight hospitalization to OSHA following regulations. • Conduct periodic safety inspections of facility. • Provide: <ul style="list-style-type: none"> • Work safety instructions before job start • Safety Data Sheets (SDS) in a binder • Personal protective equipment 	<p>Covers: Private sector employers</p> <p>See the Human Resources Reference Guide for more information.</p> <p>Enforced by: Occupational Safety & Health Administration (OSHA)</p>
<p>Employee Retirement Income Security Act (ERISA)</p> <p>Regulates employee pension and welfare benefit plans.</p>	<ul style="list-style-type: none"> • Know about company retirement or pension plans. • Appoint a plan administrator to: <ul style="list-style-type: none"> • Follow through on law’s requirements • Provide a summary plan (within 90 days) • Answer questions about pension plans • Records must be kept for six years supporting the data in the Summary Plan and related welfare pension reports. • Records determining eligibility for benefits must be retained as long as relevant. 	<p>Covers: Employers who maintain or sponsor pension and welfare plans</p> <p>Enforced by: The Secretary of Labor</p>
<p>Immigration Reform and Control Act (IRCA)</p> <p>Prohibits employment discrimination based on national origin or citizenship</p> <p>Prohibits employers from hiring illegal aliens or to knowingly accept false documents</p>	<ul style="list-style-type: none"> • I-9 process must be followed. • Do not refuse to hire an individual because you believe they may not have legal employment status. Let the verification process of the I-9 form determine eligibility. • It is illegal to request more documents other than required by form I-9. • I-9s and supporting documents must be kept for three (3) years after hire and one year after termination. 	<p>Covers: Employees hired after Nov. 6, 1986</p> <p>Enforced by: Department of Homeland Security</p>

Employment Law	Compliance	Coverage and Enforcement
<p>National Labor Relations Act (NLRA)</p> <p>Regulates all labor-management relationships and prohibits discrimination based on union activity</p>	<ul style="list-style-type: none"> • Be familiar with the law and/or the collective bargaining agreement specifics. • Consult HR or Legal counsel about your responsibilities. • Do not interfere, restrain, or coerce employees about union participation, membership, or activities the Act protects. • Specific recordkeeping is not required. Written reprimands or disciplinary action may be needed in case of a dispute. 	<p>Covers: Private sector employers that impact interstate commerce</p> <p>Enforced by: National Labor Relations Board (NLRB)</p>
<p>Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA)</p> <p>Prohibits employment discrimination due to military obligations</p>	<ul style="list-style-type: none"> • You must reinstate an employee’s job upon honorable completion of military duty. • No specific recordkeeping is required, however all employment records that are retained may be subject to review should a claim be filed. 	<p>Covers: All employers</p> <p>Enforced by: Office of Veterans’ Employment & Training Service (VETS) of Department of Labor</p>
<p>Jury Systems Improvement Act</p> <p>Prohibits disciplining or discharging employees due to being called to serve on a federal jury</p>	<ul style="list-style-type: none"> • Grant unpaid leave to employees performing federal jury service and reinstate them to their jobs when jury service is over. <p>Note: Although this law addresses federal juries, similar laws may exist at the state or local level. Check state and local law or consult legal counsel.</p>	<p>Covers: All employers</p> <p>Enforced by: Department of Justice</p>
<p>Employment Polygraph Protection Act of 1988 (EPPA)</p> <p>Prohibits employers from requiring applicant polygraph tests</p> <p>Limited exceptions apply</p>	<ul style="list-style-type: none"> • Do not use polygraphs as a means of pre-employment screening. • Consult with legal counsel whether the facts allow for an employee polygraph. • Do not allow an employee to volunteer to take a polygraph test. • Every employer subject to EPPA must post a poster advising employees of their rights under the Act. • Retain these records for three (3) years: • A copy of any statement provided to employees, relating a specific incident being investigated that resulted in economic loss. • The basis for testing, records of employer loss, nature of employee’s access to person/property being investigated or any 	<p>Covers: Most private sector employers Apartment management firms</p> <p>Enforced by: Secretary of Labor</p>

Employment Law	Compliance	Coverage and Enforcement
<p>Family and Medical Leave Act (FMLA)</p> <p>Entitles employees to unpaid, job-protected leave for specified family & medical reasons</p>	<ul style="list-style-type: none"> • Ensure that your company has a policy that clearly defines the limitations and requirements for employee and employer. Your FMLA policy must be included in employee handbooks. • During leave, continue health insurance coverage without extra charges. Employee must continue to pay premiums (typically deducted from a paycheck). • Reinstate employment to the same or equivalent position upon return. • Display FMLA rights poster. • Provide written guidance on employee rights & responsibilities to those who request leave. • Keep the following records for 3 years: <ul style="list-style-type: none"> • Payroll data, leave documents, employer notices of leave, & premium payments • Dispute records & medical records 	<p>Covers: Employers that employ 50 or more employees at a worksite or at combined worksites within a 75 mile radius.</p> <p>Employees must meet eligibility requirements.</p> <p>Enforced by: Secretary of Labor</p>
<p>Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA), as amended</p> <p>Allows extension of insurance coverage on a self-pay basis, to those who would otherwise lose coverage due to leave, reduced hours, termination, etc.</p>	<ul style="list-style-type: none"> • Notify an employee of his right to continue coverage within 14 days from employee separation date. • Require a return receipt for all notices. • Collect ex-employee’s premium each month. • Your HR, payroll, or an insurance company will likely be responsible for compliance. • No specific recordkeeping is required, but you should keep records of notifications sent to employees about their rights to extend coverage. 	<p>Covers: Most private sector employers with 20 or more employees with a group health plan.</p> <p>Enforced by: Secretary of Labor</p>
<p>Health Insurance Portability and Accountability Act of 1996 (HIPAA)</p> <p>Provides standards for an employee’s new group health plan to limit or exclude pre-existing conditions</p>	<ul style="list-style-type: none"> • Compliance with this law is more the responsibility of the employer’s medical insurance company. • The plan administrator for an employer is responsible for providing HIPPA documentation and must have copies of employee enrollment documents, and any correspondence with the insurance company 	<p>Covers: Employers who provide health coverage</p> <p>Enforced by: Secretary of Labor</p>

Employment Law	Compliance	Coverage and Enforcement
<p>Workers' Compensation</p> <p>Each state has its own insurance system for workplace injury claims</p>	<ul style="list-style-type: none"> Check with your state agencies responsible for workers' compensation administration for compliance and record keeping information. <p>Note: Not all states require workers' compensation.</p>	<p>Covers: All employees who work at the property</p> <p>Enforced: At state level only</p>

Within these laws protected classes include:

- Race
- Color
- Religion
- Sex (including harassment)
- Women (with respect to equal pay)
- Individuals age 40+
- Genetic Information
- Disability
- National Origin
- Pregnancy

Federal Protected Classes

Slide 8

Display Federal Protected Classes slide.

Explain the following key points:

- The Equal Employment Opportunity Commission (EEO or EEOC) dictates who is protected under employment laws in the United States.
- The EEOC oversees and enforces all policies and regulations utilizing the following:
 - Laws from Title VII of the Civil Rights Act of 1964 (Title VII)
 - The Equal Pay Act of 1963 (EPA)
 - The Age Discrimination in Employment Act of 1967 (ADEA)
 - Title I and Title V of the Americans with Disabilities Act of 1990 (ADA)
 - Others

List protected classes in employment:

- Race
- Color
- Religion
- Sex (including sexual harassment)
- National Origin (this also includes citizenship)
- Women (with respect to equal pay)
- Individuals age 40+
- Disability
- Genetic Information
- Pregnancy

Explain that there may be other protected classes at the state and local level.

Click and Emphasize that protected classes under the Fair Housing Act and protected classes based on employment laws are different.

Federal Protected Classes

- Race
- Color
- Religion
- Sex (including harassment)
- Women (regarding equal pay)
- Individuals age 40+
- Genetic Information
- Disability
- National Origin
- Pregnancy

Protected classes under the Fair Housing Act and protected classes based on employment laws are different.

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Slide 9

Display Who is Included slide.

Explain that anyone who is hired to perform a service, or who is allowed to perform a service falls under the definition of an employee and is covered by employment laws.

Click and List each group covered by laws.



Slide 10

Display Who is Not Included slide.

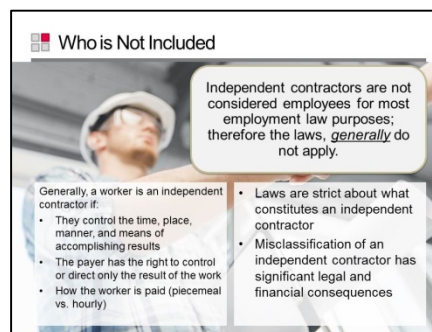
Explain that independent contractors are not considered employees for most employment law purposes, and the laws, *generally* do not apply.

Click and Define independent contractor:

- The contractor controls the time, place, manner, and means through which desired results are accomplished.
- An individual is an independent contractor if the payer has the right to control or direct only the result of the work and not what will be done, when it will be done, and how it will be done.
- How the worker is paid (piecemeal vs. hourly)
- This is the general rule according to the IRS.

Click and Review the following key points

- Laws are strict about what constitutes an independent contractor
- Misclassification of an employee as an independent contractor has significant legal and financial consequences



Slide 11

Display slide.

Read the slide.

Click and **explain** that understanding what the law requires will hopefully help the CAM avoid misunderstandings, conflict, and legal entanglement.

Note that state and local jurisdictions may also have laws that apply to labor and employment which are not covered in this material.



Federal Posting Requirements

Slide 12

Display Federal Posting Requirements slide.

Click to Show each point and **Review** information about federal posting requirements.

Federal Posting Requirements

- Must be posted where employees can see them:
 - Near time clocks
 - In break rooms
 - Designated department locations
- Must not be altered, defaced, or covered by other material
- Additional requirements in some states .



Slide 13

Display Federal Posting Requirements slide.

Click to Show each point and **Review** information about federal posting requirements.

Federal Posting Requirements

- Available from:
 - Various federal agencies
 - HR product catalogues
 - Many general supply & office supply vendors
- Posters can be ordered online
 - Some include all federal posting requirements
 - Some incorporate state laws
- Use the most current version in both English and Spanish as needed .



Slide 14

Display Reference: Federal Posting Requirements slide.

Refer participants to the Participant Workbook for a list of **Employment Laws**.

Review content from Participant Workbook.

Reference: Federal Posting Requirements



See the Participant Workbook for a list of **Federal Posting Requirements** .

Federal Posting Requirements

All of the federal required posters are available from various Federal agencies, but are also available from human resource product catalogues and many general supply and office supply vendors. You can buy posters online. Some include federal posting requirements and some include federal and state. Purchased posters are usually laminated.

Law	Posting
Fair Labor Standards Act	“Employee Rights Under The Fair Labor Standards Act”
Title VII of The Civil Rights Act of 1964 and the Age Discrimination in Employment Act of 1967 (ADEA)	“Equal Employment Opportunity is The Law”
Employee Polygraph Protection Act	“NOTICE - Employee Polygraph Protection Act”.
OSHA- Occupational Safety and Health	“Job Safety & Health Protection—It’s the law”
Americans with Disabilities Act of 1990	A notice, which is included in the “Equal Employment is The Law” poster. <u>Caution:</u> Failure to post this notice is punishable by a fine of up to \$100 for each separate offense
Family and Medical Leave Act	“Your Rights under the Family and Medical Leave Act of 1993”
Equal Pay Act	A posting, which is included in the “Equal Employment is The Law” poster. <u>Caution:</u> Willful violations of the EPA may be prosecuted criminally and the violator fined up to \$10,000. A second conviction for such a violation may result in imprisonment.
Uniformed Services Employment and Re-Employment Rights Act (USERRA)	“Your Rights Under USERRA”

Compensation, Benefits, and Overtime

Slide 15

Display the section title slide and **introduce** the topic.

Explain that throughout this section, you will record items that participants should ask their HR departments about.

Label a section of the whiteboard or a flipchart as “HR Questions” and add questions to the list as they arise.



Total Cash Compensation

Slide 16

Display Total Cash Compensation slide.

Explain that employees need to recognize that compensation is more than just salary or hourly wage. The employer contributes on behalf of the employee for :

- Benefit coverage
- 401 (k) or other retirement plan contribution
- Unemployment insurance
- Workers’ compensation
- A variety of other special programs that enhance the total compensation package

List inclusions of total cash compensation.

Total Cash Compensation

- Base Salary
- Benefits (e.g. health insurance)
- Free apartments or employee rent discounts
- Incentive/variable pay
- Recognition/reward programs
- Additional benefits .



Base Compensation

Slide 17

Display Base Compensation slide.

Define Base Compensation:

- Rate of pay; the first part of total pay
- May be a salaried or hourly rate

Note that salaried employees have an annual rate of pay.

Click and Explain that surveys help determine what other property management companies in the industry nationwide pay for comparable jobs. Another source is the local apartment associations

Click and Explain the methods to determine salary.

- Typically targeted at the median results
- Create ranges that take into account experience, property size, difficulty of property assignment, and performance:
 - High quality work performance can move someone up the pay scale
 - Knowledge and prior experience may allow salary to start at higher level

Note that management companies frequently identify appropriate pay ranges for each position and take the items listed below into account.

Base Compensation


Rate of pay; the first part of total pay

Use survey data (e.g. NMHC)

- "Survey Report on National Apartment Management Compensation and Benefits Practices" conducted by Watson Wyatt Data Services

Methods to determine salary:

- Method 1: Target the median (middle)
- Method 2: Create ranges based on experience and performance .



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Slide 18

Display Base Compensation Example slide.

Explain that there are other considerations that need to be taken into account when establishing a rate of pay for an employee.

Provide the following example:

You have an opening for a Maintenance Supervisor which you could fill by promoting an existing maintenance tech *or* hiring an experienced supervisor from the outside. You would need to pay the existing tech \$50,000, or pay the experienced supervisor \$65,000.

Ask: What are some of the things you would want to consider when making your decision?


Sample Answers:

- How well the current team is performing (i.e. Do they need a very experienced supervisor to help them improve their performance?)
- Is it a large or growing staff?
- What can your budget tolerate?

Base Compensation Example

You have an opening for a Maintenance Supervisor which you could fill by:

- Promoting an existing maintenance tech and paying him \$50,000/year
- or
- Hiring an experienced supervisor from the outside and paying him \$65,000/year .



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Benefits

Slide 19

Display Benefits Package slide.

Explain that an important part of total pay is the contributions made by the company toward the cost of employee benefits.

Explain that people typically talk in terms of salary when discussing how much it costs a company to employ a worker. In fact, a salary may represent just a portion of the total compensation if the employer offers a benefits package.

Note that a March 2016 report by the Bureau of Labor Statistics found that the average employee benefits package costs an employer \$10.70 per employee per hour worked. For a 40-hour employee that's \$22,256 per year; however, costs vary greatly based upon the nature of work and the type of employer.

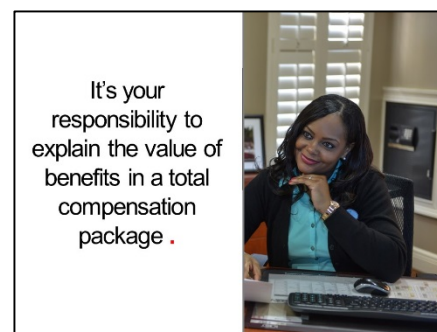
List benefits components and **Note** that medical benefit costs continue to be the largest share of the cost of employer-sponsored benefits packages.

Click and Explain that the size of annual pay increases may be tempered by the need to balance increased benefit costs. It is estimated that benefit costs add 30-40% to basic payroll costs.

Slide 20

Display slide.

Emphasize that it is a CAM's responsibility to explain the value of benefits in a total compensation package.



Incentive/ Variable Pay

Slide 21

Display Incentive/Variable Pay slide.

Define Incentive or Variable pay

- Pay that varies with individual performance and sometimes with team performance

Explain that most apartment management companies have variable or incentive-based pay available to employees at the community level.

Slide 22

Provide the following examples:

- The property may pay \$75 for a lease renewal that is shared with the maintenance team.
 - The leasing consultant earns a \$50 bonus.
 - \$25 for each renewal goes into a “pool” that is shared by the maintenance team.

Slide 23

Provide the following example:

- The entire onsite team may receive an incentive based on achieving a certain occupancy percentage benchmark.
 - E.g. the team splits \$2,500 when 95% occupancy is achieved.

Slide 24

Provide the following example:

- Frequently, Managers and Maintenance Supervisors earn periodic bonuses based on measuring actual NOI against budgeted NOI or against prior year NOI.

Incentive/Variable Pay



Pay that varies with individual or team performance


- Leasing professionals
 - New leases
 - Lease renewals
- Community managers
 - Meet financial goals
- Maintenance personnel
 - Resident satisfaction/retention
- Team performance
 - Occupancy benchmarks
 - Financial benchmarks

21

Incentive/Variable Pay Examples

Example 1:
The property pays \$75 for a lease renewal that is shared with the maintenance team.

- The leasing consultant earns a \$50 bonus.
- \$25 for each renewal goes into a “pool” that is shared by the maintenance team.




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Incentive/Variable Pay Examples

Example 2:
The entire onsite team may receive an incentive based on achieving a certain occupancy percentage benchmark.


- E.g. the team splits \$2,500 when 95% occupancy is achieved.



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Incentive/Variable Pay Examples

Example 3:
Frequently, Managers and Maintenance Supervisors earn periodic bonuses based on measuring actual NOI against budgeted NOI or against prior year NOI.



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Free or Discounted Housing

Slide 25

Display Free or Discounted Housing slide.

Explain that free or discounted housing must be considered in total compensation and benefits.

Recommend that they consult with legal counsel regarding the FLSA impact of this benefit.

Emphasize that a CAM must follow management company policies with regard to employees living on site.

- Often, month-to-month leases are required and apartments must be vacated within a specified time frame when an employee is terminated or separates from the company voluntarily.

Slide 26

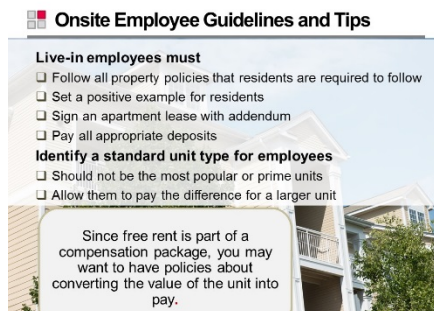
Display Onsite Employee Guidelines and Tips slide.

List employee requirements for onsite housing.

Click and Explain that employees should never select the most popular or prime units.

- Some consideration should be given to identifying a standard unit type that would be made available for an employee.
- Employees should be allowed to pay the difference for a larger unit. E.g., employees required to live on site will be provided a standard 2 BR / 2 BA apartment. Note that CAMS should refer to their formal discount apartment policy, if one exists.

Click and Read the key point on slide.



Slide 27

Display Advantages of Onsite Employees slide.

Click to Show each point and **Review** the advantages of having onsite employees.

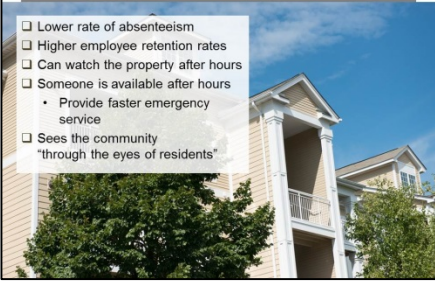
Slide 28

Display Liabilities of Onsite Employees slide.

Click to Show each point and **Review** the liabilities of having onsite employees.

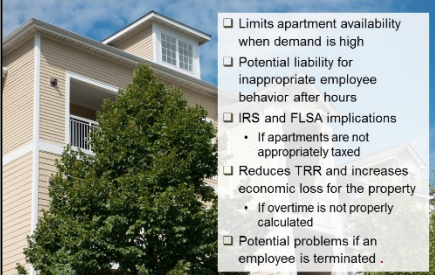
Advantages of Onsite Employees

- Lower rate of absenteeism
- Higher employee retention rates
- Can watch the property after hours
- Someone is available after hours
 - Provide faster emergency service
- Sees the community "through the eyes of residents"



Liabilities of Onsite Employees

- Limits apartment availability when demand is high
- Potential liability for inappropriate employee behavior after hours
- IRS and FLSA implications
 - If apartments are not appropriately taxed
- Reduces TRR and increases economic loss for the property
 - If overtime is not properly calculated
- Potential problems if an employee is terminated .



Slide 29

Display Employee Housing slide.

Explain that providing employees with free or discounted rent reduces economic occupancy because less rent is collected – thus impacting NOI.

Click and Explain that there are several IRS requirements that must be met if:

- An employee receives free rent
- The unit is not shown as taxable income to the employee

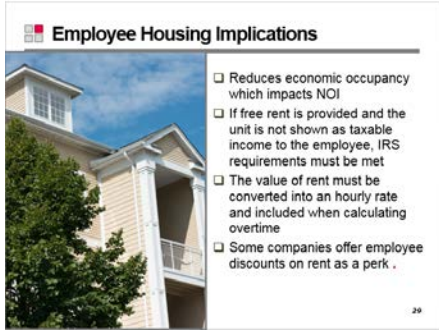
Some states require that all or a portion of the value of the apartment is still subject to State Disability Insurance, Unemployment Insurance and Workers' Compensation.

Click and Explain that if an employee lives on site and receives all or a portion of their rent free as part of their compensation package, the value of rent must be:

- Converted into an hourly rate
- Included when calculating overtime at time-and-a-half

Click and Explain that some companies offer employee discounts as a perk.

- Care should be taken to ensure that employees are living on the properties where they work or one property is reimbursing another if they do not live where they work.
- Some companies may choose to not allow employee discounts for company employees that do not work at their property.



Employee Housing Implications

- Reduces economic occupancy which impacts NOI
- If free rent is provided and the unit is not shown as taxable income to the employee, IRS requirements must be met
- The value of rent must be converted into an hourly rate and included when calculating overtime
- Some companies offer employee discounts on rent as a perk .

29

Slide 30

Display Activity: Creekwood Employee Housing slide

Objective: Prompt participants to consider all elements of offering free employee housing and analyze the most effective result

Duration: 10 minutes

Instructions:

- **Refer** participants to the Employee Housing scenario in their Participant Workbook (also included below.)
- **Instruct** participants to (individually) convert the value of rent to an hourly rate.
- **Instruct** participants to (individually) calculate the figure into total employee compensation.
- **Circulate** the room and assist with calculations as needed.

Answers:

Annual value of apartment: $\$730 \times 12 = \$8,760$

Total hours worked in a year : $40 \text{ hours} \times 52 \text{ weeks} = 2,080$

Additional hourly rate : $\$8,760 \div 2,080 = \4.21

Total hourly compensation for the maintenance supervisor: $\$23.21$

Debrief:

- **Ask** “Aside from the financial difference, what things do you need to consider when making your decision to have onsite employees?”
 - **Guide** the conversation towards weighing the pros and cons of having an onsite employee and determine if it is a good investment.

 **Activity:** Creekwood Employee Housing
Instructions:

1. Using the examples in your Participant Workbook, convert the value of rent to an hourly rate.
2. Calculate the figure into total employee compensation.

- Mention that some states require an on-site manager when the complex is over a certain size.
- **Conduct** a survey by raise of hands to see how many participants chose an onsite employee vs. an offsite employee.
- **Reinforce** the value of weighing the decision.
- **Transition** into a discussion about budget, economic occupancy, IRS, and calculating overtime.

Employee Housing Scenario:

Your Creekwood maintenance supervisor's standard rate of compensation is \$19 per hour. As part of his compensation, he lives on site in a free two bedroom-two bath apartment; the monthly market rent on this apartment is \$730.

To find the total hourly compensation for the maintenance supervisor, calculate the 'Rate of Rent Discount' for his free employee housing and add it to his standard rate of compensation.

Annual value of apartment = Monthly rent x 12 months

Total hours worked in a year = 40 hours x 52 weeks

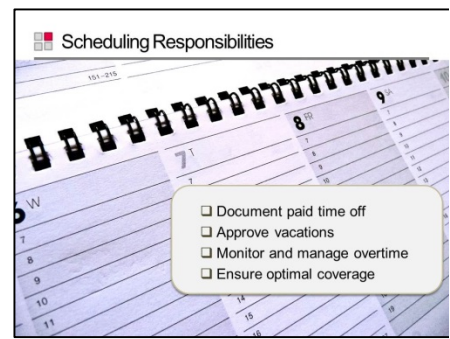
Rate of Rent Discount =
$$\frac{\text{Annual value of apartment}}{\text{Total hours worked in a year}}$$

Scheduling Responsibilities

Slide 31

Display Scheduling Responsibilities slide.

List the items a CAM must consider when making scheduling decisions.

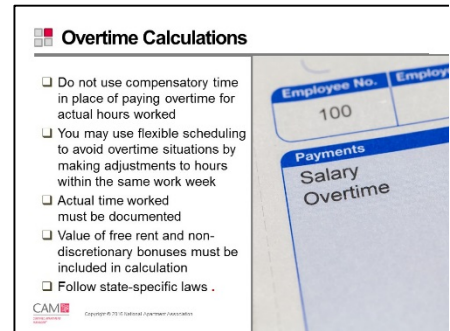


Overtime Calculations

Slide 32

Display Overtime Calculations slide.

Click to Show each point and **Review** key points about calculating overtime.



Slide 33

Display Activity: Cost of an Employee slide.

Objective: Prompt participants to consider all elements of hiring employees from a financial standpoint and analyze the most effective result

Duration: 10 minutes

Part One Instructions:

- **Refer** participants to the Cost of an Employee Scenario Part One in their Participant Workbook (also included below).
- **Instruct** participants to (individually) calculate the total cost of an employee.
- **Circulate** the room and assist with calculations as needed.
- **Debrief** using a flipchart so participants can follow along.

Part One Answers:

- **Question 1:**
 - **Total salary:** $\$15 \times 2,080 \text{ hours} = \$31,200$
 - **Total incentive compensation:** $\$500 \times 4 = \$2,000$
 - **Cost of benefits:** $\$33,200 \times 30\% = \$9,960$
 - **Value of rent discount:** $(\$1,200 \times 12 \text{ months}) \times 50\% = \$7,200$

Total annual compensation: \$50,360

 **Activity:** Cost of an Employee
Instructions:

1. Calculate the total payroll cost of an employee.
2. Calculate the average cost of overtime for one employee to complete needed work.

Is it more cost effective to pay an employee overtime on an on-going basis (at a higher rate of pay) vs. hiring additional staff at a lower rate of pay? .

Cost of an Employee Scenario Part One:

Earnings: Your full-time maintenance technician earns \$15 per hour. He regularly achieves performance goals, earning him an additional \$500 non-discretionary bonus per quarter.

Benefits: His benefit plan includes health insurance and 401k employer contributions. The company also pays his workers’ compensation insurance and unemployment insurance. The total cost of all benefits is 30% of the employee’s total pay.

Housing: He receives a 50% discount on his three-bedroom townhouse. The market rent for this unit is \$1,200/month.

1. How much is the maintenance technician’s total payroll cost?

Answer:

Pay (salary)	\$15/hour x 2080 hours =	\$31,200
Bonus (incentive compensation)	500 x 4 quarters =	2,000
Benefits (cost of benefits)	30% of \$33,200 =	9,960
Housing (value of rent discount)	\$1,200 x 50% x 12 =	+ 7,200
Total Compensation		\$50,360

Part Two Instructions

- **Refer** participants to part two of the Cost of an Employee Scenario Part Two in their Participant Workbook.
- **Instruct** participants to (individually) calculate the average cost of overtime for one employee to complete needed work.
- **Circulate** the room and assist with calculations as needed.
- **Debrief** using a flip chart so participants can follow along.

Part Two Answers:

- **Question 2**
 - **Salary:** \$31,200
 - **Bonus:** \$2,000
 - **Housing:** \$7,200
 - **Cost per hour (regular rate):**
 $\$31,200 + 2,000 + \$7,200 = 40,400$
 $/2080 \text{ hours} = \$19.42$
 - **Cost per hour (overtime rate):**
 $\$19.42 \times 1\frac{1}{2} = \$29.13/\text{hour}$
- **Question 3**
 - **Base pay:** \$31,200
 - **Bonus pay:** 2,000
 - **Housing:** 7,200
 - **Overtime:** $20 \times 29.13 \times 12 = 6,691$
 - **Total annual cost:** \$47,391
- **Question 4**
 - **Contractor Cost:** $3 \text{ units} \times 12 \text{ months} \times \$500/\text{unit} = \$18,000$

Debrief:

- **Click and Ask** “Is it more cost effective to pay an employee overtime on an on-going basis (at a higher rate of pay) vs. hiring an additional staff member at a lower rate of pay (eliminate overtime)?”
- **Ask** “Aside from the financial difference, what things do you need to consider when making your decision?”

- **Guide** the conversation towards topics such as customer satisfaction. For example, while the maintenance technician is focused on vacant turns, resident service requests may become a lower priority. As a result, resident satisfaction may suffer which could result in higher turnover.

Cost of an Employee Scenario Part Two:

Each month the same maintenance technician logs an average of **20 hours of overtime each month** to get 3 vacant units turned and ready for occupancy.

2. Assuming overtime is paid at time-and-a-half of the regular rate, what is the total overtime cost per hour of this employee?

Answer:

Base pay	\$31,200		
Bonus pay	2,000		
Housing	+7,200		
	\$40,400	/ 2080 hours	= \$19.42
	19.42	X 1½	= \$29.13/hour

3. At 20 hours of overtime per month, what is the total annual compensation of this employee?

Answer:

Base pay	\$31,200	
Bonus pay	2,000	
Housing	7,200	
Overtime	+6,991	(20 x 29.13 x 12)
	\$47,391	

4. If the manager hired a contractor to turn those 3 vacant units per month for the entire year at \$500/unit, what would the cost to the property be?

Answer:

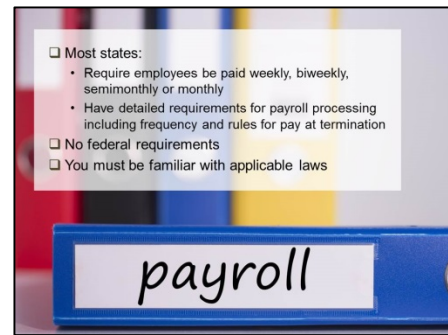
$$3 \text{ units} \times 12 \text{ months} \times \$500/\text{unit} = \mathbf{\$18,000}$$

Payroll

Slide 34

Display slide.

Click to Show each point and **Review** state and federal payroll requirements.



Slide 35

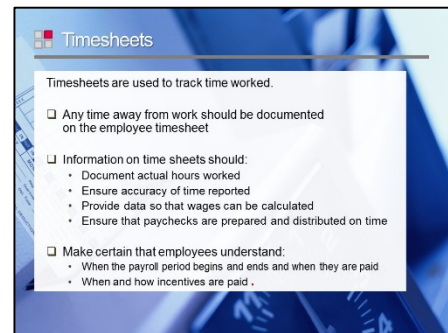
Display Timesheets slide.

Define timesheets:

- Sheets used to track time worked

Explain that any time away from work should be documented on the employee timesheet.

Click to Show each point and **Review** a CAM's payroll responsibilities when they review and approve timesheets.



Slide 36

Display Documenting Time Worked slide.

Explain that paper timesheets are still widely used in the property management industry:

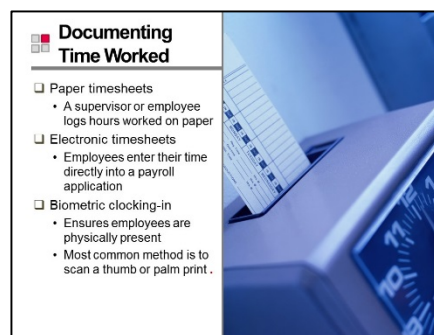
- Either a supervisor logs time worked on behalf of the employee or employees log their time and submit it to their supervisor.

Click and Explain that electronic timesheets are becoming more prevalent:

- Employees enter their time directly into a payroll application.
- Supervisors review and approve timesheets within the payroll application.

Click and Explain that biometric clocking-in is used by some companies to ensure that employees are physically present at their job locations.

- This includes scanning thumb or palm prints as well as iris scans of the eyes.



Employee Records

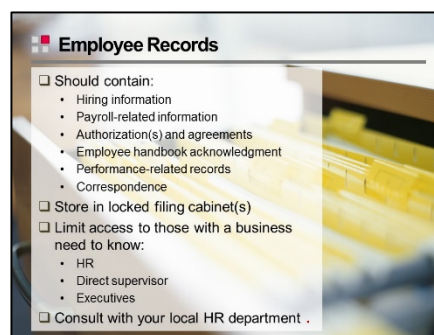
Slide 37

Display Employee Records slide.

Click to Show each point and **Review** key points about employee records.

Explain that most companies do not allow original employee documents to be kept at the property.

- Only retain records needed to monitor employee performance and provide ongoing feedback.
- Most companies have strict rules about releasing those files and allowing employees to see their own files.



Slide 38

Display Confidential Employee Records slide.

Define confidentiality of employee records :

- The collection, use, access, dissemination, retention, and confidentiality of all data maintained on employees

Click and Explain that federal law (ADA) requires that any medical information (including drug screens completed at hire) must be kept in a separate locked file away from other employee records.

Click and List examples of confidential records.

Click and Explain that access should be restricted to supervisors, first aid personnel, and state workers' compensation investigators as permitted by ADA.

Emphasize that the HR manager has a special responsibility to develop a system, which strictly limits employees' access to records other than those for which they have a business need to know.

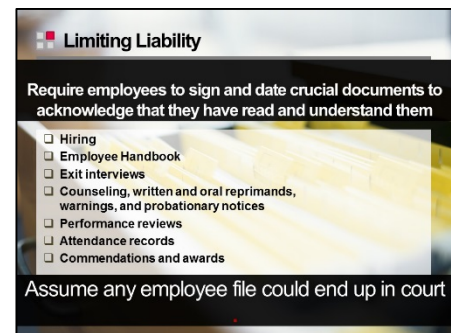
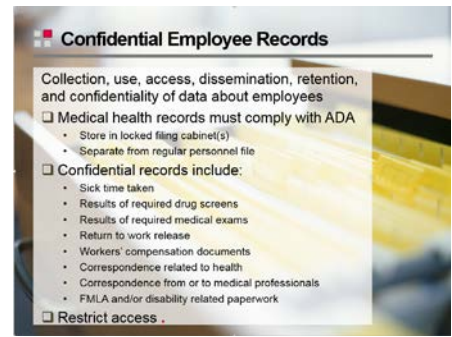
Slide 39

Display and Read Limiting Liability slide.

Explain that a CAM should always document actions to establish a "paper trail" to limit liability and to ensure that proper procedures have been followed.

Click to Show each point and **List** the types of files a CAM should keep.

Click and Read slide.



Slide 40

Display Reference: Employment Records slide.

Refer participants to the Participant Workbook for descriptions of the **Employment Records** a CAM should file.

Review content from Participant Workbook.

 **Reference:** Employment Records



See the Participant Workbook for descriptions of the **Employment Records** a CAM should file. .

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40

Employment Records

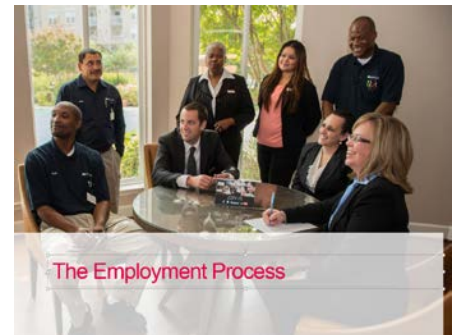
Form	Details
Pre-Employment Documents	Pre-employment documents consist of: <ul style="list-style-type: none"> • Notice and Authorization Regarding Consumer Report • Job Description Acknowledgement • application and resume • employment tests and result • Interview Evaluation form, and • Reference Verification Worksheet.
Employment Documents	These are generally compiled into a package commonly referred to as the “new hire packet,” which includes required forms and employee policy/benefit documents.
Employee Change Form	This provides payroll with the new employee’s basic information, job title, job location, rate of pay, start date, and all other pertinent data that is needed to enter the new employee on payroll and generate a payroll check.
W-4 Form	This must be completed by the employee for the employer to withhold the correct amount of Federal income tax. Each state has a similar form for use in withholding for state income tax.
I-9 Form	The I-9 verifies identity and employment eligibility to work in the United States to comply with the Immigration Reform and Control Act. The Form I-9 is available for downloading at www.usics.gov
Workers’ Compensation Notice	If your state does not require workers’ compensation insurance or a private plan of some type, and your company does not provide coverage, you must notify your employees and they must sign the notice. This is to be used only if your company does not carry workers’ compensation insurance.
Employee Equipment & Supplies Agreement	It details the equipment/supplies that each new employee receives and their responsibility for returning when and if employment ends.
Back Support Belt Acknowledgement form	Any employees, regardless of job title, who may be lifting per their job descriptions, must sign the Back Support Belt Acknowledgement form.
Proof of Automobile Liability Coverage form	Employees who drive for work purposes such as making bank deposits or shopping for supplies should be driving with a current driver’s license and liability insurance. This form documents their current driver’s license information, requires that they comply with the law, and may also protect your company and property.
Acknowledgement of Employee Fair Housing Compliance form	This should be signed by all new employees acknowledging that they have read your company fair housing policy, understand it, and agree to follow it.

Form	Details
Harassment Policy	All employers need a harassment policy and acknowledgement signed by all new employees.
Electronic Systems Policy and Acknowledgement	Users must respect the rights of other users, respect the integrity of the systems and related physical resources, and observe all relevant laws, regulations, and contractual obligations, such as software copyright agreements.
Substance Abuse Policy and Acknowledgement	This policy is a prescription and over-the-counter medications statement.
Handbook Acknowledgement Statement	It is common practice during the new employee orientation to review the company policies and rules included in the Employee Handbook. The new employee then signs a written statement acknowledging receipt of the handbook, acceptance of responsibility for reading and complying, and understanding where to direct questions.
Employee Lease Agreement Addendum	<p>All employees living onsite should have a written lease agreement. They are subject to the same occupancy rights and restrictions as other residents.</p> <p>It's advisable to have a written agreement in addition to the lease agreement which details in writing the conditions and limitations of their occupancy.</p> <p>*These occupancy rights may differ from state to state.</p>
Additional forms and policies	You may have other forms and policies, depending on your state laws and your specific needs.

Employment Process

Slide 41

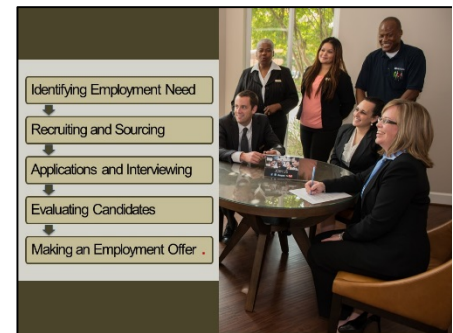
Display the section title slide and **introduce** the topic.

**Slide 42**

Display The Employment Process slide.

Click to Show each point and **Review** each step of the employment process.

Explain that this process is summarized in the Employment Process chart in the Participant Workbook.



Employment Process

Stage in Process	Description
<p>Identifying Employment Need</p>	<p>Job descriptions clearly detail the work to be performed and help ensure a proper fit.</p> <ul style="list-style-type: none"> • Review job descriptions before posting or filling any position. • Update job descriptions annually. • You may need multiple job descriptions for a position.
<p>Recruiting and Sourcing</p>	<p>Use a variety of methods to ensure you can find the best candidate for the position.</p>
<p>Applications</p>	<ul style="list-style-type: none"> • Applications must <i>not</i> request information that may be considered discriminatory. • Retain all submitted resumes and applications for one year after the date received • Make sure applications and resumes are date-stamped when received.
<p>Interviewing</p>	<ul style="list-style-type: none"> • Interviews introduce an applicant to the company and help you learn about an applicant’s skills and knowledge, accomplishments, past experiences, and how they behave on the job. • Consider the technical skills, physical requirements, and the interpersonal skills desired. • Most property management jobs require some weekend and evening hours; determine in advance whether that is acceptable to the applicant. • Develop and use consistent interview guides for each position. • Use open-ended questions and behavioral interviewing techniques.
<p>Evaluating Candidates</p>	<ul style="list-style-type: none"> • Use pre-employment tests if applicable. • Check references and criminal background. • Conduct drug tests. • Refine the candidate pool by: <ul style="list-style-type: none"> ○ Using your interview evaluation form ○ Verifying references ○ Conducting second interviews ○ Using pre-employment screening agencies
<p>Making a Conditional Offer</p>	<ul style="list-style-type: none"> • A conditional offer is contingent upon satisfactory references and results of tests and background checks. • It includes a criminal background screen, a credit check if applicable, a drug screen, and various letters and paperwork. • Typically handled via written letter so that there is no confusion about what has been offered by the employer and accepted by the candidate.

Identify Employment Need

Slide 43

Display Identify Employment Need slide.

Explain that the first step of the employment process is to identify the need of the property.

Click and Explain that a CAM should compare this need to common job descriptions. Using job descriptions as the basis for hire ensures a proper fit for the need.

Identifying Employment Need

Identifying Employment Need
 ↓
 Recruiting and Sourcing
 ↓
 Applications/Interviewing
 ↓
 Evaluating Candidates
 ↓
 Making a Conditional Offer

Job descriptions clearly detail the work to be performed and will help ensure a proper fit for the need .

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Job Descriptions

Slide 44

Display Job Descriptions slide.

Click to Show each point and **Review** the role of job descriptions in identifying employment needs.

Remind the participants that sample job descriptions are in the CAM Reference Guide found the Candidate Resources section of the NAA website.

Job Descriptions

- Ensures a proper fit for the need
- Eliminates confusion about job responsibilities and expectations
- Ensures compliance with ADA
 - Identifies all of the requirements for the job
 - Outlines essential and non-essential functions of the job .

Slide 45

Display Maintaining Job Descriptions slide.

Click to Show each point and **Review** the tasks a CAM should perform to maintain job descriptions.

Maintaining Job Descriptions

- Because job responsibilities change frequently, review job descriptions before posting or filling any position
- Update job descriptions annually
- You may need multiple job descriptions for a position .

Slide 46**Display Activity:** Job Synopses slide**Objective:** Identify essential and non-essential job functions to ensure compliance with ADA standards**Duration:** 15 minutes**Instructions:**

- **Transition** “To review the major positions for site personnel on a property, we will complete a group activity. As each group shares their results, you will become familiar with each major job description.”
- **Assign** a sample job synopsis to each group from the Sample Job Synopses table in the Participant Workbook (also included below.)
- **Instruct** participants to read the job descriptions and:
 - Identify if they are complete
 - Identify essential and non-essential job functions

Debrief:

- **Ask** participants share their sample job descriptions and:
 - What they would add that is missing
 - Essential and non-essential job functions
- As groups share, **ensure** essential and non-essential job functions are listed correctly.
- **Reinforce** the importance of essential and non-essential designations in relation to ADA compliance.

Activity: Job Synopses**Instructions:**

- Using your assigned sample job synopsis:
- Identify essential and non-essential job functions
 - Are there essential functions missing? .

Sample Job Synopses

Position	Sample Job Description
<p>Regional Manager</p>	<p>The Regional Manager is responsible for all operational and financial aspects of an assigned portfolio of properties with 2,400-5,000 units. Portfolio size may range from 2-10 properties depending on size and complexity.</p> <p>The position directs and coordinates all activities of the properties in their portfolio to ensure that company and/or owner (if applicable) financial and business objectives are achieved.</p> <p>Results are achieved through successful implementation of comprehensive programs, initiatives, and strategies that promote the achievement of optimum performance by the properties within their portfolio.</p> <p>The position reports to the Vice President - Property Operations. It manages two or more Senior Property Managers and/or Property Managers who supervise onsite personnel. Incumbents may also have responsibility for asset management and have Asset Managers reporting to them.</p>
<p>Senior Property Manager</p>	<p>The Senior Property Manager’s (SPM) responsibilities are the same as the Property Manager with one exception – the SPM oversees two or more properties.</p> <p>The SPM is responsible for all operational and financial aspects of each assigned property and meeting company goals in those areas.</p> <p>Results are achieved by facilitating the optimum performance of each assigned property in areas such as personnel management, leasing, collections, resident services, maintenance, revenue enhancement, capital improvements, information reporting, and compliance with all applicable laws and company policies.</p> <p>The position reports to the Regional Manager - Property Operations and supervises all onsite personnel in the leasing and maintenance areas of each assigned property.</p>
<p>Property Manager</p>	<p>The Property Manager is responsible for all operational and financial aspects of a property with 300-500 units and meeting company goals in those areas.</p> <p>Results are achieved by facilitating the optimum performance of the property in areas such as personnel management, leasing, collections, resident services, maintenance, revenue enhancement, capital improvements, information reporting, and compliance with all applicable laws and company policies.</p> <p>The position reports to the Regional Manager - Property Operations and supervises all onsite personnel in the leasing and maintenance areas.</p>

Position	Sample Job Description
<p>Assistant Property Manager</p>	<p>The Assistant Property Manager (APM) is responsible for the efficient operation of the assigned property under the direction of the Property Manager. The APM works closely with the Property Manager in preparation for movement into a Property Manager position. The APM assumes responsibility for the operation of the property in the absence of the Property Manager. On a daily basis, the APM performs the tasks associated with the operation of the property including:</p> <ul style="list-style-type: none"> • Leasing • Collections • Resident services • Maintenance • Actions to ensure compliance with all applicable laws and company policies <p>The position reports to the Property Manager (or Senior Property Manager, if applicable) and generally has no supervisory responsibilities unless the Property Manager is unavailable or away from the property.</p>
<p>Leasing Manager</p>	<p>The Leasing Manager:</p> <ul style="list-style-type: none"> • Supervises a staff of Senior Leasing Consultants and Leasing Consultants • Is responsible for developing and implementing a leasing plan to attract new residents and retain current residents • Is accountable for training staff, budgeting, scheduling, and managing all personnel matters regarding hiring, termination, performance reviews, and service issues with residents and clients
<p>Leasing Consultant</p>	<p>The Leasing Consultant’s primary responsibility is the performance of all activities related to apartment rentals, move-ins, and lease renewals. The Leasing Consultant:</p> <ul style="list-style-type: none"> • Interacts directly with prospective and current residents to achieve maximum occupancy, including generating and handling traffic, leasing apartments, qualifying prospects, preparing lease documentation, and completing move-in paperwork and procedures • Performs all of the above in accordance with applicable laws and company policies • Assists with the company’s on-going relationship with the residents throughout their tenancy <p>The position may report to the Leasing Manager, the Property Manager, or Senior Property Manager and has no supervisory responsibilities.</p>

Position	Sample Job Description
<p>Maintenance Manager</p>	<p>This maintenance position oversees the efforts of a property with more than 500 units in the areas of inspection, maintenance, and repair. This position’s time is involved in the direct management of the onsite maintenance staff at each assigned property.</p> <p>The position is responsible for ensuring that the physical aspects of each assigned property meet the company’s established standards and any applicable laws. This is done for safety, appearance, and operational efficiency reasons and must fall within the budgeted financial goals.</p> <p>This position leads the onsite maintenance staff in diagnosis of problems and repair in areas such as HVAC, electrical, plumbing, pool, carpentry, dry walling, exterior structural, and appliance.</p> <p>The position reports to either the Regional Manager - Property Operations or the Property Manager and supervises all onsite personnel in the maintenance area.</p>
<p>Maintenance Technician</p>	<p>This position functions in a support role to the Maintenance Manager. It is responsible for ensuring that the physical aspects of the property meet the company’s established standards and any applicable laws.</p> <p>The Maintenance Technician diagnoses problems and makes repairs in areas such as HVAC, electrical, plumbing, pool, carpentry, dry walling, exterior structural, and appliance. Incumbents may be certified in one or all of the skilled trades in which they are responsible.</p> <p>The position reports to the Maintenance Manager and has no supervisory responsibilities.</p>
<p>Make Ready/ Maintenance Assistant</p>	<p>This position:</p> <ul style="list-style-type: none"> • Handles service requests for repairs and improvements • Assists with preparing or prepares vacant apartments for market ready condition • Performs various non-technical functions such as maintaining exterior lighting, ground equipment repair and preventative maintenance, caulking, touch up painting, pool maintenance, lock repairs, etc. • Provides assistance to the maintenance staff as needed • Reports to maintenance manager

Position	Sample Job Description
<p>Grounds keeper</p>	<p>The Groundskeeper is responsible for the overall upkeep of the property landscape and the exterior image. Duties include:</p> <ul style="list-style-type: none"> • Cleaning of the driveways, parking lots, curbs, dumpster areas, exterior hallways, or any other public areas • Maintaining the property (flowerbeds, plants, and grass areas) • Snow removal • Pool cleaning or routine pool maintenance <p>The position reports to the Maintenance Manager or Property Manager and has no supervisory responsibilities.</p>
<p>Painter</p>	<p>This position is responsible for painting the interior and/or exterior areas of the property. This includes such tasks as:</p> <ul style="list-style-type: none"> • Assistance with scheduling of make ready units • Preparing of the area to be painted • Painting designated areas • Cleaning up of areas after painting • Maintenance of the inventory of painting supplies and equipment <p>The position reports to the Maintenance Manager or Property Manager and has no supervisory responsibilities.</p>
<p>Housekeeper</p>	<p>The Housekeeper is responsible for cleaning and maintaining the appearance of property models, vacant units, and public access areas including the office and clubhouse, cleaning apartments after move-out and preparing them for new residents.</p> <p>This position is also responsible for the maintenance of the inventory of cleaning supplies and equipment.</p> <p>The position reports to the Maintenance Manager or Property Manager and has no supervisory responsibilities.</p>

Recruitment Methods

Slide 47

Display Recruiting and Sourcing slide.

List recruitment and sourcing methods.

Ask participants to review the Recruitment Methods information in their Participant Guide (also included below.) **Allow** 5 minutes.

Note that a lot of sourcing is done online, but some candidates still do not have access to online resources. CAMs should use a variety of online and offline methods to reach potential applicants—especially maintenance candidates.

Solicit and Answer any questions about recruitment methods.



Recruitment Methods

Recruitment Method	Details
Current Employees as Candidates	Competent, experienced company employees should be given an opportunity to apply for open positions.
Current Residents as Candidates	Remember to include residents in your overall recruitment program. Send a flyer or keep a constant reminder in your monthly newsletter.
Networking	<ul style="list-style-type: none"> • Call other managers • Check apartment association job banks or registries • Network among residents, friends, business employees, company peers and family
Employee Referral Programs	<p>Offering employees a recruitment bonus involves every employee in your search:</p> <ul style="list-style-type: none"> • Offer a cash bonus; typically from \$100 to \$500 • Provide a sliding scale for the bonus based upon the new employee’s salary/position or the total number of people referred within a period of time • Can tie bonus payments to the longevity of the new employee <ul style="list-style-type: none"> ○ 25% paid upon hire, 50% at six months of service, 25% at one year of service

Recruitment Method	Details
Advertising	<ul style="list-style-type: none"> ● Print media <ul style="list-style-type: none"> ○ Classified section of the local newspapers ○ Apartment association publications ○ Minority, women’s, and/or neighborhood publications ● Online resources <ul style="list-style-type: none"> ○ Work for you 24 hours a day ○ Room for graphics and information about the company, benefits, & position <p>Watch for the following when placing the advertisement:</p> <ul style="list-style-type: none"> ● No language indicating preference for a particular protected class; sex neutral job title ● Always use the Equal Employment Opportunity (EEO) abbreviation, logo, or wording ● Avoid narrow or limited recruitment sources
Employment Agencies	<ul style="list-style-type: none"> ● Various types of employment agencies may be helpful. ● State unemployment agencies for unskilled labor or when unemployment is high ● Temporary agencies that specialize in apartment employees ● Employment placement firms (also called executive recruiters) for specialized positions such as property supervisors and management company executives <p>Note: agencies handle the recruiting and screening of candidates, and require payment of a fee for a hired candidate, usually based on the new employee’s salary.</p>
Online Resources	<p>Places you can post jobs online include:</p> <ul style="list-style-type: none"> ● Your property or company website ● RPMcareers.org ● NAAEI career website ● General job posting websites
Social Media	<p>Social recruiting (social hiring or social media recruitment) is recruiting candidates by using social platforms such as LinkedIn, Facebook, and Twitter.</p>
Career Fairs	<p>Career fairs offer a great opportunity to meet potential candidates in person. However, make sure you are utilizing various career fairs and not just the same one again and again. This could create, inadvertently, some discriminatory practices if the same type of person is continually being hired.</p>
Newspapers	<p>Place a job posting in local newspaper listings. Some candidates still do not have access to online resources. Use a variety of online and offline methods to reach potential applicants—especially maintenance candidates.</p>
Unsolicited Resumes and Applications	<p>Employers are not required to consider unsolicited resumes or applications. If your company does not consider them, think about a procedure to notify applicants.</p>

All resumes and applications submitted must be retained for one year after the date received by the company.

Slide 48

Display Online Recruiting slide.

Explain that candidates today are looking online for jobs; in order to attract applicants, employers need to post online.

Click to Show each point and **List** online resources where a CAM can post job openings.



Slide 49

Display Social Media Recruiting slide.

Click to Show each point and **Review** reasons CAMs should look for candidates on social media sites.

Click and Read key point.

Optional statistic: 76% of social job seekers found their current position through Facebook.¹



Slide 50

Display and Read the quote on the slide.



Source: Jobvite Job Seeker Nation Study - 2014

Applications

Slide 51

Display Sourcing Maintenance Personnel slide.

Explain that maintenance technicians are often the toughest candidates to find.

Click to Show each bullet and **Review** key points about sourcing maintenance personnel.

Ask participants which sources they find most beneficial.

Slide 52

Display Applications and Interviews slide.

Click to Show each bullet and **Review** key points about applications and interviews.

Slide 53

Display Employment Application Exclusions slide.


Explain that applications must not request information that may be considered discriminatory

Click to Show each point and **Review** what questions should not be included to prevent being discriminatory or unlawful.

Sourcing Maintenance Personnel


Where can you find good maintenance candidates?

- Vendor referrals
- Association job banks
- Hospitality industry
- Construction companies
- Hospitals
- Technical schools
- Former military personnel
- Commercial real estate companies
- Rural areas where farmers have mechanical skills
- NAA Career Center:
www.RPMcareers.org/employers



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Applications and Interviews




- Do not request information that may be considered discriminatory
- Interviews introduce an applicant to the company
- Interviews help you discover skills and knowledge, accomplishments, past experiences, and how they behave on the job
- Retain all submitted resumes and applications for one year after the date received

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Employment Application Exclusions

Do not include questions that may reveal:

- Race/ethnicity, sexual preference/orientation, or religion
- If applicant is pregnant, has children or needs child care
- Military, reserve or federal/state guard status
- Health or medical conditions
- Sex, weight, height, or age
- Marital/divorce status
- Citizenship



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Interviews

Slide 54

Display Selecting Candidates to Interview slide.

Explain that while they review the job description for the position to be filled, CAMs should consider the technical skills, physical requirements, and the interpersonal skills desired.

Click and Explain that as they study the application/resume CAMs should outline questions & concerns.

Click and Explain that phone screening allows a CAM to start evaluating an individual's potential as an employee and learn some basic information.

Provide an example of a "deal killer" if needed:
If the applicant requires a higher salary than is allowed by your budget, confirm this is the minimum they will accept, explain that your salary level is below the minimum and do not extend an interview invitation.

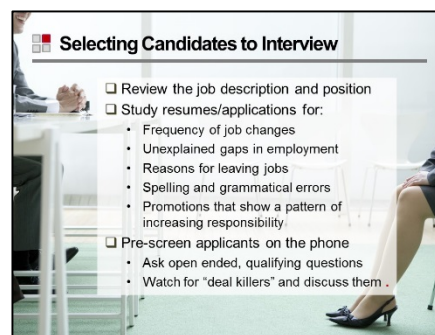
Mention that most property management jobs require some weekend and evening hours. A CAM should determine if the applicant accepts that.

Slide 55

Display Additional Considerations slide.

Click to Show each point and **Review additional** things to consider about applicants.

Ask participants which they feel is the most important of these considerations.



Slide 56

Display Interviews slide.

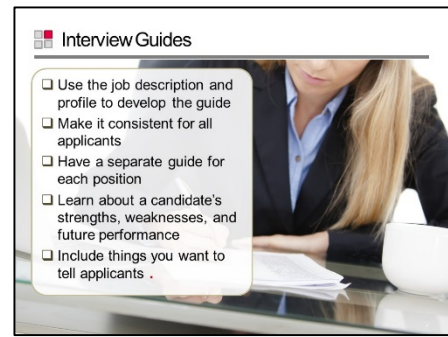
Explain that in order to conduct a successful interview a CAM needs to be prepared. An Interview Guide is key to this preparation.

Click to Show each point and **Review** key points about developing and using interview guides.

Explain that profile criteria include areas like integrity, motivation, capacity, understanding, knowledge and expertise.

Note that things to tell applicants include:

- Information about the company
- Opportunities within the company
- Information about the property
- Information about the team they would be joining

**Reference Guide**

Refer participants to the CAM Reference Guide document for an **interview guide sample**. Also available at:

<http://www.naahq.org/learn/education/candidate-resources>

Slide 57

Display Activity: What Can You Ask? slide

Objective: Identify questions that are legal/illegal to ask during an employment interview

Duration: 10 minutes

Instructions:

- **Instruct** participants to identify if the questions in the What Can You Ask? list in their Participant Workbook (also included below) are legal or illegal to ask during an employment interview. **Allow** 5 minutes to complete.

Debrief:

- **Tell** participants that all the questions are illegal!
- **Ask** if anyone is surprised by that, and if so, which questions stumped them.
- **Direct** participants to Examples of Acceptable/Unacceptable Interview Questions in their Participant Workbook (also included below.)
- **Ask** participants to compare the questions on the worksheet to the sample.
- **Reinforce** the importance of interview guides and their role in maintaining compliance with employment laws.

 **Activity:** What Can You Ask?**Instructions:**

Place a check mark in the appropriate space to show whether the question is legal or illegal to ask during an interview .

What Can You Ask?

Legal	Illegal	Question
		1. You know how one's perspective about their job changes when you get past forty, don't you?
		2. That's an interesting pronunciation of your last name. What nationality is that?
		3. I see from your application that you ski. Have you gone to any singles ski weekends near here?
		4. I guess anyone who was in the Special Forces must have an honorable discharge. Do you?
		5. Who cares for your children?
		6. You look pretty young to have all this experience. What year did you graduate from school?
		7. What physical handicaps do you have?
		8. Do you plan to have more children?
		9. You say you contribute a lot of your spare time to church activities. What church is it?
		10. Do you own your home? Rent? Live with your parents?
		11. You're from a tough neighborhood. Were you able to survive without problems with police?
		12. How much do you weigh?
		13. What clubs and organizations do you belong to?
		14. Would your husband care for your children if your job required you to be away overnight?
		15. Since you're a woman, do you feel you will be able to sell effectively to men?
		16. What type of military discharge did you receive?
		17. What would you do if your husband got a job in another state?
		18. Do you think someone of your race would have a problem working in this area?
		19. Is there any history of mental disorders in your past?
		20. That's a beautiful diamond you have. Are you engaged?
		21. An attractive woman like you must be married. Are you?
		22. Do you think being a male will be helpful in dealing with this type of clientele?
		23. Where was your wife born?
		24. Is it "Miss" or "Mrs." Jones?
		25. Please don't be offended by this standard question. Have you ever been arrested?
		26. As a woman, will you have difficulty learning technical material or relating it to male customers?

Examples of Acceptable/Unacceptable Interview Questions

Subject	You “May NOT” Ask	You May Ask
Age	<ul style="list-style-type: none"> How old are you? What is your date of birth? 	If hired, can you provide proof of minimum age?
Arrests/ Convictions	<ul style="list-style-type: none"> Have you ever been arrested? Check with state and local laws 	Have you ever been convicted of a crime?
Birthplace	<ul style="list-style-type: none"> Where were you born? What country are you from? 	If hired, can you provide employment eligibility verification?
Citizenship	<ul style="list-style-type: none"> Are you a U.S. citizen? 	If hired, can you provide employment eligibility verification?
Drugs/Alcohol	<ul style="list-style-type: none"> Have you ever participated in a drug rehabilitation program? 	Are you currently using illegal drugs?
Education	<ul style="list-style-type: none"> When did you graduate? What year did you graduate? 	List of academic, vocational, or professional education.
Height/Weight	<ul style="list-style-type: none"> How tall are you? 	No acceptable questions.
Marital/Family Status	<ul style="list-style-type: none"> Are you married? Do you have any children? How many children do you have? What are the ages of your children? Are you pregnant? Are you single? Divorced? Widowed? 	No acceptable questions.
Military Record	<ul style="list-style-type: none"> Were you honorably discharged from the military? 	Are you a veteran of the Armed Forces?
National Origin/Ancestry	<ul style="list-style-type: none"> Where were you born? What country are you from? 	Fluency in language if it is job related.
Photographs	<ul style="list-style-type: none"> For a photo ID with the employment application. 	For a photo ID after hire.
Race/Color	<ul style="list-style-type: none"> What is your ethnicity? 	No acceptable questions.
Religion	<ul style="list-style-type: none"> What church do you attend? 	Shift availability. Are you available to work weekends/holidays?
Residence	<ul style="list-style-type: none"> Do you own or rent? Do you own your home? 	Present address.
Sex (gender)	<ul style="list-style-type: none"> Are you male or female? 	No acceptable questions.

Subject	You “May NOT” Ask	You May Ask
<p>Disability</p>	<ul style="list-style-type: none"> • Do you have a disability? • What is the nature or severity of your disability? • Have you filed any claims for workers’ compensation? • How did you become disabled? • What is your prognosis? • How often will you require leave for treatment of your disability? • Have you or any of your dependents ever had or been treated for any of the following conditions or diseases... • Please list any conditions or diseases for which you have been treated in the past three years. • Have you ever been hospitalized? • Have you ever been treated by a psychiatrist or a psychologist? • Have you ever been treated for any mental condition? • Is there any health-related reason you may not be able to perform the job for which you are applying? • How many days were you absent from work because of illness last year? • Do you have any physical or mental defects that preclude you from performing specific kinds of work? • Do you have any disabilities or impairments that may affect your performance in the position for which you are applying? If so, identify any accommodations that would enable you to perform the job. • Are you taking any prescribed drugs? • Have you even been treated for drug addiction or alcoholism? • Are you involved or have you been involved with an individual diagnosed with the HIV virus? • Do you wear contact lenses? 	<p>Can you perform the essential functions of the job with/without reasonable accommodation?</p>

Interview Questions

Slide 58

Display Open-Ended Questions slide.

Explain that questions should allow the applicant to expand upon the skills and qualities possessed to do the work.

Click and **List** topics to include in open-ended questions.



Slide 59

Display Behavior-Based Interviewing slide.

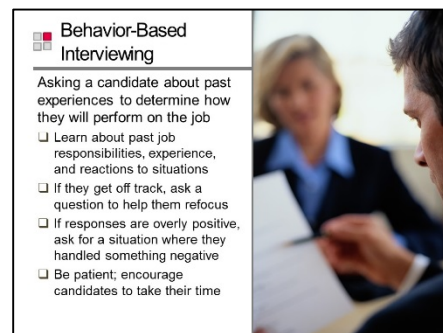
Define Behavior-Based interviewing

- Asking a candidate questions about how they handled a particular situation in a previous job; their answers are the best predictors of how they would respond in the future

Click to Show each point and **Review** key points about behavior based interviewing.

Provide examples as needed:

- “Tell me about a time you had an irate resident come into your office while you were taking with a new prospect. How did you handle it?”
- “Tell me about a time you worked with a particularly difficult prospect to help them find an apartment. How were you able to close the sale? Were they happy after they moved in?”
- “You’ve given me the strong impression that you always follow policies and procedures. Tell me about a time when you felt it was appropriate to do something that was not in compliance with policies and procedures.”



Slide 60

Display Activity: Develop Interview Questions slide

Objective: Practice developing questions applicable to specific job positions

Duration: 15 minutes

Instructions:

- **Assign** a specific job position from the Creekwood Job Descriptions in the case study to each group and provide its job description.
- **Instruct** groups to create 3-5 interview questions for the position.

Debrief:

- **Ask** volunteers to share some of the questions they developed.
- **Ask** the class to identify the purpose of the question.
- **Guide** the conversation towards the value of behavioral interviewing.
- **Reinforce** the importance of interview guides.

 **Activity:** Develop Interview Questions**Instructions:**

Using your assigned job position from the Creekwood Job Descriptions in the case study, create 3-5 interview questions specific to the position .

The Interview

Slide 61

Display Interview Guidelines slide.

Click and Explain that during this stage of the interview a CAM will use their prepared questions and their communication skills, and be sure at the end that they have a good sense of the applicant's strengths, weaknesses, and future job performance.

Note that a CAM might consider sending interviewees the job description so that they can review it in advance of the interview.

Remind participants there are fully developed interview guides in the CAM Reference Guide.

Click to Show each point and **Review** key points about conducting interviews.

Slide 62

Display Conducting an Interview slide.

Click to Show each point and **Review** guidelines about conducting interviews.

Note that when a CAM takes notes during an interview, their comments must be objective; written notes are discoverable in a court of law.

Evaluating Candidates

Slide 63

Display Evaluating Candidates slide.

List the ways a CAM can evaluate candidates. These are all forms of analyzing data.

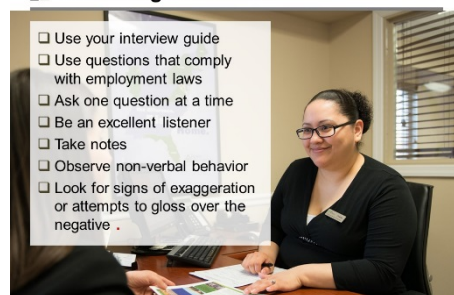
Interview Guidelines

- Have paperwork & tests ready
- Use a private, comfortable setting
- Start informal conversation to build rapport
- Describe the job and skills you are looking for
- Explain the interview process
- Ask the applicant if they have any questions for you
- Explain when they can expect to hear from you .



Conducting an Interview

- Use your interview guide
- Use questions that comply with employment laws
- Ask one question at a time
- Be an excellent listener
- Take notes
- Observe non-verbal behavior
- Look for signs of exaggeration or attempts to gloss over the negative .



Evaluating Candidates

- Identifying Employment Need
 - ↓
 - Recruiting and Sourcing
 - ↓
 - Applications and Interviews
 - ↓
 - Evaluating Candidates**
 - ↓
 - Making a Conditional Offer
- Interview evaluation forms
 - Verifying references
 - Second interviews
 - Skills, aptitude and honesty tests .

Slide 64

Display Pre-Employment Testing slide.

Explain that it is common practice to conduct pre-employment tests such as skills tests, honesty tests, and aptitude tests. Any tests that are administered should be approved by a Human Resources professional.

Click to Show each point and **Review** information about various types of pre-employment testing.

Emphasize that every person applying or interviewing for like positions requiring tests should be tested.

Slide 65

Display Check References slide.

Click to Show each point and **Review** key points about checking references and background. Remember that criminal checks come later in the interview process.

Slide 66

Display Evaluating Candidates slide.

Click to Show each bullet and **List** things a CAM should consider when evaluating a candidate.

Pre-Employment Testing

- Ask your local HR department about applicable tests
- Topics include:
 - Skills
 - Aptitude
 - Honesty
- Skills tests must be directly related to the job
- If a position requires a test, every applicant for that position must take it
- Do not create your own tests .

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Check References

Check applicants' references and driving record, and conduct drug tests

- Uncover things beyond qualifications and skills
 - Gain insight into interpersonal relations
 - Make the best hiring decisions .

Evaluating Candidates

- Evaluate a candidate's:
 - Verbal communication skills
 - Listening skills
 - Behavioral characteristics
 - Appearance and over all professionalism
- Ensure a candidate:
 - Has skills that match job requirements
 - Meets requirements for education, experience, technical skills

Slide 67

Display Refine Candidate Pool slide.

Review the purpose of interview evaluation forms and how to use them. Remind students that there is a sample form in the CAM Reference Guide.

Click and Review key points about verifying references.

Click and List the tools a CAM should have available for a second interview.

Click and List the type of information pre-employment screening agencies can provide.

Refine Candidate Pool

Interview Evaluation Form

- Focuses on relevant issues
- Is attached to application & file
- Documents that applicants were evaluated in the same way

Verify References

- Be consistent
- Include the same number for all candidates
- Request only related information
- Respect applicants' privacy
- Comply with FCRA and state law
- Keep reference documentation

Second Interview

- Employment application
- Skills test(s)
- Position description
- Job profile
- Interview evaluation form
- Reference verification .

Slide 68**Individual/Large Group Activity:** Evaluate a Candidate Survey

Objective: Analyze a candidate and employ decision making skills about hiring

Duration: 10 minutes

Instructions:

- **Instruct** participants to assess whether they would hire a candidate to work in their case study property.
- **Direct** participants to the following Candidate Survey resources in their Participant Workbook:
 - Job description for the position
 - Interview results
 - Interview evaluation form
 - Pre-employment test results

Debrief:

- **Conduct** a survey by raise of hands to see if participants would hire the candidate.
- **Ask** volunteers to share their reasons for hire/not hire.
- **Lead** a discussion about what resources to use when evaluating candidates and what to look for.
- **Reinforce** the importance of using an Interview Evaluation form and Job Descriptions to ensure candidates meet minimum standards.

 **Activity:** Evaluate a Candidate Survey**Instructions:**

Use the following scenario to assess whether you would hire Mary. Be sure to look at:

- Job description for the position .
- Interview results
- Interview evaluation form
- Pre-employment test results

Candidate Survey

Job Description

The Leasing Consultant's primary responsibility is the performance of all activities related to apartment rentals, move-ins, and lease renewals. The Leasing Consultant:

- Interacts directly with prospective and current residents to achieve maximum occupancy, including generating and handling traffic, leasing apartments, qualifying prospects, preparing lease documentation, and completing move-in paperwork and procedures
- Performs all of the above in accordance with applicable laws and company policies
- Assists with the company's on-going relationship with the residents throughout their tenancy

The position may report to the Leasing Manager, the Property Manager, or Senior Property Manager and has no supervisory responsibilities.

Interview Results

Mary arrived at your office exactly at interview time. She was rushed but regained her composure quickly. She was seated by your leasing professional and given the company application to complete. She responded that she had brought a resume and would use that. The leasing agent explained the company policy on all candidates completing the application. After 15 minutes, she turned it in and the leasing professional brought it to you. It was hastily written and some blanks had abbreviations you did not understand. You were now 20 minutes into the 45 minutes you had allotted to this interview. Your next appointment with your supervisor's conference call could not be delayed.

Mary is brought to your office and seated. She is dressed in appropriate business casual attire and carries a large handbag and small iPad holder. She takes out her phone and rests it in her lap after turning the sound to off. She is well spoken – although perhaps speaks a little quickly. You notice she uses the terms “tenant” and “complex”. A couple of your questions need to be repeated or clarified. Did Mary listen well or did you not ask directly? In your behavioral questioning, Mary explains how valuable she is and that few, if any problems were ever encountered in her current position. During the interview, she hits the phone button occasionally to check the time. She makes good eye contact, but frequently looks around your office, taking in its appearance. When you ask if she is looking for something, she replies that she is simply checking it out.

After several minutes of questions and answers, you end the interview and explain to Mary what will happen next. She seems eager to leave, explaining she has other appointments and thanks you for your time.

Interview Evaluation Form

Background Review

1. What would your current employer have to do to keep you?

I am not sure they could do anything. It's an okay company to work for, but everything has sort of fallen into habit and there is nothing new I am encouraged to do. There's just a sort of daily grind. Even if they offered me more money, I am just not going to be happy where I feel like I am just part of a process more than I am a contributor. My manager is fine, but I just don't feel like there is a connection with the corporate office and my property team.

2. In your last job, for which tasks did you have full responsibility?

Since we have only 4 people in the office if we are all there, I am completely responsible for handling all initial prospect or visitor contact – phone, email or walk in. I verify applications, process them through our screening software and complete all the paperwork for new leases to be reviewed and approved by the manager. I write up work orders and post completed work orders to the system daily. I make both leasing and maintenance follow-up calls. I check for email leads every two hours. I make suggestions to the corporate office who posts on our social media accounts at Facebook and Twitter. I complete the monthly market survey reports by calling our comps. I am also responsible for pulling the daily activity report and proofing the weekly activity report on our property management software. Each month I distribute renewal letters and follow-up with residents who have not responded. If I have time, I love reaching out to our area retailers to see if we can have a relationship.

Leasing and Sales

1. How many prospects do you handle in a day? How do prospects come to your property? What was your closing ratio – how many sales did you close on the average in a week?

In a typical day I usually get 8 phone calls, maybe 4 email leads from our ILS provider, another 3 from our website and maybe 2 that just walk in. We just added a mobile app, but not seeing much yet from that. I rarely see anything from apartmentratings.com. I think the manager sees those.

It's hard to say what is an average close for me – it varies really on the applicant and how urgent their need is to lease an apartment. If there is someone who needs to get this arranged, I can close them at least 50% of the time. If they are just looking or just started looking and have a lot of lead time, I may not be able to get a deposit, but I see that as a chance to do a lot of follow-up!

2. How did your sales effort affect the profitability of your property?

Our manager does a great job in weekly staff meetings about reminding us how much value each lease brings to the property. I focus on a lease at a market rent, but she has taught us to see the annual value—like a lease I closed at \$1,115 a month was really \$13,380 to the property. If I give that prospect a concession, it really just takes money away from the owner.

Administrative

1. What types of reports (program or property) did you have to generate and how often? How were those reports used at the property?

I do a daily activity report, maintain a traffic log, record guest visits and phone calls. I also do the weekly activity report and keep the renewal log up to date with contacts and results. I input completed work orders each day to the weekly roll-up is accurate.

Customer Service

1. Describe an instance in which you handled a difficult resident or customers. What was the outcome?

There is one resident on our property that is always upset about something. Either a work order was late, or kids were noisy outside, or a piece of trash landed on her patio—almost every day it's a little thing. She gets angry and usually yells aggressively. One day she came in to complain about something and she wasn't yelling so much as it seemed she was depressed or this had really gotten to her. So I mentioned that I was sorry that the oversight had really seemed to upset her. I didn't say anything about the fact that she wasn't yelling, but had just seemed to have given up. She stopped for a minute and sat down and explained a personal issue she was dealing with. She actually opened up. It hasn't changed her attitude completely, but she seems to have taken a little less aggressive position on her complaints since then.

2. Did you make any suggestions in any previous job to improve morale, increase output or increase customer satisfaction? What were they?

At my current job, I mentioned that it was sort of in a rut in terms of what I was doing. We recently got some pressure from our owner to move the rents up even more and be faster about getting vacancies filled. We had been working hard so this just seemed like more work and less appreciation. That's what I felt anyway—but I tried to take the high road and be positive at the next staff meeting. My manager reviewed more about what the owner wanted and tried to do a "go get 'em" speech and I spoke up and tried to explain how doing what the owner wanted would just make it easier for us in the long run. I mentioned to the other office staff that more leases meant more bonuses and we should make it a game to make sure no one left the presentation without giving us at least an application fee. Same thing for the maintenance, once they could get the units sparkling and we got them leased, the fewer make readies they would have to do and the

more likely work orders from those units would be down. Everyone sort of appreciated that but it didn't last long.

Follow-Up

1. Describe to me how you organize your day. What types of “tools” or methods you have used to manage your time?

There are a couple of things I do – first, I end my day by clearing and organizing my desk – I try not to leave any papers or open tasks sitting on top of the desk – it just makes me feel stressed when I walk in the next morning. I also use my Outlook calendar for everything! Even if it's just to remind me to “sparkle” up the show units, or check a particular area on the property where I noticed trash the day before to see if there is more today. I am a huge fan of “appointments” so I get a tickler. I like to cross things off on lists so I make a short to-do list at the end of the day. I used to make long ones and put everything on it, but so many times I couldn't cross off a lot and that frustrated me. So now I keep it simple.

Decision Making

1. What types of decisions do you make in your current role, without first checking with your manager? On what types of decisions do you ask for input prior to making a decision?

I make standalone decisions about when I do my daily tasks as long as they are done by the deadline – like sparkling the show units, or walking the grounds, or doing call backs on work orders. If the resident is not happy I will make a decision about asking maintenance to return – although I will always say I need to check with today's work schedule. I decide what comps I shop and what information I tell them in return. I decide which work order call deserves special handling – without being discriminatory. I would never approve or disapprove an application or sign contracts or leases. I can make suggestions about work order or things I see that need to be done on the property exterior, but I can't assign those a priority.

Risk Taking and Action Orientation

1. Can you recall an instance in which you had to take a risk on a job? What was the situation and what made it risky? What happened?

I don't take many risks or what I consider risks. When I spoke with that resident about her being upset and almost defeated by her complaint, I guess I risked her becoming even more angry and outspoken. Either I must have said it right or she was really feeling defeated, that she accepted my concern and opened up. That could have backfired, but I think my role on the team is all about appreciating our residents – even this one that is constantly complaining about something. She could have gotten really mad and gone to my manager, but she didn't.

Change and Stress

1. Describe a change that took place in your last job that you found difficult to understand or accept. What was the situation and how did you adapt to the change?

On this job, we recently had a change of supervisor – that was tough. My manager really had a good relationship with the regional, but the owner on another portfolio was upset so our VP changed up portfolios a little. So we all got a new boss. I think my manager struggled the most, but the new regional led a couple of our staff meetings right after the change. They were much more direct and business-like. The previous manager was more relaxed and encouraged staffers to speak up. I was concerned that all of our staff meetings would change because our manager would have to adapt. But I still asked questions and tried to be supportive of other team members who were really more upset about how direct and commanding the new regional was. I mentioned it to my manager privately and she encouraged me to keep it light – even when the regional was in attendance. Fortunately, the regional backed off of attending our meetings each week – I think it was just to get us on the same page with her.

Problem solving

1. Tell me about a disagreement you had with your last manager or other property personnel. What was the situation and what did you do?

On my job before my current job, the manager and I did not see eye-to-eye on community service projects or any sort of community outreach. He just didn't think that we got any direct benefits from helping out at a Chamber event or being a drop-off point for the city blanket drive. We were leanly staffed and he was afraid it would take too much time, force staff to be away from the property and not net any leases. I tried to convince him of the good press we would get online and in the local paper. Also tried to assure him that we could work out a schedule for when staff members would be away but I couldn't convince him that we would be able to get additional leases or traffic because of this exposure. There was no way to track it and he was a numbers guy.

Motivation/Attitude

1. Do you see yourself as a leader or a team member?

I think I see myself more of a team member. I have a great manager to work for and I have a long way to go to be able to be a manager, but I am learning from her. I like working with a group of people who are all on the same page. I think that is where I can add the most value. I keep it light and like to make the maintenance team members laugh – maybe give them a break. I know that in a previous job, we did not have that kind of relationship on the team and I know I would not want to lead a group like that. I think it takes the right people and the right leader and I like being on that team.

2. What are the things you look for in a job?

There are a couple of things I want. I want to be respected for what I do, even if it's just leasing. If I am not good at my job, then the property can't really be successful. I also need a place where I can sort of do it my way. I know there are protocols and forms and processes a company has, but I like to do things my way. That means I like to work where I can ask why or how in order to make something better. I get frustrated when someone tells me that's just the way we do things. I also need a manager that I feel comfortable going to with a question or idea. So someone who is knowledgeable and accessible to me. I want good pay and a chance to earn more and learn more.

Summary

1. How does the position with our company "fit" with your overall career goals?

One of my goals is to grow and I see the chance to do that at this property. There are other sister properties in the area so that means there might be other opportunities. I also like the approach to supervision. It seems like everyone is happy to be here and do their job. I want to be happy in my work. I also see the chance to be able to do more outreach and try new advertising and promotion ideas—so even if I am still a leasing consultant I am doing more and different things. I like the fact that I will be able to change up my work schedule. I like that I have some operational exposure—like being a part of the inspection team and the preventive maintenance program. That's all important to me as I grow in skills and eventually move up into a more regional marketing role or even an assistant manager position.

Pre-Employment Test Results

Mary is given several pre-employment tests –

Drug Screen – comes back clean

Vocabulary Test – she misses some word definitions as well as certain industry terms – being unable to connect the term with its definition on a matching quiz.

Software Test – even though she currently works with a different software, she can effectively record traffic, move-in a prospect and issue a work order on the test data base.

Property Online Research – you ask Mary to research your property and its online presence. She is able to correctly identify online sources and even goes to reputation sites to get current information.

Leasing Demonstration – After taking Mary to the model and allowing her a few minutes to prepare, she fairly effectively demonstrated the model to you in a prospect role-play. She is a little stiff and identifies features, but not benefits or emotional appeal. When you ask what she would do at the end of the demonstration, she incorrectly says she would return to the office with the prospect and give them an application.

Credential – She is an NALP and a CAM candidate – but checking the directory she is not listed as a NALP. She explains it has lapsed.

Making an Employment Offer

Slide 69

Display Making a Conditional Offer slide.

Explain that making an employment offer includes:

- A conditional offer contingent upon the successful outcome of outstanding reference checks
- Criminal background screen
- Credit check (if applicable)
- Drug screen
- Various letters and paperwork

Slide 70

Display Conditional Offer slide.

Describe a conditional offer.

Click and List the things a CAM should review when meeting to make a conditional offer.

Mention that employment offers are typically handled via written letter so that there is no confusion about what has been offered by the employer and accepted by the candidate.

Slide 71

Display Pre-employment Screening Agencies slide.

Explain that a CAM should consider using a pre-employment screening agency. **Discuss** with the participants any experience with an agency.

List the types of information pre-employment screening agencies provide.



Slide 72

Display Employment-At-Will slide.

Click to Show each point and **Review** information about employment-at-will.

Slide 73

Display Letters and Paperwork slide.

Explain that if a CAM denies an applicant due to the results of a poor credit report, they are required by the FCRA federal law to send the applicant two written notices that identify the agency that reported the poor credit.

Click and Explain that it is good business practice to send a thank you letter to all applicants who submit a resume, complete an application, or have interviewed for the available position.

Click and Explain that a CAM may ask the applicant to start required post-hire paperwork in the interim period between acceptance of employment and the start date, although this may be considered time worked and will need to be compensated.

Explain that the applicant can bring the completed new-hire package back on their first day of work.

Employment-At-Will

- Legal concept governing the nature of employment relationship
- Confirms there is no written agreement or contract
- Allows employer *or* employee to terminate the relationship anytime
- Still subject to state and federal employment laws and regulations .

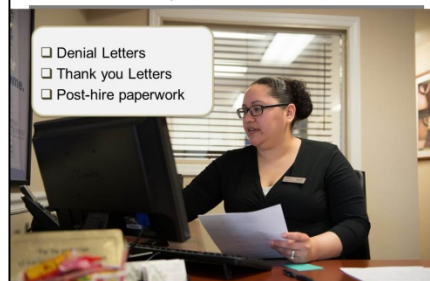


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72

Letters and Paperwork

- Denial Letters
- Thank you Letters
- Post-hire paperwork



Employee Needs throughout Employment

Slide 74

Display the section title slide and **introduce** the topic.



Slide 75

Display agenda for the section.

Click to Show each point and **List** each aspect of employment in this section.

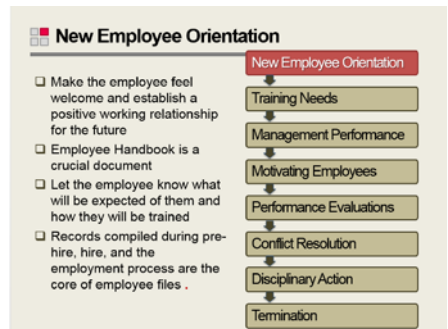


New Employee Orientation

Slide 76

Display New Employee Orientation slide.

Click to Show each point and **Review** key points about new employee orientations. This is an overview slide and more information will follow.

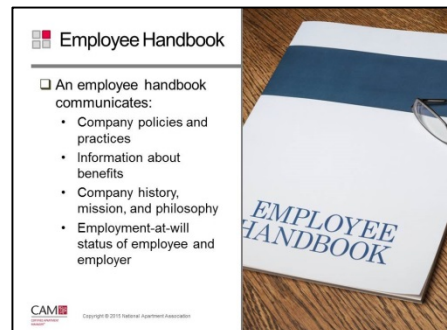


Slide 77

Display Employee Handbook slide.

Click and Explain that the most crucial document to provide an employee is a lawful, well-prepared, current employee handbook.

List inclusions in an employee handbook. Confirm with students that they have handbooks.





Reference Guide

The CAM Reference Guide lists management issues and policies that may be included in the handbook.

Slide 78

Display New Hire Orientation slide.

Click to Show each point and **Review** key points about conducting a new hire orientation.

Ask participants how they accomplish new hire orientations.

Explain that time spent now will set the tone of success for the employee.

Slide 79

Display New Hire Orientation Process slide.

Click to Show each point and **Review** the new hire orientation process.

Emphasize that by the end of the orientation the employee should be totally immersed into the “ins and outs” of the company, the property and acquainted with other team members. They should also understand what will be expected of them on the job.



Record Keeping

Slide 80

Display New Hire Record Keeping slide.

Explain that the forms and compiled records are the beginning core of the employee files and should reflect all steps of the pre-hire, hire, and employment process.

Note that once the applicant has accepted the position, a CAM must begin to compile the pre-hire and post-hire paperwork.

Remind the students that we reviewed the form descriptions previously when we discussed the Employment Records.

List the forms available at

<http://www.naahq.org/learn/education/candidate-resources>:

- Consumer Report notice and authorization
- Reference Verification worksheet
- Employee Change form
- W-4 forms
- I-9 form
- Workers' Compensation form
- State-required forms
- Employee policy/benefit documents

Remind participants that we discuss FACTA in the Legal and Resident Experience modules as well.

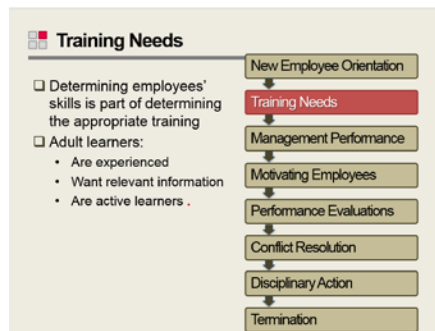
Click and Read key point on slide.

Training Needs

Slide 81

Display Training Needs slide.

Click to Show each point and **Review** key points about training needs.



Slide 82

Display Benefits of Training slide.

Click to Show each point and **List** benefits to having a well trained staff.

Provide an example about federal fair housing law: An employee – as well as the owner – can be assessed a financial penalty if a claim is validated.



Slide 83

Display Types of Training slide.

List types of training CAMs can use. Review each type with the participants. Each type of training is better defined in the CAM Reference Guide.



Slide 84

Display Professional Development slide.

Explain that their local apartment association, through affiliation with the National Apartment Association and its National Apartment Association Education Institute provides programs and certifications designed to teach members best practices and to keep them informed and current on all federal and state laws.



Review the types of certifications available.



Online Resource

For further detail **refer** participants to NAAEI Skill Standards:
<http://www.naahq.org/learn/education/find-a-course/designate-benefits>.

Management Performance

Slide 85

Display Management Performance slide.

Say “As we discuss your many responsibilities in managing your staff, we need to explore several critical skills that will assist you in accomplishing your management tasks. This is about your own management performance!”

Slide 86

Display Managing Self: Ethics slide.

Explain that performance management starts with the CAM. The CAM must follow specific rules of conduct and understand their fiduciary responsibility to the owner. Remind students that we looked at Ethics in the Industry Essentials module.

Click to Show each point and **Review** basic guidelines for ethics in the workplace.

SMART Goals

Slide 87

Display SMART Goals slide.

Click to Show each point and **Review** each component of SMART goals. Tell participants that using SMART goals will help both you and your staff accomplish tasks and improve results.

Slide 88

Display SMART Goal Examples slide.

Click to Show each point and **Review** examples of SMART goals.



Managing Self: Ethics

- Follow the law but don't hide behind it
- Keep the owner informed of all material facts
- Even if you disagree, you must follow your owner's lawful instructions
- You must act in the owner's best interest at all times
- Do not gossip; includes employees, peers, residents

SMART Goals

- S** **Specific:** clear, unambiguous, and answer the 5 Ws
- M** **Measurable:** establish what you are going to measure and how
- A** **Attainable:** set realistic expectations
- R** **Relevant:** should be tied to the employee's job functions
- T** **Time-bound:** a timeframe in which a goal should be completed .

SMART Goal Examples

- Mary will close 40% of her ILS traffic this month
- John will reduce delinquent accounts to 1% of billed rent this month
- Jody will call back 100% of guests who did not lease last month.

Chalkboard labels: Specific, Measurable, Attainable, Timely, Relevant.

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Slide 89

Display Reference: SMART Goals slide.

Refer participants to the Participant Workbook for a summary of **Writing SMART Goals**.

Review content from Participant Workbook.

 **Reference:** SMART Goals



See page the Participant Workbook for a summary of **Writing SMART Goals**.

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Writing SMART Goals

Component	Description
Specific	<p>Goals should be well defined and specific. You have a greater chance of accomplishing a specific goal than a general goal. Being specific when writing goals means you answer the 5 Ws:</p> <ul style="list-style-type: none"> • Who: Who is involved? • What: What do I want to accomplish? • Where: Identify a location. • When: Establish a time frame. • Why: Specific reasons, purpose or benefits of accomplishing the goal.
Measurable	<p>Measuring progress helps you stay on track and reach target dates. Measurement provides evidence that an employee has accomplished the goal. When possible, put concrete numbers in goals. To determine if your goal is measurable, ask questions such as:</p> <ul style="list-style-type: none"> • How much? • How many? • How will I know when it is accomplished? <p>During performance evaluations, review the goals you’ve set with the employee and discuss the results. To discuss results, you often need to use some type of measurement.</p>
Attainable	<p>Ensure your goals stretch you or your employee, but don’t make them so far out of reach they can’t be accomplished. To identify if a goal is attainable, ask if the person has the appropriate knowledge, skills, abilities, and time needed to achieve the goal.</p>
Relevant	<p>Goals should be based on the current conditions and realities of the business climate. Goals must be directly related to an employee’s job.</p>
Timely	<p>A timeframe in which a goal should be completed creates a sense of urgency and increases the likelihood of achieving the goal.</p>

S**Specific:** clear, unambiguous, and answer the 5 Ws**M****Measurable:** establish what you are going to measure and how**A****Attainable:** set realistic expectations**R****Relevant:** should be tied to the employee's job functions**T****Timely:** a timeframe in which a goal should be completed

Slide 90

Display Activity: Write SMART Goals slide

Objective: Practice writing SMART goals for on the job performance evaluations

Duration: 20 minutes

Instructions:

- **Instruct** participants to use their previously assigned Creekwood job description to write three SMART goals for a typical incumbent using the worksheet in your Participant Workbook.

Debrief:

- **Ask** participants to share their results.
- **Reinforce** key content about how to write SMART goals.

Slide 91

Display Delegation slide.

Define Delegation:

- Passing authority to an employee and holding him or her accountable for the task

Explain that delegation is more than simply scheduling work. It is an important ingredient in the overall process of employee supervision and employee development. Effective delegation is one skill with which many managers struggle. It's hard to give up a task and risk it being done incorrectly.

Click to Show each point and **Review** the purposes of delegation.

Activity: Write SMART Goals**Instructions:**

In groups, use your previously assigned job description to write three SMART goals for this position. .

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Delegation

Passing your authority to an employee and holding him or her accountable for the task

- Help employees grow in their jobs
- Organize and use your resources most effectively .



CAMI

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91

Slide 92

Display How to Delegate slide.

Click to Show each point and **Review** components of effective delegation.

Explain to participants that they should support the employee and not permit “reverse delegation,” where the employee gives up or tries to give the task back.

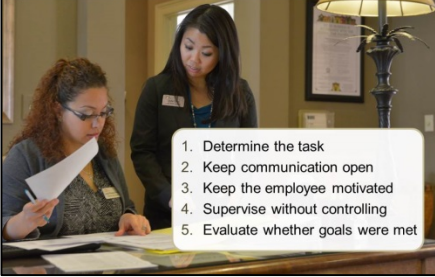
Slide 93

Display Delegation Tips slide.

Click to Show each point and **Review** Delegation tips.

Say Now let’s look at how to apply process improvement across a team to produce a better outcome.

How to Delegate



1. Determine the task
2. Keep communication open
3. Keep the employee motivated
4. Supervise without controlling
5. Evaluate whether goals were met

Delegation Tips

- Select the right person for the right job
- Performance indicates who is ready for more responsibility
- Distribute to as many employees as possible
- Allow new employees to settle in first



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Process Improvement

Slide 94

Display Trim Tab: How to Initiate Change slide.

Transition “Another important part of performance management is process improvement. I’ll show you a few videos to show you how this can work in real work places.”

Play Trim Tab video.

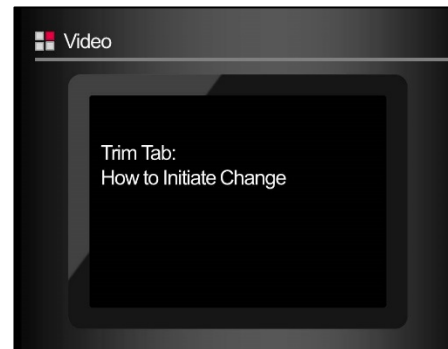
After watching the video, **guide** participants to answer the concept questions as a class.

1. How was one person able to energize a team of professionals and even a whole community?
2. Do you have a culture of doing what it takes to achieve great things?
3. How can you become a “trim tab”?

Read the summary below to **Highlight** key points about initiating change and improving processes.

A person who is a trim tab is an agent of change. He or she is always looking for ways to turn good results into great results. Although we may question whether we have a lot of influence, if we want to be great, we have to look for opportunities to have a big impact.

Solicit responses from participants and ask for their reactions and opinions.



Slide 95

Display Speed Up Your Team: Continuously Improving Team Processes slide.

Play Speed Up Your Team video.

After watching the video, **guide** participants to answer the concept questions as a class.

Ask What steps did the Great Ormond Street Hospital team take to improve their process?

Possible Answers:

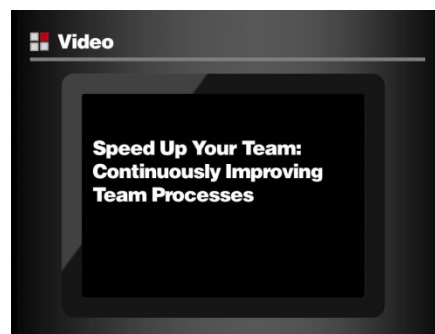
- 1) Put a process leader in place for each function;
- 2) reviewed the handoff of information to be sure not to omit anything;
- 3) assigned specific roles;
- 4) trusted each other to do their specific jobs

Ask How can your team use these steps to improve their process?

Walk the participants through a property process that requires multiple people—for example the make-ready process. Have the group identify roles for each contributor: leasing – maintenance – make-ready – maid, etc.

Read the summary to **Highlight** key points about improving team processes. The difference between winning and losing can often be measured in seconds. To be the best requires addressing every weakness of the process. A superb process requires that all team members know their roles and can be trusted to do them.

Solicit responses from participants and ask for their reactions and opinions.



Motivating Employees

Slide 96

Display Motivating Employees slide.

Say Let's shift now to the role of motivation and how you can motivate others.

Click to Show each point and **Review** information about motivating employees.

Slide 97

Display Light the Fire: Coaching Others to Ignite Their Potential slide.

Play Light the Fire video.

After watching the video, **guide** participants to answer the concept questions as a class.

1. What does a good coach or mentor do to ignite the potential of others?
2. What can you do to unleash your power and potential?

Read the summary to **highlight** key points.

Dr. Stephen R. Covey was coached at a very young age by an important figure in his life. Think about the most influential mentor you've had. What made that person influential for you? How can you mentor others in ways that will increase their sense of purpose and belief in themselves?

Solicit responses from participants and ask for their reactions and opinions.

Ask "How you can help employees in each position find their voice?"



Slide 98

Display How to Motivate Employees slide.

Explain that employees want companies that show appreciation and value their efforts. Positive behavior and achievements need acknowledgement.

Click to Show each point and **Review** how a CAM can create a supportive environment to motivate employees.

Note that different things motivate different people. A CAM needs to understand their staff and what motivates each of them.

Slide 99

Display Incentive Programs slide.

Explain that for an incentive program to work and have a lasting effect, it must focus on job performance and drive the right behavior.

Click to Show each point and **Review** keys to successful motivational programs.

How to Motivate Employees

- Emphasize achievements not mistakes
- Inspire people to use their own ideas
- Trust and respect your employees
- Focus and build on positive accomplishments
- Acknowledge performance

WELL DONE!

Incentive Programs

- Must focus on job performance and drive the right behavior.
- Must be matched to the person and the achievement
- Must be timely and specific

INCENTIVE

Reward and Recognition

Slide 100

Display Reward and Recognition slide.

Explain that money alone is not always the major factor when one evaluates total compensation. Survey after survey shows that pay is not the most important factor motivating employees.

Click to Show each point and **Review** key points about rewards and recognition

Note that the total work experience plays a major part along with compensation and benefits in what employees perceive as the total rewards available to them.

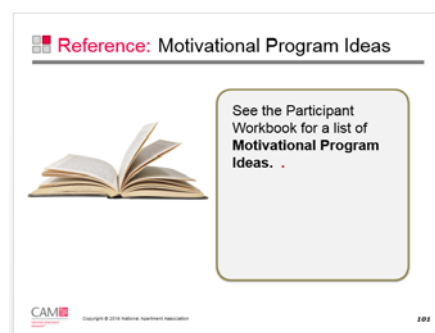
Ask participants to share successful motivational programs they have used.”

Slide 101

Display Reference: Motivational Program Ideas slide.

Refer participants to the Participant Workbook for a list of **Motivational Program Ideas**.

Review content from Participant Workbook.



Motivational Program Ideas

- Reward small accomplishments.
- Give praise immediately and tell the employee specifically what he or she did right.
- Invite the employee into your office just to say thank-you.
- Have your supervisor call and issue a word of thanks to your employee.
- Write personal thank-you notes.
- Make a “success collage” using photographs of employees working on a project and display in the employee area of the office.
- Create a “yearbook” to display in the office. Again, use pictures of your staff at work.
- Make a “goal poster” listing property goals and list star performers who excelled in achieving those goals.
- Hide short Post-it notes of praise in a desk drawer or other obscure work area location. (Be careful to not invade their privacy.) Imagine the feel-good surprise they will receive.
- Buy lunch for the staff upon achieving specific goals.
- Celebrate a personal accomplishment with a short (15 minute) staff meeting. Serve refreshments and praise for a job well done.
- Give a day off to shop during the holiday season.
- Send a thank-you e-mail.
- Remember birthdays. Celebrate with a card signed by all other staff members and perhaps a cake.
- Trade jobs. Become the groundskeeper for a day, etc.
- Invite employees to breakfast one hour before the normal arrival time. Serve breakfast, decorate the facility, play upbeat music and provide employees with million dollar bills of praise and/or outline a new contest, goals, etc.
- Distribute “funny money” to employees throughout the year for achieving a series of short-term goals. Give the money to people when you catch them doing things correctly. At the end of the designated time period purchase a variety of gifts. Hold an auction and allow the employees to buy the gifts with their money.

Performance Evaluations

Slide 102

Display Performance Evaluations slide.

Explain that the performance evaluation is the best tool an employee can have for improving performance and providing a plan for future action.

Click to Show each point and **Review** key points about performance evaluations.

Ask participants how many participate in performance evaluations for their team. **Ask** for feedback about the process

Slide 103

Display Performance Evaluation: Purpose slide.

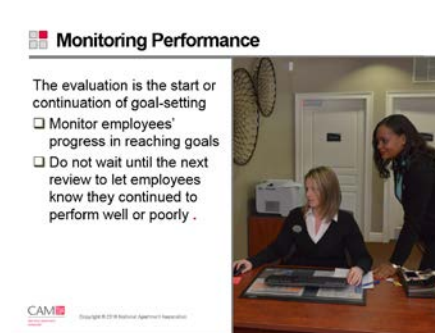
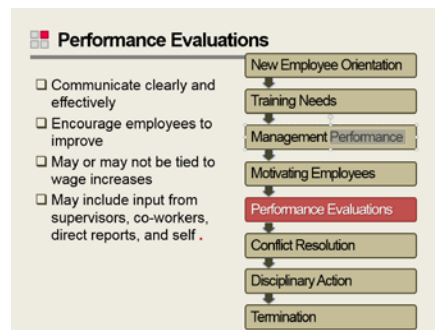
Click to Show each point and **Review** the purpose of performance evaluations.

Slide 104

Display Monitoring Performance slide.

Read the statement on the slide.

Click to Show each point and **Review** information about monitoring performance.



Slide 105

Display Writing Evaluations Tips slide.

Explain that there are two stages:

- Writing the evaluation
- Conducting the evaluation conference

Click to Show each point and **Review** tips for writing evaluations.

Emphasize that evaluations must be fair, candid, accurate, on time, and comply with company policy.

Slide 106

Display Evaluation Conference Tips slide.

Click to Show each point and **Review** tips for conducting a successful evaluation conference.

Ask participants to reveal what has been successful for them.


Slide 107

Display Potential Outcomes slide.

Click to Show each point and **Explain** that one of the following outcomes will result from the evaluation.

Writing Evaluations Tips

- Base evaluation on SMART goals
- Be clear, specific, & honest
- Explain unsatisfactory performance
- Focus on the problem, issue or behavior – not the person
- Ensure accuracy
- Document specifics
- Clearly define objectives for better performance

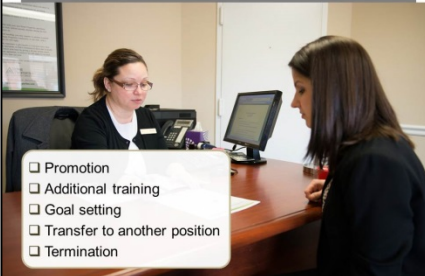


Evaluation Conference Tips



- Make the employee comfortable
- Establish the right atmosphere
- Find a private setting
- Consider the time of day
- Physically and mentally prepare

Potential Outcomes



- Promotion
- Additional training
- Goal setting
- Transfer to another position
- Termination

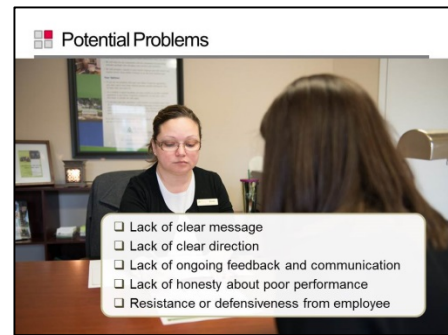
Slide 108

Display Potential Problems slide.

Click to Show each point and **Explain** that there are several communication problems that can undermine a performance evaluation.

Ask “How could you prevent or solve these potential problems?”

Emphasize that the review process should not have surprises. A CAM should not wait until the performance evaluation conference to bring up poor performance or misconduct.



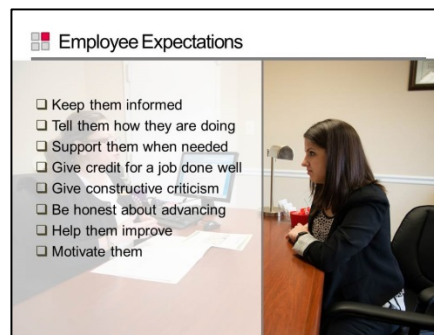
Conflict Resolution

Slide 109

Display Employee Expectations slide.

Explain that employers expect employees to accept goals and responsibilities and to correct behavior and performance problems. But employees have expectations also.

Click to Show each point and **Review** employees' expectations.



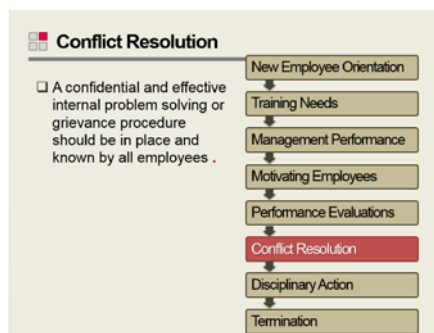
Slide 110

Display Conflict Resolution slide.

Transition “At times you may need to handle conflicts or enforce disciplinary action. This ranges from resolving a simple conflict to termination.”

Explain that conflict can be healthy if it causes employees to explore new ideas, test their beliefs, or stretch their imagination. It is unhealthy when it is avoided, handled improperly, or results in workplace animosities between employees.

Click to Show each point and **Review** approaches to conflict resolution.

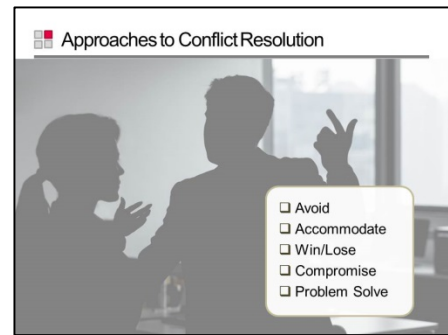


Slide 111

Display Approaches to Conflict Resolution slide.

Click to Show each bullet and **Describe** the conflict resolution approach.

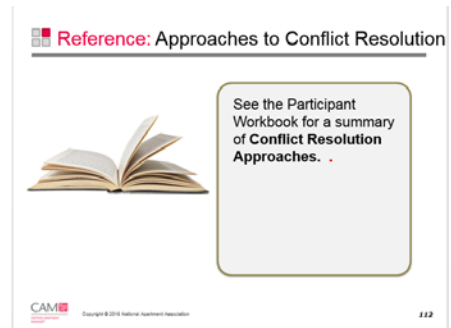
- Avoidance
 - If the conflict is minor, sometimes it is best ignored
- Accommodate
 - When a solution can be reached with an easy accommodation
- Win/lose
 - Sometimes the CAM must force the employee to comply
- Compromising
 - All parties give a little and a compromise is reached
- Problem solving
 - Open communication can result in a mutually beneficial solution

**Slide 112**

Display Reference: Approaches to Conflict Resolution slide.

Refer participants to the Participant Workbook for a summary of **Approaches to Conflict Resolution**.

Review content from Participant Workbook.



Conflict Resolution Approaches

Approach	Description
Avoidance	If the conflict is minor, sometimes it is best ignored. Interference can often cause even more conflict.
Accommodation	If a solution can be reached with an easy accommodation, give it a try. It is not always worth risking damage to relationships or causing more conflict.
Win/lose	You really are in charge and occasionally you must force the issue.
Compromising	All parties give a little and a compromise is reached. Often there is more than one way to reach a goal.
Problem Solving	Open communication can help develop a mutually beneficial solution for all parties.

Employee Complaints

Slide 113

Display Handling Employee Complaints slide.

Explain that if a CAM receives a complaint, they must protect the company's best interests.

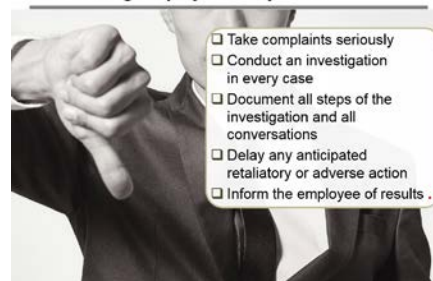
Recommend that CAMs view complaints as opportunities to improve the company and solve a problem.

Click to Show each point and **Review** how to handle an employee complaint. Remind participants that CAM's should always involve both their supervisor and their company HR group when addressing employee complaints. This is an employment area filled with liability.

Provide the following example:

An employee who files a grievance regarding health or safety issues may have a higher rate of absenteeism. Postponing discipline for the absenteeism would be a good idea in this instance. Before taking adverse action, consult an attorney familiar with employment law.

Handling Employee Complaints



Slide 114**Display Activity:** Employee Complaint slide**Objective:** Apply ideas for handling employee complaints**Duration:** 10 minutes**Instructions:**

- **Refer** participants to Employee Complaint Scenario Part One in the Participant Workbook (also included below.)
- **Walk through** a scenario where an employee complaint is received.
- **Ask** participants to consider personalities, company policy, evidence and individual interviews.
Allow time for discussion.
- **Use** the steps from the previous slide to guide the conversation.
- **Collect** feedback from the class about how to resolve it.

Debrief:

- **Reinforce** the process of how to handle employee complaints.
- **Transition** to a discussion about harassment.

Activity: Employee Complaint

Instructions:

1. Read the scenario in your Participant Workbook.
2. What would you do?
3. Write your answer in your Participant Workbook .

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Employee Complaint Scenario Part One:

One of your Leasing Consultants, Anne, complains to you that her colleague, another Leasing Consultant in the office, Debra, is taking over prospects that Anne has cultivated. Debra reschedules appointments when Anne is not available and claims the leases as her own. She refuses to share commissions, stating that “she did all the hard work and got the sale.” Debra comes in early and stays late, frequently following up on Anne’s prospects. Anne wants you to intercede. What do you do?

Harassment

Slide 115

Display **Illegal** Harassment slide.

Define Illegal Harassment:

- Behavior offensive to individuals or members of protected group
- Protected groups are those identified by the EEOC and may also include state or local protected classes. Groups include sexual orientation, race, color, national origin, disability, religion, etc.

Click to Show each point and **Review** information about harassment.

Provide examples of types of harassment:

- Verbal
 - Epithets, slurs, name calling, jokes, comments about appearance, questions about personal or sexual practices
- Physical
 - Assault, impeding or blocking movement, touching, pinching, brushing against another person, requiring persons to wear sexually revealing clothing
- Visual
 - Derogatory posters or cartoons, obscene or insulting letters or invitations, displaying derogatory or sexually suggestive pictures

Slide 116

Display **Preventing** Harassment slide.

Click to Show each point and **Review** steps a CAM can take to prevent harassment issues.

Illegal Harassment

Behavior that is offensive to individuals or groups


- Creates a hostile, intimidating, or offensive environment
- Many types of harassment
- Sexual harassment includes unwelcome advances, requests for sexual favors & conduct of a sexual nature .

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Preventing Harassment

- Create a work environment free of discrimination, intimidation, retaliation or harassment
- Enforce a harassment policy
- Adopt and communicate a complaint process
- Continually train staff to
 - Tell the harasser their conduct is unwelcome
 - Tell their supervisor or HR



Employers may be liable for harassment by:

- Their supervisors
- Company co-workers
- Outsiders

Substance Abuse

Slide 117

Display Addressing Harassment slide.

Click to Show each point and Review steps a CAM can take to handle harassment issues.

Explain that you and your company will be liable for how you address harassment.

Slide 118

Display Suspecting Substance Abuse slide.

Explain that substance abuse issues have a negative effect on productivity and morale of other employees.

Explain that an employee's aberrant behavior or sudden changes in performance may indicate a substance abuse issue.

Click to Show each point and Review how to handle a situation where the CAM faces a behavior or performance problem they believe may be the result of substance abuse.

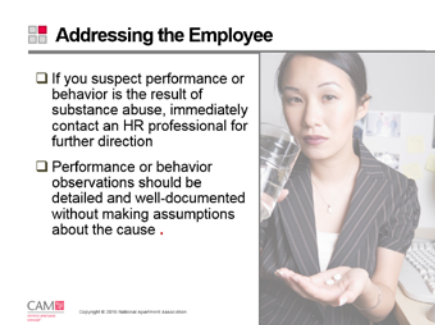
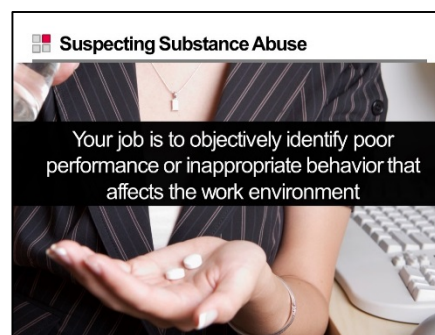
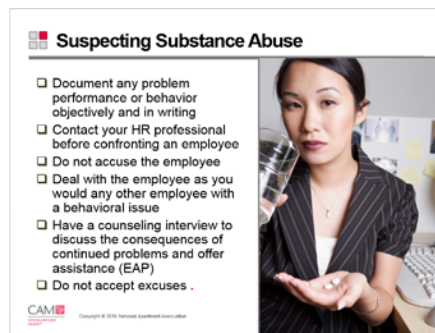
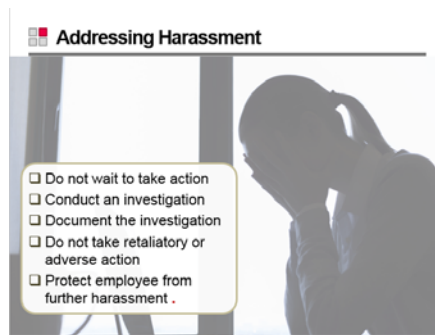
Slide 119

Display and Read Suspecting Substance Abuse slide.

Slide 120

Display Addressing the Employee slide.

Click to Show each point and Review guidelines when a CAM suspects substance abuse.



Workplace Violence

Slide 121

Display Addressing the Employee slide.

Click to Show each point and **Review** how a CAM should confront an employee when they think there is a substance abuse problem.

Addressing the Employee

- Ensure witnesses are present
- If policy calls for a drug test, send the employee for the test
- If the employee refuses the test, explain they may be terminated & send them home
- Arrange transportation home
- Document the incident .



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Slide 122

Display Preventing Workplace Violence slide.

Explain that violence can occur as a result of:

- A disgruntled employee, resident or resident's guest
- A domestic violence situation with an employee, spouse or other relative, or a resident
- A vendor or contractor
- A stranger unknown to staff

Click to Show each point and **Review** steps a CAM can take to prevent workplace violence.

Preventing Workplace Violence

- Create a healthy and welcoming environment
- Do not tolerate gossip, bullying or harassment
- Use sound hiring practices
- Conduct terminations privately and respectfully
- Implement a violence prevention program
- Train staff to identify and respond to potential signs or threats .



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Slide 123

Display Handling Workplace Violence slide.

Click to Show each point and **Review** how a CAM should handle workplace violence.

Handling Workplace Violence

- Warn others, leave the area immediately and call the police
- Do not try to reason with them
- Avoid actions that might trigger a violent response
- Take complaints seriously; intervene quickly & effectively
- Don't assume you have to handle difficult situations on your own



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Slide 124

Display Weapons Laws slide.

Click to Show each point and **Review** information about weapon laws.

Weapon Laws

- Many states have "open carry" or "concealed carry" laws that permit licensed gun owners to carry a firearm
- Ask your HR department how to address a situation where an employee wishes to carry a firearm while on the job or after hours when on call .



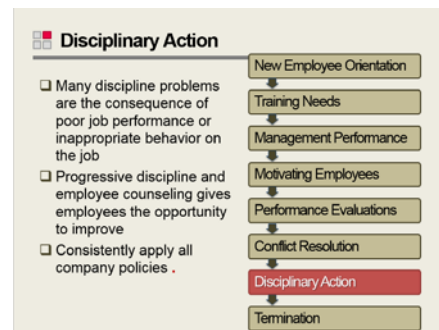
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Disciplinary Action

Slide 125

Display Disciplinary Action slide.

Click to Show each point and **Review** key points about disciplinary action.



Slide 126

Display Progressive Discipline slide.

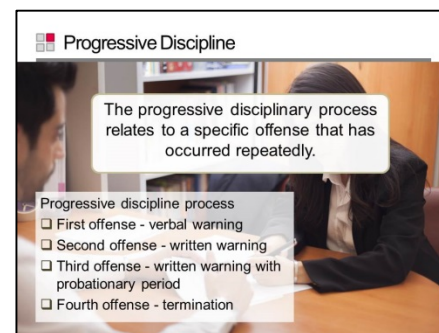
Explain that progressive discipline provides an objective structure that helps employees to see their offending issues and provides an opportunity to improve their performance.

Click to Show each point and **List** the progressive discipline process. Add that some conduct and behavior issues are so severe that the progressive process may be abbreviated and steps eliminated. For example, an employee who pushes and shoves another employee may get written up rather than a verbal warning.

Click and Emphasize that the disciplinary process relates to a specific offense that has occurred repeatedly. If an offense of a different nature occurs, it may start the disciplinary cycle over.

Note that not all companies handle progressive discipline the same way.

Transition “During each of these steps the CAM should schedule and conduct an employee counseling session.”



Slide 127

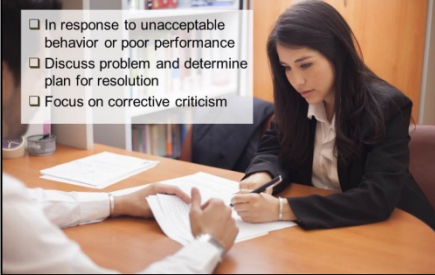
Display Employee Counseling slide.

Click to Show each point and **Review** information about employee counseling.

Most companies have forms and required protocol to complete a counseling session with an employee. It is important to meet all paperwork requirements and get approval for the counseling session before it occurs.

Employee Counseling

- In response to unacceptable behavior or poor performance
- Discuss problem and determine plan for resolution
- Focus on corrective criticism

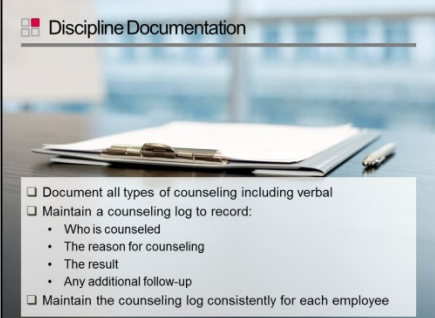

Slide 128

Display Discipline Documentation slide.

Click to Show each point and **Review** the documents a CAM needs to maintain for disciplinary action.

Discipline Documentation

- Document all types of counseling including verbal
- Maintain a counseling log to record:
 - Who is counseled
 - The reason for counseling
 - The result
 - Any additional follow-up
- Maintain the counseling log consistently for each employee


Slide 129

Display Handling Discipline Tips slide.

Click to Show each point and **Review** tips on how to handle discipline.

Handling Discipline Tips

- Be consistent and fair
- Discuss the situation with your supervisor or HR
- Match the consequence to the offense



Termination

Slide 130

Display Suspension slide.

Read the key points on the slide. Many companies do not use the suspension process unless there is a specific situation in the office or on the site that requires time to investigate and requires the removal of the employee in order to complete that research.

Click to Show each point and **Review** information about suspensions. Be sure to be quick and identify an exact time period for the suspension.

Slide 131

Display Termination slide.

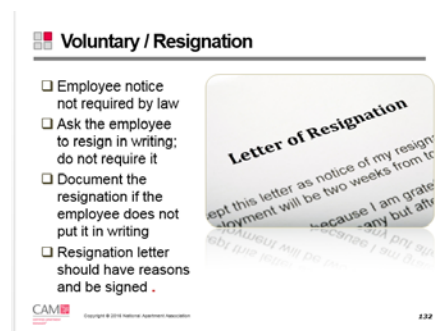
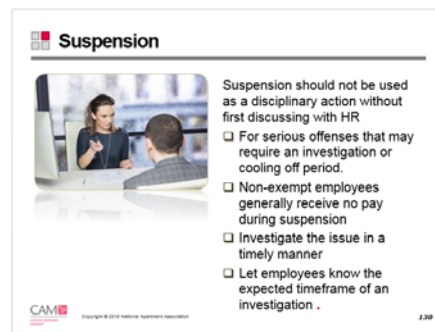
Click to Show each point and **List** the types of job separation discussed in this section. Identify the two primary differences

Slide 132

Display Voluntary / Resignation slide.

Click to Show each point and **Review** information about resignations.

Remind participants of Employment-at-will. This is the situation where both the employee and employer remain in an employment relationship because they chose to. Either can leave that relationship at any time.



Slide 133

Display Involuntary / Termination slide.

Click to Show each point and **Review** information about terminations.

Slide 134

Display Successful Termination Tips slide.

Click to Show each point and **Read** tips for planning a termination.

Remind participants that there is a lengthy list of tips found in the CAM Reference Guide.

Ask the participants to share their experiences and challenges with terminations

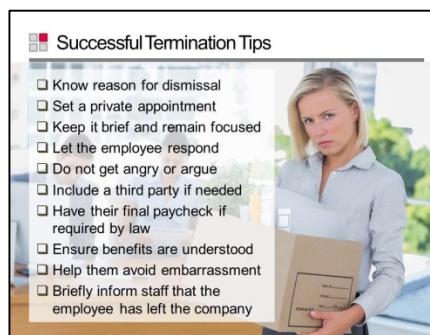
Slide 135

Display State Specific Employment Termination slide.

Click to Show each point and **Explain** that some termination aspects are regulated by state and local law.

Advise participants to contact their local HR department to verify state laws about:

- Final payment of wages
- Unemployment compensation. Any notices of a claim for unemployment benefits must be handled promptly!
- Responding to reference requests. Follow the company protocol regarding references. Most are handled by the payroll officer rather than the CAM.



Slide 136

Display and Read Exit Interviews slide.

Explain:

- Most often exit interviews are completed for voluntary terminations only
- Exit interviews may be completed face to face, via email or via letter
- Most exit interviews are conducted by someone other than the direct supervisor.

Explain that there is a sample exit interview form and a longer description of how these are handled in the CAM Reference Guide.



Wrap Up

Key Points

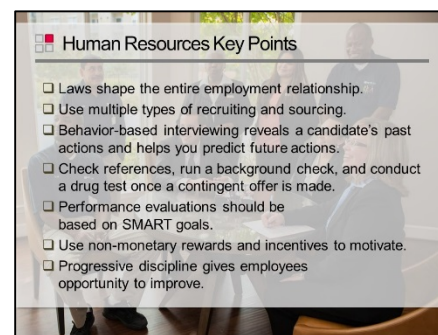
Slide 137

Display the section title slide and **transition** into the wrap up.



Slide 138

Click to Show and Review Key Points.



Slide 139

Thank participants.



Knowledge Check Answers

Knowledge Check: Employment Laws

1. What parts of the employment process are covered by employment laws?

- Recruiting
- Hiring
- Terms and conditions of employment
- Termination
- Post-employment relationships .

Knowledge Check: Employment Laws

2. What are the federal protected classes designated in employment laws?

- Race
- Color
- Religion
- Sex (including harassment)
- Women (regarding equal pay)
- Individuals age 40+
- Genetic Information
- Disability
- National Origin
- Pregnancy .

Knowledge Check: Employment Laws

3. What are the federal posting requirements?

- Notices must be conspicuously located in work locations
- Postings must not be altered, defaced or covered by other material

4. What postings are required by federal laws?

- Fair Labor Standards Act
- Title VII of the Civil Rights Act and ADEA
- Employee Polygraph Protection Act
- OSHA
- Americans with Disabilities Act
- Family Medical leave Act
- Equal Pay Act
- USERRA .

✓

Knowledge Check: Payroll, Benefits, and Overtime

5. What components make up an employee's total cash compensation?

- Salary
- Benefits
- Free apartments or rent discounts
- Incentive Pay
- Recognition
- Reward Programs

6. Describe how base salaries are determined.

- Median salary
- Ranges that take into account experience, property size, and performance
- Surveys

7. What costs represent the largest share of the cost of employer-sponsored benefits packages?

- Medical benefits .

✓

Knowledge Check: Payroll, Benefits, and Overtime

8. What is incentive or variable pay?

Pay that varies with individual performance and sometimes with team performance

9. List the ways personnel could earn incentive pay.

- Leasing commissions
- Lease renewals
- Individual and team performance
- Resident satisfaction/retention
- Financial benchmarks
- Occupancy benchmarks

10. How should you store employee records to maintain confidentiality?

Based on directions from the HR Department – always in a locked filing cabinet .

✓

Knowledge Check: Employment Process

11. What are some online recruiting resources?

- Your property's website
- RPMcareers.org
- NAAEI career website
- General job posting websites

12. What is the most effective strategy when sourcing on social media?

Use multiple networks collaboratively

13. What four steps can you take to refine your pool of candidates?

- Review the Interview Evaluation form
- Verify references
- Conduct a second interview
- Use pre-employment screening agencies

Knowledge Check: Employment Process

14. Why would you want to use behavior-based interviewing?
To learn about past job responsibilities, experience, and reactions to situations

15. What is a conditional employment offer contingent upon?

- Satisfactory references
- Results of tests and background checks

16. What is Employment-At-Will?
Allows employer or employee to terminate the relationship anytime .

Knowledge Check: Employee Needs Throughout Employment

17. What are the consequences for poorly trained, uninformed personnel?
It can cost the owner, you, and employees time and money

18. What are SMART goals?

- Specific
- Measurable
- Attainable
- Relevant
- Timely

19. Define delegation.
Passing your authority to an employee and holding them accountable for the task

Knowledge Check: Employee Needs Throughout Employment


20. How can you motivate employees?

- Emphasize achievements
- Inspire people to use their own ideas
- Trust and respect employees
- Focus and build on accomplishments
- Acknowledge performance

21. What are the purposes of a performance evaluation?

- Review prior performance
- Review job standards
- Review supervisor expectations
- Get feedback from the employee
- Set goals for future performance

22. On what should you base a performance evaluation?
SMART goals .



Knowledge Check: Employee Needs Throughout Employment

23. What are the five approaches to resolving conflict?


- Avoidance
- Accommodate
- Win/Lose
- Compromising
- Problem Solving

24. What is harassment?

Behavior that is offensive to individuals or groups

25. In a situation of workplace violence, what should you do?

Warn others, leave the area immediately, and call the police



Knowledge Check: Employee Needs Throughout Employment

26. When disciplining staff, how can you give employees the opportunity to improve?

Use the progressive discipline process

27. What types of counseling should you document?

All types including verbal

28. Regarding termination, what state-specific information should you verify with your local HR office?

- Exit interviews
- Final payment of wages
- Unemployment compensation
- Responding to reference requests .