Resident Experience
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ACKNOWLEDGMENTS

For over 40 years, the National Apartment Association and NAA Education Institute have offered the Certified Apartment Manager (CAM) credential to enhance the knowledge and skills of apartment management professionals. NAAEI recently rewrote the CAM program after conducting a job task analysis and validating the knowledge and skills required for community management competency. Alexandra Jackiw, CAPS, CPM, past NAA Chairman and past NAAEI President, served as the lead CAM subject matter expert. She also pilot tested CAM at the Triangle Apartment Association in Raleigh, NC and the Apartment Association of Greater Orlando. Alex worked tirelessly to take CAM to the next level. Of particular note is the case study she developed that is woven throughout the CAM program. The NAAEI Board of Directors and NAAEI staff recognize and thank Alex for the hundreds of volunteer hours she spent developing the 2016 edition of CAM.

Stephanie Puryear-Helling
NAAEI President

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NAAEI Executive Vice President

SUBJECT MATTER EXPERTS

The NAA Education Institute wishes to thank the following apartment industry professionals for contributing their time and expertise to the rewrite of the Certified Apartment Manager course:

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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 2 hour, 30 minute module (excluding breaks and lunch).

**Materials Needed**
- PowerPoint slides
- Creekwood Case Study
- Resident Experience Participant Workbook

**Equipment Needed**
- 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.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Activity</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>• n/a</td>
<td>5 mins</td>
</tr>
<tr>
<td>Building Relationships</td>
<td>• Participants learn the value of relationships</td>
<td>20 mins</td>
</tr>
<tr>
<td></td>
<td>• Participants learn about the multicultural society and multi-generational customers.</td>
<td></td>
</tr>
<tr>
<td>Application &amp; Screening</td>
<td>• Participants will learn about applications, fees and deposits.</td>
<td>25 mins</td>
</tr>
<tr>
<td></td>
<td>• A detailed look at the screening process is taught</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Participants will decide if they should accept a sample resident.</td>
<td></td>
</tr>
<tr>
<td>New Resident Education</td>
<td>• The lease is discussed and effective move-in experiences are explored.</td>
<td>20 mins</td>
</tr>
<tr>
<td></td>
<td>• Participants will read and review a sample New Resident Information packet.</td>
<td></td>
</tr>
<tr>
<td>Ongoing Resident Communication</td>
<td>• Participants will discuss service requests, emergency maintenance and the role of newsletters</td>
<td>20 mins</td>
</tr>
<tr>
<td></td>
<td>• Customizing resident activities are discussed and presented</td>
<td></td>
</tr>
<tr>
<td>Resident Retention &amp; Renewal</td>
<td>• Participants will learn the importance of service and satisfaction in retaining residents</td>
<td>25 mins</td>
</tr>
<tr>
<td></td>
<td>• Participants will examine the renewal process.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Participants will complete a financial calculation about the impact of the renewal.</td>
<td></td>
</tr>
<tr>
<td>Move Out Procedures</td>
<td>• Handling of move-outs is taught.</td>
<td>20 mins</td>
</tr>
<tr>
<td></td>
<td>• Handling of security deposits is reviewed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Participants learn the basic steps to an eviction</td>
<td></td>
</tr>
<tr>
<td>Community Files &amp; Records</td>
<td>• Participants learn about a sampling of typical community forms and records</td>
<td>10 mins</td>
</tr>
<tr>
<td></td>
<td>• Software and technology are explored as they add to the retention of data and records.</td>
<td></td>
</tr>
<tr>
<td>Wrap Up</td>
<td>• n/a</td>
<td>5 mins</td>
</tr>
</tbody>
</table>

**Approximate time** 150 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

Agenda Slide 3
Display slide.

Review the Agenda.
Building Relationships

**Building Relationships with Residents**

*Slide 4*
Display the section title slide and introduce the topic.

**Relationships are directly related to occupancy rates**

*Slide 5*
Display slide.

**Explain** that ongoing relationships with the residents need the same attention and level of effort as they do during the initial leasing process.

**Click and Read** purpose of building relationships:
- Relationships are directly related to occupancy rates.

**Click and Explain** that building relationships with the residents ensures your community is full as possible.

**Click and Read** the key point on the slide.

**Note that** when a resident decides to move out of the community, the costs are high. In fact, reducing turnover may have a greater financial impact than new rentals. Turnover costs are $2,000 to $3,000 per move out.
Building Relationships

Display Building Relationships slide.

Explain that creating rapport is the key to relationship building.

Click and Explain how to express a genuine interest:
- Find out what is important to them
- Ask questions
- Use their first name

Click and Explain how to be genuinely friendly:
- Smile
- Have a pleasant disposition
- Use a warm handshake
- Display good manners
- Maintain strong eye contact
- Use the tone of your voice

Click and Explain how to create physical rapport.
- Try to match body language, vocabulary and tone

Click and Explain how to be an active listener.
- Encourage the speaker
- Paraphrase to show and ensure understanding

Click and Explain how to seek agreement.
- Search for a way to reach similarities
- Look for beliefs and opinions you can share
Multicultural Marketplace

**Slide 7**
Display Multicultural Marketplace slide.

**Explain** that even if language is not a barrier, a CAM and their staff need to show respect to other cultures and be sensitive to their needs.

**Click to show** each point and **Review** ways a CAM can communicate effectively in a multicultural marketplace.

**Slide 8**
Display Reference: Multicultural Marketplace slide.

**Refer** participants to the Participant Workbook for more information about the Multicultural and Multigenerational Marketplace.

**Review** content from Participant Workbook.

### Multicultural and Multigenerational Marketplace

<table>
<thead>
<tr>
<th>Multicultural</th>
<th>Multigenerational</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Acknowledge the additional anxiety for those who have not yet mastered English.</td>
<td><strong>Veterans &amp; Boomers:</strong></td>
</tr>
<tr>
<td>• Communicate dearly and explain slowly</td>
<td>• Show that you’re interested in me.</td>
</tr>
<tr>
<td>• Do not stereotype or lump groups together</td>
<td>• Ask me questions.</td>
</tr>
<tr>
<td>• Choose your vocabulary carefully</td>
<td>• Let’s get to know one another and then we’ll enjoy doing business together.</td>
</tr>
<tr>
<td>• Avoid negative phrasing</td>
<td>• <strong>Value = Relationship</strong></td>
</tr>
<tr>
<td>• Watch for signs that you have not been understood</td>
<td><strong>Gen X &amp; Millennials:</strong></td>
</tr>
<tr>
<td>• Slow down</td>
<td>• Prove that you’re good.</td>
</tr>
<tr>
<td></td>
<td>• Prove that you know what you’re doing.</td>
</tr>
<tr>
<td></td>
<td>• I want a quick, thorough and efficient transaction.</td>
</tr>
<tr>
<td></td>
<td>• After you’ve proven this to me, we might get to know one another.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Value = Time</strong></td>
</tr>
</tbody>
</table>
**Generations in the Marketplace**

*Display Generations in the Marketplace slide.*

List each of the generations.
Take the time to learn about generational differences and how it affects the way people respond to your marketing and leasing approach.

**Multi-generational Marketplace**

*Display Multigenerational Marketplace slide.*

Explain that people like to do business with someone that can relate to them.

**Generational Interactions**

*Display Generational Interactions slide.*

Explain what is important to each generation when considering an apartment home.
Application and Screening Process

Application and Screening Process

**Application and Screening Process**

**Slide 12**

Display the section title slide and introduce the topic.

---

**Rental Application**

**Slide 13**

Display Rental Application slide.

*Explain* that applicants should be instructed to take time to complete the application accurately and to be sure that all sections are filled out.

*Click to show* each point and *Review* information about a CAM’s role and responsibilities regarding completion of a rental application.

---

**Fees and Deposits**

**Slide 14**

Display Fees and Deposits slide.

*Explain* that a CAM should collect fees and deposits when an applicant submits a completed application.

*Click to show* each point and *Review* information about collecting and depositing fees and security deposits.

**Slide 15**

Display Reference: Fees and Deposits slide.

*Refer* participants to the Participant Workbook for a summary of Fees and Deposits.

*Review* content from Participant Workbook.
**Fees and Deposits**

Ordinances have been enacted by local and state governments that regulate the amount that can be charged for the deposit, what it is used for, or both.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Refund required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application fee</td>
<td>• Covers the cost of generating a credit report and a criminal background check</td>
<td>No</td>
</tr>
</tbody>
</table>
| Holding deposit/ Application deposit/ Administrative fee | • Can be collected by to ensure the applicant is serious about leasing the residence  
• May be in addition to or instead of a security deposit  
**Note:** Do not collect a deposit from more than one applicant for the same residence. When multiple applicants want the same residence, you may accept other applications. | Refer to company policy. |
| Security deposit                   | • Ensures the resident will be responsible for costs associated with cleaning, damage and unpaid rent upon vacating the property | Yes, if the costs do not exceed the total of the deposit |
| Pet deposit                        | • Ensures the pet owner will be responsible for any damage the pet may cause  
• A monthly fee may be charged for the pet in addition to the deposit | Refer to company policy |
**Screening Regulations**

**Slide 16**
Display Screening Guidelines and Regulations slide.

Click to show each point and Review general screening guidelines and regulations.

---

**Fair Credit Reporting Act**

**Slide 17**
Display Fair Credit Reporting Act (FCRA) slide.

Read the definition of FCRA.

Click to show each point and Review FCRA compliance measures. Remind participants that FCRA is also discussed in the Legal Responsibilities module.

---

**Fair and Accurate Credit Transaction Act**

**Slide 18**
Display Fair and Accurate Credit Transaction Act (FACTA) slide.

Read the definition of FACTA.

Click to show each point and Review FACTA compliance measures. Remind participants that FACTA is also discussed in the Legal Responsibilities module.

---

**Slide 19**
Display Reference: The Screening Process slide.

Refer participants to the Participant Workbook for a summary of Laws Governing the Screening Process.

Review content from Participant Workbook.
## Laws Governing the Screening Process

You must investigate, understand, and uphold all federal and state laws. Consistently applying leasing policies and practices minimizes the risk of discrimination.

<table>
<thead>
<tr>
<th>Law</th>
<th>Description</th>
<th>Compliance</th>
</tr>
</thead>
</table>
| Fair Credit Reporting Act (FCRA)         | A law that identifies regulations for checking a prospective resident’s credit history | • Inform applicant of consumer report request  
• Obtain authorization signature  
• Adverse Action letter  
• Maintain records |
| Fair and Accurate Credit Transaction Act (FACTA) | Broadens the FCRA by extending allowable types of consumer reports and providing descriptions of adverse actions | • Respond correctly to fraud alerts and file blocks  
• provide proof and support when supplying collection accounts to credit bureaus |
The Screening Process

Display Screening Process slide.

Click to show each step and Walk through the screening process.

Screen Application

Display Screen Application: Criteria slide.

List things checked during the screening process.

Explain that a Social Security Number (SSN) or Individual Tax Identification Number (ITIN) is used to run credit checks. If an applicant does not have these, the CAM must ask for proof of citizenship or a valid visa and process their applications in compliance with the Fair Housing Act.

A more extensive discussion of criteria can be found in the online CAM Reference Guide.
Screen Application: Credit Report

**Slide 22**

Display Screen Application: Credit Report slide.

Explain that credit reports may be evaluated on one or more of these four criteria.

Click to show each point and Review the criteria of each.

Note that rental history information and court records such as eviction notices may also be included in the credit report.

Note: If your community is using applicant screening software, the report you receive may only provide a final determination: Approved, Approved with Condition, Denied.

**Slide 23**

Display Reference: Credit Report Criteria slide.

Refer participants to the Participant Workbook for a summary of Credit Report Criteria.

Review content from Participant Workbook.
### Credit Report Criteria

<table>
<thead>
<tr>
<th>Credit Report Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acceptable Accounts Ratio</td>
<td>Based on information from the applicant’s credit report calculated as: Positive trade lines divided by Positive trade lines + Negative trade lines. When scoring this part of the background check, no trade lines (meaning no credit history) may display on the report and it will be interpreted as approved with conditions. A report of No Record is interpreted as bad credit history and the application will be denied.</td>
</tr>
<tr>
<td>Debt to Income Ratio</td>
<td>Based on information from the applicant’s credit report and information entered into the screening program, this is determined as Debt divided by income.</td>
</tr>
<tr>
<td>Rent to Income Ratio</td>
<td>Based on information entered into the screening program this is calculated as rent divided by income.</td>
</tr>
<tr>
<td>FICO Score</td>
<td>A numerical score calculated by the credit bureau. FICO scores provide the best guide to future risk based solely on credit report data. The higher the score, the lower the risk. The score reflects a mathematical calculation which evaluates a person’s payment history, amounts owed, length of credit history, new credit and types of credit used. The range of possible scores is 300 to 850.</td>
</tr>
</tbody>
</table>
**Income Verification**

**Slide 24**
Display and Read Screen Application: Income Verification slide.

Explain that company policy will establish the source documents accepted for verification.

List items used for income verification.

Explain that combined household income must satisfy the community’s scoring criteria.

**Screen Application: Criminal History**

**Slide 25**
Display Screen Application: Criminal History slide.

Click to show each point and Review information about checking an applicant’s criminal history.

Note that records must often be checked in multiple states or jurisdictions going back at least seven years.

Note that the Supreme Court recently upheld that denying occupancy based on criminal history may be unlawful because of disparate impact. Check with your supervisor before making decisions about applicants with a criminal history.

**Investigate Information – Legal Residence**

**Slide 26**
Display Investigate Information: Legal Residence slide.

List the types of proof a CAM can accept to verify legal residence.

Click and Note that improper or invalid identification can be a reason to reject an application.
Review Application

Display Review Application slide.

Click and List the things a CAM must check on an application to ensure compliance with community guidelines.

Approve or Deny Application

Display Review Application: Approve or Deny slide.

Click to show each point and Review the notifications required for each situation.

Note that this may be done by your community screening software. If an application is Denied, you should never override the decision without consulting with your supervisor.

Note that some applications may be “Approved with Conditions.”

Display Reference: Approval and Denial Communications slide.

Refer participants to the Participant Workbook for a summary of Approval and Denial Communications.

Review content from Participant Workbook.
### Approval and Denial Communications

<table>
<thead>
<tr>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>• Call the person to explain the status of their application.</td>
</tr>
<tr>
<td></td>
<td>• Send an approval letter.</td>
</tr>
<tr>
<td>Approved with Conditions</td>
<td>• Call the person to explain the status of their application.</td>
</tr>
<tr>
<td></td>
<td>• Immediately send an adverse action letter that includes:</td>
</tr>
<tr>
<td></td>
<td>o The contact information for the credit reporting agency that provided the information</td>
</tr>
<tr>
<td></td>
<td>o A statement that the agency that provided the report did not make the decision to take the adverse action</td>
</tr>
<tr>
<td></td>
<td>o A notice of the right to dispute the accuracy of the information furnished to the agency</td>
</tr>
<tr>
<td></td>
<td>• If the adverse action is based on a credit score, the letter must include:</td>
</tr>
<tr>
<td></td>
<td>o The numerical credit score</td>
</tr>
<tr>
<td></td>
<td>o Range of possible scores</td>
</tr>
<tr>
<td></td>
<td>o The key factors that adversely affected the score</td>
</tr>
<tr>
<td></td>
<td>o The date on which the credit score was created</td>
</tr>
<tr>
<td></td>
<td>o The name of the person or entity that provided the score</td>
</tr>
<tr>
<td></td>
<td>• Provide a specific deadline for making the decision, after which the application will be denied.</td>
</tr>
<tr>
<td>Denied</td>
<td>• Call the person to explain the status of their application.</td>
</tr>
<tr>
<td></td>
<td>• Immediately send an adverse action letter that includes:</td>
</tr>
<tr>
<td></td>
<td>o The contact information for the credit reporting agency that provided information</td>
</tr>
<tr>
<td></td>
<td>o A statement that the agency that provided the report did not make the decision to take the adverse action</td>
</tr>
<tr>
<td></td>
<td>o A notice of the right to dispute the accuracy of the information furnished to the agency</td>
</tr>
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<td></td>
<td>• If the adverse action is based on a credit score, the letter must include:</td>
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<tr>
<td></td>
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</tr>
<tr>
<td></td>
<td>o Range of possible scores</td>
</tr>
<tr>
<td></td>
<td>o The key factors that adversely affected the score</td>
</tr>
<tr>
<td></td>
<td>o The date on which the credit score was created</td>
</tr>
<tr>
<td></td>
<td>o The name of the person or entity that provided the score</td>
</tr>
<tr>
<td></td>
<td>• Avoid the word “rejected.” Instead, use “denied,” “not accepted” or “declined.”</td>
</tr>
<tr>
<td></td>
<td>• Do not disclose specific information from the applicant’s credit report.</td>
</tr>
<tr>
<td></td>
<td>• The applicant must contact the credit reporting agency to get this information.</td>
</tr>
</tbody>
</table>
Slide 30
Display slide.

Read key point. Ask how many participants have a shorter turnaround.

Click and Read second key point.

Notify Prospect Slide 31
Display Notify Prospect slide.

Click to show each point and Review general guidelines about notifying applicants.

Slide 32
Display Reference: Creekwood Community Criteria slide.

Refer participants to the Participant Workbook for the Creekwood Community Criteria.

Review content from Participant Workbook in preparation for the next activity.
Creekwood Community Criteria

Income criteria:
- The applicant must gross 80% of the monthly rent in one week
- All income must be verifiable via pay stubs, tax returns of accountant’s statements
- No under the table income

Credit criteria:
- Credit score of no less than 600
- Any score under 650 requires a co-signer
- All students require a co-signer
- Co-signers must have a score of 700 or above plus a minimum of 125% income ratio

Other criteria:
- Deny any applicant that has a negative rental or mortgage history
- Deny any applicant that answers yes to the question regarding conviction of a felony
Slide 33: Display Activity: Applicant Screening at Creekwood slide

Objective: Encourage participants to analyze applications against community guidelines

Duration: 5 minutes

Instructions:
- **Direct** participants to the Community Criteria in their Participant Workbook.
- **Explain** that they will use this as a basis to identify whether they will approve candidates in three scenarios.
- **Click to show** each slide to display the three scenarios.
- **Tell** participants that for each scenario, they will determine if the applicant should be approved, approved with conditions, or denied.
Display Activity: Scenario 1 slide

Read the scenario details:
- Your property has a one-bedroom unit for lease at $600 a month
- John Jones is a full time student with a part-time job
- He grosses $485 a week and shows pay stubs as proof
- His credit score is 700

Conduct a survey by raise of hands if the applicant should be approved, approved with conditions, or denied.

Ask volunteers to share why they answered as they did.

Debrief:
- Should be approved with the condition of a co-signer. Although John Jones income and credit score meet criteria, all students require a co-signer and you should not make exceptions.
Display Activity: Scenario 2 slide

Read the scenario details:
- Your property has a two-bedroom unit for lease at $730 a month
- Cecelia Smith is a single mom with a 10-year-old son
- She grosses $550 a week and shows pay stubs as proof
- Her credit score is 800

Conduct a survey by raise of hands if the applicant should be approved, approved with conditions, or denied.

Ask volunteers to share why they answered as they did.

Debrief:
- Should be denied. Cecelia does not meet the income criteria for the unit she is interested in renting.
Display Activity: Scenario 3 slide

Read the scenario details:
- Your property has a two-bedroom unit for lease at $730 a month
- Susan and Ted Manning are parents of twin two year old daughters
- They have a combined gross weekly income of $900
- Their credit score is 700

Conduct a survey by raise of hands if the applicant should be approved, approved with conditions, or denied.

Ask volunteers to share why they answered as they did.

Debrief:
- Should be approved. The Mannings meet the income and credit criteria for the unit they are interested in renting.
New Resident Education

Slide 37
Display the section title slide and introduce the topic.

Remind participants that this is just like orienting a new team member.

The Lease
Slide 38
Display The Lease slide.

Explain that the next step is to sign the lease and collect fees and deposits.

Define lease:
- A legally enforceable contract that grants a resident the rights and responsibilities of possession and use of an apartment for a specified period of time

Emphasize that the lease is one of the first documented forms of communication with a new resident and holds all parties accountable for agreements made.

Click and List resources where a CAM can obtain lease templates.

Click and List how a leasing professional will use the lease templates.
**Lease Inclusions**

**Slide 39**
Display Lease Terms slide.

Click to show each point and Review the basic elements of a lease agreement.

Click to show each point and Review possible additional clauses of a lease agreement.

Note that these are sample lists and are not all inclusive.

If participants are unfamiliar with a joint and several clause, Explain that it helps manage occupancy changes that occur after move-in.

For a residential lease, joint and several liability means that each tenant is jointly AND separately responsible for the entire rent amount and for any damages.

NOTE: This may vary for student housing properties.

Advise participants to check their policies to learn specifics about adding or removing occupants.

**Slide 40**
Display Lease Responsibilities slide.

Click to show each point and Review resident responsibilities regarding lease paperwork.

Click to show each point and Review CAM responsibilities regarding lease paperwork.

Click and Emphasize that each party must have an original signed copy of the lease.
Community Policies

Slide 41
Display Community Policies slide.

Explain that:

- Community policies should be provided to a resident before signing the lease.
- They may be incorporated within the lease agreement or part of an addendum of community policies attached to and incorporated by reference.

List topics that should be included.

The Lease File

Slide 42
Display Lease File slide.

Explain that a CAM should create a lease file for each new apartment being leased. Use of a standardized file content policy is recommended.

Click to see and Review the recommended folder contents. Ask what type of standardization the participants use.

Move-In Walk-Through

Slide 43
Display Preparing for Move-In slide.

Transition “The first step of moving in is being prepared for the new resident.”

Note that a move-in checklist and move-in inspection form can help ensure necessary details have been addressed.

List what a CAM should prepare prior to move-in.
**Slide 44**

Display Conducting a Move-In Walk-Through slide.

**Explain** that a staff member should conduct a walk-through and orientation with the new resident and present the following:

- Benefits list
- Move-in questionnaire
- Welcome card
- Suggestion card
- Resident survey
- Property handbook of rules and safety procedures
- Move-in gift

**After Walk-Through**

**Slide 45**

Display Post Orientation Activities slide.

**List** what a CAM should provide after the orientation walk-through.

**Emphasize** that resident retention begins the day the resident moves into the community. Therefore, it is important to provide a problem-free move in day by preparing in advance.

Data has shown that new residents generally decide within the first thirty days whether they will renew their lease!
New Resident Orientation

**Slide 46**
Display New Resident Orientation slide.

**Explain** that the orientation should occur shortly before or immediately after a resident moves in and should be conducted by the team member who rented the apartment (if available).

**Click to show** each point and **List** information that should be included in the orientation. **Ask** how many participants are now scheduling a new resident orientation and inspection meeting BEFORE move-in day?
Display Activity: New Resident Orientation for Creekwood slide

Objective: Familiarize participants with what a new resident information packet looks like and what is included. Be sure to include a discussion that the packet should be customized to the new resident’s interests and needs.

Duration: 10 minutes

Instructions:
- **Divide** participants into groups of four to five people.
- **Instruct** participants to use the Case Study Marketing Plan to create a list of at least 10 items that would go in a new resident orientation packet at Creekwood.
- **Ensure** that most of the items are unique to Creekwood.

Debrief:
- **Ask** groups to share the contents of their packets.

Answers may include:
- Copies of all signed documents
- A current community newsletter
- Special coupons from local businesses
- An area map
- Public transportation schedules or routes
- Nearby school information (if applicable)
- Emergency phone numbers
- Guidelines for proper operation of apartment features
- Guidelines for proper operation of appliances
- A resident handbook or community guide
- A list of valuable links to area services
- A blank move-in inventory form
Suggest the following from the Case Study:

- Discounts or coupons to Bed, Bath & Beyond, Best Buy, Hobby Lobby,
- Offer a Target Gift Card
- Eagle Creek Reservoir passes
- Eagle Creek Park boat rentals and zip line coupons
- Senior Center information and volunteer opportunities
Resident Communication

**Maintenance Follow-up Orientation**

**Slide 48**
Display the section title slide and introduce the topic.

**Slide 49**
Display Maintenance Follow-up Orientation slide.

Transition “A maintenance orientation is a great way to introduce the residents to the maintenance details.”

Click and List the items the Maintenance Supervisor may discuss during a maintenance orientation.

Note that these are examples and are not all inclusive.

Explain that an easy way to reduce maintenance workloads and help residents is to provide “do-it-yourself” solutions for simple maintenance needs. CAMs should include this information in move-in folders and on the community web portal.

Ensure the office staff provides:
- Instructions to give residents when they call in service requests
- Information on how to give the “do-it-yourself” concept a positive spin
**Service Requests**

Display Service Requests slide.

**Explain** that residents will communicate with staff about maintenance service requests.

**Click to show** each point and **List** ways to ensure positive communication and workflow of requests.

**Click and Read** key point on slide.

**Emergency Service Requests**

Display Emergency Service Requests slide.

**Explain** that it is important for a resident to know how to place an emergency request from day one.

**Click to show** each point and **Review** emergency service request procedures.

**Ask** “What are some examples of emergency service requests?

**Answers may include:**

- No electricity
- No plumbing or water throughout the apartment home
- Major water infiltration
- No heat at temperatures below 55-60°F
- No air conditioning at temperatures over 86-90°F
- Smoke alarms and/or carbon dioxide detectors sounding
- Apartment access problems
**Key Policy**

**Slide 52**

Display Residents and Their Keys slide.

**Explain** that there should be **no** master key for units.

**Click and Read** bullets.

**Explain** that resident should complete a key release form giving authorization to release the key to an occupied unit. This is done for maintenance service and showings.

**Click and Review** procedures for resident lockouts. **Ask** how participants are handling lockouts.

---

**Resident Newsletter**

**Slide 53**

Display Resident Newsletter slide.

**Ask** participants how many use newsletters to communicate with their residents. If not, how do they communicate?

**Describe** a resident newsletter.

- A publication put out by the management company to provide helpful information to all residents in the community

**Click to show** each point and **List** content typically included in newsletters.

**Note** that newsletters may be delivered electronically.

**Click and Emphasize** that CAMs should address problems on a positive note.
Rent Collection

Display Communicating Rent Collection slide.

**Explain** that the timeframe when rent is due should be clearly indicated in the lease. A CAM should include a copy of the policy with resident move-in materials and post it in the office.

**Click and Provide** examples of how to make rent payment a habit:
- Post regular reminders on community bulletin boards
- Remind new residents when rent is due
- Knock on doors on weekends and evenings
- Never make deductions from the rent
- Collect ONE check per apartment

**Click and Explain** that an easy payment process encourages on-time payment.

**Click and Explain** that residents will appreciate being notified *before* fees are assessed.

**Click and Explain** that a CAM needs to remind residents that their payment is late and should not make exceptions.

**Note** that late fees should be written into the lease agreement and should comply with all state and local regulations. If your property is federally subsidized or tax credit, you will need to abide by the requirements in the HUD handbook.
Communicating about Criminal Activity

Display Communicating about Criminal Activity slide.

Review information about communicating a zero-tolerance policy.

Explain that a CAM should respond to complaints and concerns about residents quickly to manage inappropriate behavior.

Note that if management fails to react in a reasonable and timely manner, a victim may have legal recourse for recovering damages.

Click and Read information about company policies and communication of criminal activity.
Resident Programs and Activities

Slide 56
Display the section title slide and introduce the topic.

Slide 57
Display Resident Activities slide.

Explain that the purpose of resident activities is to:
- Provide social functions for the residents
- Help residents get to know one another
- Promote a sense of community
- Encourage people to renew leases

Click and Ask “What are some examples of resident activities?”

Answers may include:
- Safety seminars (Fire, Self Defense)
- Super Bowl party
- Morning Coffee “To Go”
- Nutrition and Exercise Seminars
- Neighborhood Crime Watch
- Valentines for the kids
- Mardi Gras Masquerade party
- Sporting Events
- Blood Drive

Click and Explain that a CAM should plan activities into their budgets.

Click and Explain that activities should be advertised in the resident newsletter and in notices.

Click and Read final bullet.
Display Customizing Activities — Calendar of Events slide.

Explain that events can be tailored to the time of the year. Remember to plan events that will appeal to a broad range of people. The list here includes sample Creekwood activities.
Resident Retention and Renewal

**Slide 59**
Display the section title slide and introduce the topic.

Say, Let’s take a look at a video on customer loyalty.

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<table>
<thead>
<tr>
<th>The Ultimate Question: Earn the Loyalty of Your Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Slide 60</strong> Display The Ultimate Question: Earn the Loyalty of Your Customers slide.</td>
</tr>
<tr>
<td><strong>Click to Play</strong> video.</td>
</tr>
<tr>
<td><strong>Ask</strong> for volunteers to answer questions the concept questions that review the video itself.</td>
</tr>
<tr>
<td>1. What is the difference between customer satisfaction and customer loyalty?</td>
</tr>
<tr>
<td>2. In what ways might you be responsible for &quot;bad profits&quot; or turning customers into detractors?</td>
</tr>
<tr>
<td>3. What might your promoters say about you?</td>
</tr>
</tbody>
</table>

| **Read** the summary to **highlight** key points about customer loyalty. |
| • How likely is it that you recommend this product or services to a friend or colleague? |
| • How likely is it that you recommend this product or services to a friend or colleague? |
| **This is your net promoter score.** |

| **Solicit** responses from participants and ask for their reactions and opinions. |
Resident Retention

**Display** Resident Retention slide.

**Remind** participants that resident retention begins the day the resident moves into the community.

**Click and Explain** that when residents consistently receive good customer service, they are confident about their decision to renew their residency.

**Click and Explain** that speeding up property management processes allows personnel to focus on leasing and resident service and retention.

**Click and Explain** that a resident portal can make residents feel as if they are truly a part of the community and is a big factor in retaining them.

**Click and Explain** the importance of setting convenient office hours. Many companies offer extended office hours one or two nights a week.

**Note** that there will be more information about resident portals further in this module.
**Controlling Resident Turnover**

**Slide 62**

Display Controlling Resident Turnover

**Explain** that although some residents move for reasons out of our control, a lot of potential turnover is related to controllable reasons.

**Click to show** each point and **List** controllable reasons uncovered by resident satisfaction surveys.

According to the National Apartment Association, over the past decade, turnover has consistently been between 45 and 55%.

**Ask** participants to estimate how many units they will turn over this year.

**Explain that** these are opportunities to impact resident renewals.

**Emphasize** that CAMs need to minimize the controllable reasons in order to maintain or increase resident satisfaction levels and retain residents.
Explain that a CAM should take a pro-active renewal approach to retain occupancy levels and reduce administrative, operating, and leasing costs.

Click to show each point and Review steps to reviewing renewals.

Mention that a Renewal invitation Letter is another opportunity to impact renewal decisions. Other ways of contacting residents include an initial phone call, a personal visit to the resident’s home, or scheduling a lease renewal party.

Note that a CAM should review a resident file to see how many service requests, issues or resident event attendance occurred during their residency and use it in the discussion of their life at the property.

Note the importance of being prepared to handle objections. A CAM and staff should know the facts on the cost of moving so they can educate the resident about moving costs such as:

- New deposits
- Moving and/or storage costs
- Address changes

Mention that if at any point a CAM does not want to renew a resident’s lease, the CAM may be able to send a non-renewal letter. If not, reasonable cause will need to be discovered.
Residents who Have Not Yet Renewed

**Slide 64**
Display Residents who Have Not Yet Renewed slide.

Click to show each point and Review actions to take and when to take them.

Customer Service

**Slide 65**
Display Impact of Customer Service slide.

Click to show each point and Review the impact good customer service has on residents.

Explain that outstanding customer service is a process that begins the day the future resident comes in to the office looking for information to find an apartment and continues throughout the residency.

Click to show each point and Read key point on the slide.

Note that it is a CAM’s responsibility to ensure staff provides residents with high-quality customer service.
Soliciting Feedback

Display Soliciting Feedback Techniques slide.

Explain that a CAM should ask residents for their perspective during or after every interaction.

Emphasize that soliciting feedback is key to retaining and renewing residents.

Ask “How can you regularly ask residents for feedback?”

Sample Answers:
- “What do you think?”
- “Will that work for you?”
- “Is there something that could work better?”
- “How was your experience?”
- “Is there anything we can do to make your experience better next time?”
- Encourage the speaker to talk more

Mention: Also consider doing periodic resident surveys to gauge resident satisfaction levels. You can use survey tools available on the Internet or contract with third parties who specialize in surveying renters.

Click and Explain that creating and maintaining an open pathway of communication makes a resident feel secure in providing honest feedback.

Click and Explain that continuous communication throughout their residency shows residents you are interested in what they have to say and makes them more likely to provide feedback.

Click and Read the final bullet.

Click and Read the key point.
Employee and Resident Turnover

Slide 67
Display The Employee Link to Resident Turnover slide.

Read key points on slide.

Slide 68
Display Activity: Impact of Renewal slide

Objective: Show the financial impact of renewal on a property

Duration: 5 minutes

Instructions:
- Instruct participants to complete a financial calculation about the impact of the renewal for the case study property using the information in their Participant Workbook.

Mrs. Jones has lived at Creekwood for almost five years. The market rent on her two bedroom apartment is $700/month and she is currently paying $625/month. You send her a renewal notice and quote her rent at $690.

1. What is amount of increase Mrs. Jones will pay in a year?
2. What is the financial impact if Mrs. Jones decides to move because she can’t afford the rent?
3. What is the annual rental loss on this unit if you negotiate with Mrs. Jones and adjust her renewal rent to $675?

Debrief:
- Review the answer to the calculation.
- Reinforce the importance of renewal.
**Impact of Renewal Answers:**

Mrs. Jones has lived at Creekwood for almost five years. The market rent on her two bedroom apartment is $700/month and she is currently paying $625/month. You send her a renewal notice and quote her rent at $690.

1. **What is the amount of increase Mrs. Jones will pay in a year?**

   Annual rental revenue = 
   Annual rental revenue for Mrs. Jones’ apartment increases by $780 ($65/month x 12 months = $780)

2. **What is the financial impact if Mrs. Jones decides to move because she can’t afford the rent?**

   Vacancy loss = $350 (estimate 2 weeks)
   Cost to turn vacant unit = $2,000
   Advertising expense plus any leasing commissions = $200

3. **What is the annual rental loss on this unit if you negotiate with Mrs. Jones and adjust her renewal rent to $675?**

   Loss of revenue on reducing renewal amount = $180 ($15/month x 12 months) (690 - 675 = 15 per month)
Move Out Procedures

Move-Out Notice

Display the section title slide and introduce the topic.

Display Move-Out Notice slide.

Click to show each point and Review information about move out notices.

Ask “How could you ‘save’ a move-out?”
Write answers on the whiteboard or flipchart.

Click and Explain that a CAM should try to determine the real reason the resident is moving.

Click and Explain that staff should be trained on communicating with residents who are considering a move.

Click and Emphasize that the cost to move usually far exceeds a small rental increase.
Receiving Move-Out Notice

Display Receiving Move-Out Notice slide.

Click to show each point and Review what a CAM should do when they receive a notice to move out.

Review each bullet:

- Consider roommates
- Documents that notice was sufficient
- Pre-emptive prior to move-out
- All keys from all residents
- Good to post-occupancy communication

Note that when a resident is not considered “moved out” they will continue to be charged rent.

Move-Out Letter

Display Move-Out Letter slide.

Explain that upon receipt of move-out notice, a CAM should attempt to retain the resident.

If the resident will not retract the notice, the CAM should send a letter thanking them for their residency and advising of move-out requirements.

Click to show each point and Review points to include in the move-out letter.

Move-out Inspection

Display Move-out Inspection slide.

Explain that a complete walk through will reveal any deductions that should be taken from the security deposit.

Click and Explain that photographs or video should be taken of a residence before and after occupancy to make comparisons and for visual proof.

Click and Explain reasonable deductions:
- Charge fair prices for repairs and replacements
- All charges deducted should have proper documentation, such as photos and receipts
- Do not charge for normal wear and tear

**Walk** the students through how to handle abandoned property:

- Do not remove any items from the apartment that were left behind. Follow your company’s policies and state laws.
- Recommended handling:
  - Step 1 Immediately contact the resident.
  - Step 2 If the resident says they are trash:
    - Ask the resident to fax or email permission to throw away the items.
    - Take photos.
  - If the resident tells you he or she wants to return for the items:
    - Take photos of the items
    - Set a deadline for pick-up
    - Remove items from the unit
    - Place a tag on the bag so that the items can quickly be identified, and
    - Store the items until the resident can return for them.
  - If you cannot reach the resident:
    - Take photographs of the items
    - Make an inventory list of each item
    - Place the item(s) in a bag, and
    - Send the resident a letter to notify him or her that we are storing the item(s) and will hold them up to 30 days.
    - If you still do not hear from the resident, send a final letter confirming the disposal of the item(s)
Emphasize that in all cases, follow state law regarding these remaining items!

NOTE: Often staff will inspect a resident’s apartment before they move out so that any repairs can be noted and any anticipated charges for damages can be discussed with the resident.
Deductions from Security Deposit

Slide 75

Display Deductions from Security Deposit slide.

Click and Explain that damages in excess of normal wear and tear can be deducted.

Explain that unpaid rent and utility charges can be deducted from a residents’ security deposit. Click and List and define common reasons for deductions from deposit.

Explain that when a resident is behind on rent the community manager can deduct what is owed from the security deposit when the resident moves out.

Click and Explain that rent can be prorated for the number of days the resident stayed and deducted from the security deposit.

Click and Explain that inadequate notice may require the resident to pay the full amount of rent for the balance of the notice period.

Click and Explain that the community may legally be entitled to the balance of the rent due under the lease, less any rent received for that period by the new residents.

Click and Explain that a money judgment will be issued after a court eviction, and the resident is ordered to pay rent through the date of the judgment.

NOTE: Individual states may have laws that prohibit certain deductions from security deposits. CAMs must be knowledgeable about state laws regarding security deposits.
**Legal Reasons to Terminate a Lease**

*Slide 76*
Display Legal Reasons to Terminate a Lease slide.

Click to show each point and Review legal reasons to terminate a lease.

**Holdovers**

*Slide 77*
Display Holdovers slide.

Define Holdovers:
- Residents who do not leave at the expiration of their lease term

Click to show each point and Review ways to handle holdovers. Participants should check with state laws to make sure these options are available.

**Evictions**

*Slide 78*
Display Evictions slide.

Note that laws and legal protocols dictate how evictions are handled. CAMs are expected to understand and apply the protocol.

Click to show each point and Review information about evictions and CAM responsibilities.

**Types of Eviction Notices**

*Slide 79*
Display Eviction Notice Types slide.

Explain that the first step of an eviction is to send the resident a notice.

Click to show each type of notice. Describe when it is used and what it says.
Legal Eviction Steps

Slide 80
Display Legal Eviction Steps slide.

Click to show each point and Review the proper steps to complete a legal eviction.

Note that evictions are covered by state law, so they may vary slightly from this process.

Slide 81
Display Reference: Eviction Notice Types and Legal Eviction Steps slide.

Refer participants to the Participant Workbook for:
- A summary and description of Eviction Notice Types
- A summary of Legal Eviction Steps

Review content from Participant Workbook.
### Eviction Notice Types

<table>
<thead>
<tr>
<th>Type of Eviction Notice</th>
<th>When it is Used</th>
<th>What it Says</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay rent or Quit Notice</td>
<td>Used when the resident has not paid rent</td>
<td>Gives the resident a fixed period of time within which to pay rent or move out</td>
</tr>
<tr>
<td>Cure or Quit Notice</td>
<td>Used when a resident is in violation of a certain condition of the lease</td>
<td>Gives the resident a set period of time in which to correct the violation or face eviction</td>
</tr>
<tr>
<td>Unconditional Quit Notice</td>
<td>Used when the resident has repeatedly:</td>
<td>Informs the resident that she/he must vacate the premises without an opportunity to pay rent or correct any violation</td>
</tr>
<tr>
<td></td>
<td>• Violated a lease condition</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Been frequently late with the rent</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Seriously damaged the premises</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Engaged in illegal activity</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Presents an immediate danger to the property or other residents</td>
<td></td>
</tr>
</tbody>
</table>

### Legal Eviction Steps

1. Provide notice to resident
2. Gather evidence
3. A judge decides the eviction
4. Case goes to a hearing or trial
5. Give judgment to local law enforcement
6. File a complaint with the court
Illegal Evictions  **Slide 82**

Display Illegal Evictions slide.

**Click to show** each point and **Review** actions that are illegal for a CAM to take.

**Emphasize** that self-help evictions are illegal. Do not apply the solutions shown without following state laws.

Exit Interviews  **Slide 83**

Display Move-Out Interviews slide.

**Explain** that a resident move-out interview is another opportunity to solicit resident feedback. CAMs should survey vacating residents for honest feedback on questions like:

- What did you like most about living here?
- If there was something you could change about your living experience, what would it be?
- What would it have taken to get you to sign another lease?
- Was there a particular employee that was especially helpful during your residency?
- What does your new home have that we weren’t able to provide?

**Mention** that if a resident is not available to conduct an in-person exit interview, a questionnaire can be sent to the resident’s forwarding address to elicit feedback.
Community Files and Records

**Slide 84**
Display the section title slide and introduce the topic.

**File and Retention Guidelines**

**Slide 85**
Display File and Retention Guidelines slide.

List files.

**Slide 86**
Display Reference: File and Retention Guidelines slide.

Refer participants to the Participant Workbook for a summary of File and Retention Guidelines.

Review content from Participant Workbook.
### File and Retention Guidelines

<table>
<thead>
<tr>
<th>Type of File</th>
<th>Retention Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Lease files</td>
<td>• Ongoing</td>
</tr>
<tr>
<td></td>
<td>• Lock in a cabinet at night</td>
</tr>
<tr>
<td>Inactive Lease files (&quot;dead files&quot;)</td>
<td>• Five years</td>
</tr>
<tr>
<td>Service Request files</td>
<td>• Maintain a separate file for each apartment for the life of the community.</td>
</tr>
<tr>
<td></td>
<td>• Periodically clean out insignificant work orders (loose drawers, doorknobs, etc.)</td>
</tr>
<tr>
<td></td>
<td>• and return all major items and safety items to the file.</td>
</tr>
<tr>
<td>Incident report file</td>
<td>• Five years</td>
</tr>
<tr>
<td></td>
<td>• Maintain records by month and year</td>
</tr>
<tr>
<td></td>
<td>• Keep copies of all resident notices of activity (criminal activity, policy rule</td>
</tr>
<tr>
<td></td>
<td>changes) in a separate section</td>
</tr>
<tr>
<td>Detailed Unit Status Report/Guest cards</td>
<td>• A minimum of three, preferably four years</td>
</tr>
<tr>
<td>Data Backup Diskettes</td>
<td>• Daily Backup: One week</td>
</tr>
<tr>
<td></td>
<td>• Month-end financial reports: Current year</td>
</tr>
<tr>
<td></td>
<td>• Keep in a fire-safe storage area.</td>
</tr>
<tr>
<td>Fair Housing/ADA Modifications</td>
<td>• A minimum of three, preferably four years from date of request</td>
</tr>
<tr>
<td>/Accommodation Requests</td>
<td>Denied applications</td>
</tr>
<tr>
<td></td>
<td>• A minimum of three, preferably four years</td>
</tr>
</tbody>
</table>

After a resident has moved and the security deposit has been refunded, their file should be placed in “dead files.” These files should be arranged in a logical order (typically alphabetically, by year) and kept separate from active files.
Data Destruction Rules

Display Data Destruction Rules slide. Click to show each point and Review information about data destruction rules.

Digital Property Operations

Display Digital Property Operations slide. Say “Before we end this module on the Resident Experience, let’s talk about how we use technology to manage the residential experience.” Remind participants that the purpose of computerizing property operations is to speed up management processes so personnel can focus on leasing and resident service and retention. Click to show each point and Review advantages of computerizing property operations.

Property Management Systems

Display Property Management Systems slide. Explain that software provides a centralized location for data to instantly access information. Click to show each point and Review types of information that can be accessed. Refer participants to the online CAM Reference Guide for a more in-depth discussion of property management systems.
**Online Resident Services**

**Slide 90**
Display Online Resident Services slide.

**Explain** that properties should have an online presence both to assist with marketing and to provide helpful resources for residents.

**Click to show** each point and **List** types online resources a property can offer residents.

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**Paperless Offices**

**Slide 91**
Display Paperless Offices slide.

**Review** types of electronic resources available.

**Ask** participants for other examples of how they stay efficient.

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**Electronic Documents / E-Signing**

**Slide 92**
Display Electronic Documents / E-Signing slide.

**Click** to show each point.

**Explain** that Federal law now allows for documents to be signed electronically if federal guidelines are followed. Most commonly used formats are E-Sign and DocuSign.
Wrap Up

**Slide 93**
Display the section title slide and transition into the wrap up.

**Key Points**

**Slide 94**
Display Key Points slide.

Click to show and Review Key Points.

**Slide 95**
Thank participants.
Knowledge Check Answers

Knowledge Check: Building Relationships with Residents

1. Name the key steps to building relationships:
   - Express a genuine interest
   - Be open and friendly
   - Create physical rapport
   - Be an active listener
   - Seek agreement

2. ____% of today’s renters are ethnic minorities and ____% were born outside the United States
   - 45%
   - 20%

Knowledge Check: Building Relationships with Residents

3. Name the generations in the marketplace:
   - Veterans
   - Baby Boomers
   - Generation X
   - Millennials or Generation Y
   - iGen or Generation Z

Knowledge Check: Application and Screening Process

4. You should explain to an applicant that the information collected is used for _____.
   Qualification purposes

5. What laws govern the screening process?
   - Fair Credit Reporting Act (FCRA)
   - Fair & Accurate Credit Transaction Act (FACTA)

6. What are the steps of the screening process?
   - Screen application
   - Investigate info on application
   - Reviews application and approve or deny
   - Notify prospect of approval or denial
Knowledge Check: Application and Screening Process

7. What is reviewed during a credit screening?
   - Debt to income ratio
   - Rent to income ratio
   - Acceptable accounts ratio
   - FICO score

8. You must provide notification within ___ hours of the application date.
   72

9. Regardless of approval or denial, how should you contact an applicant?
   With a telephone call.

Knowledge Check: New Resident Education

10. Name some of the basic elements of the lease.
    - Identify all parties
    - Name of community
    - Description of premises
    - Duration of lease term
    - Rent amount
    - Payment terms
    - Community policies, rules, guidelines, & regulations
    - Rights & responsibilities of each party

11. List items to discuss during new resident orientation.
    - When and how to pay rent
    - Location and use of amenities
    - Resident referral program
    - Service request procedures
    - Community policies
    - Emergencies

Knowledge Check: Ongoing Resident Communication

11. What is included in a move-in packet?
    - Lease paperwork
    - Community policies
    - A community convenience list
    - Keys
    - Welcome letter

12. When should you schedule an appointment to meet with maintenance?
    During the new resident orientation

13. Where should you provide a list of the staff with contact information and a calendar of events?
    In the resident newsletter.
Knowledge Check: Ongoing Resident Communication

14. What are some keys to communicating the rent collection policy?
   - A clear rent collection policy in writing
   - Make rent payment a habit
   - Make rent payment convenient
   - Notify before late or NSF fees
   - Be consistent and firm

15. What should you do if you suspect or hear of criminal activity?
   - Respond quickly
   - Avoid confrontation
   - Contact local law enforcement
   - Document all incidents .

Knowledge Check: Move Out Procedures

16. When does resident retention begin?
   The day the resident moves into the community

17. When is a resident considered moved out?
   When all keys are returned

18. What should you do when you receive a move-out notice?
   Send a letter thanking a resident for their residency and advising of move-out requirements

19. What are the fundamental actions you should take during a move-out inspection?
   - Use the move-in/move-out checklist
   - Photograph damages
   - Charge reasonable deductions
   - Do not remove any items left behind .

20. What are some legal reasons to terminate a lease?
    - Violation of rental agreement
    - Providing false information on the rental application or lease

21. What is a holdover?
    When a resident does not leave at the expiration of their lease term

22. What are the three types of eviction notices?
    - Pay Rent or Quit
    - Cure or Quit
    - Unconditional Quit .