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# **Director of Operations**

## **System Manual**



### **Mission Statement:**

To improve the lives of real estate investors and residents through property management solutions.

# **Systems Manual: Director of Operations (DO)**

## **KRA's – Key Result Areas**

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- 1. Hiring – p6
- 2. Team Member Coaching – p8
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- 4. Facilities / Tools Management – p15
- 5. Systems Management – p16
- 6. Paperwork Review / Approval – p18
- 7. Personal Leadership / Management development – p24
- 8. Other – p25

## **Templates:**

### **1. Office Docs**

- a. Behavioral Values
- b. Office Policy
- bb. Office Policy.pdf
- c. Letterhead
- d. Fax cover sheet

### **2. Hiring**

- a. Interview questions
- b. Reference questions
- c. New Hire Checklist
- d. Job descriptions  
- folder
- e. Compensation Package

### **3. Security Deposits**

- a. 2017 new
- b. Sec Dep Transfers  
- folder
- c. 2007-2016  
- folder

#### **4. Team Coaching**

- a. Monthly Close out schedule
- b. Customer Service touch points
- c. Grace Hill training schedule
- d. Annual review form
- e. Annual self-review
- f. Steps for team member discipline
- g. Disciplinary form
- h. PE Feedback form
- i. Continuing Education spreadsheet
- j. Team Member Files
  - folder
- k. Termination info
  - folder
- l. Turnover Checklists Received
- m. Investability Inquiry EM
- n. Team Member Anniversary Dates

#### **5. Payroll**

- a. Payroll Totals Spreadsheet
- b. Monthly compensation calculation
- c. PTO Spreadsheet
- d. Property Managers
  - folder
- e. Payroll Backup for PMs
  - folder

#### **6. RentProtect**

- a. Opt-out letter to owner - 2012
- b. Program Intro - EM
- c.
- d. Enrollment Spreadsheet
- e. Enrollment Letter B
- f.
- g. Cliffdwellers program
- h.
- i. Free Enrollment Expiration EM
- j. Email to owner re expiration of free Rent Protect
- k. 2015 Enrollment letter
- kk. 2015 Enrollment letter - PDF
- l. Payout Notification
- m. Rent Protect 2012 – 2014
  - \_ folder

**7. Other**

- a. Password template
- b. Recurring monthly calendar - DO
- c.
- d.
- e. RE Commission Sales Checklist
- f. Owner termination thank you email
- g. Misc Labels
  - folder
- h.
- i. Voice Mail messages
  - folder
- j.
- k. New unit spreadsheet
- l.
- m. Reletting fee calculations
- n. Property Foreclosure Procedures
  - folder
- o.
- p. Required Reading List
- q. CheckBook Balances
  - folder
- r. Legal Fee invoice
- s. PM notification of account shortage - EM
- t. P/E Sheet – DO
- u.
- v. Bolte Sec Dep List
- w. Forwarding address instructions
- x.
- y. 60 Day Owner Check-in EM
- z. Reasonable Accommodation & Modifications
  - folder
- zz. Completed Incident Forms
  - folder
- zzz. Google Review Request
- zzzz. Meeting Notes
  - folder
- zzzzz. New Mgmt Agreement
- zzzzzz. 2017 Employee Goals

## **Position Overview – Direct of Operations (DO)**

Reporting to the President.

The Director of Operations is accountable for the overall daily operating efficiency of the organization with a focus on the implementation, execution and management of the systems as they are designed, in order to cause Grace Management to be an exceptionally lean and profitable organization.

The primary objective of the DO is to make the team successful and to create an environment for ownership where each team member wants to be, and is responsible for their work.

The DO must bring three things to the office everyday:

1. Energy
2. Clarity
3. Accountability

The DO must be very familiar with the overall duties AND the individual System Manuals of each team member.

“Your business is perfectly designed to achieve the results you are currently getting – if you don’t like your current results – redesign your business.”

### **System Manual Overview:**

Property management done on a large scale is an extremely complex business with many moving parts. In order for Grace Property Management to be successful, it must be consistent in the way it does business.

Systems are simply road maps or instructions that allow the Grace Management processes to be repeated and easily duplicated. The purpose of the system manual is to provide a consistent way of doing business and to define HOW Grace Property Management will do property management.

Team members will be provided with position specific measures of success so that each team member always knows whether or not they are succeeding.

Team members should always refer to their specific system manual to determine the answer to a question before bringing that question to the Director of Operations.

Any deviation outside of the system must be recognized as an exception to the system. While exceptions are necessary from time to time, each exception is by nature inefficient, and should therefore be avoided.

Each team member shall constantly work to improve the system. One purpose of the monthly Performance / Evaluation meeting with the Director of Operations is to ensure that on-going system improvements are suggested, discussed, documented, and implemented.

## **1- Hiring**

**Measure of Success: Have fully vetted new team members ready to start work before the date they are needed.**

- 1) The DO must work the hiring process to ensure GM only hires team members who match ALL of the GM core values.
- 2) The decision to make a new team hire shall come from the President (PR).
  - a) The PR shall work with the DO to develop the SM and hiring requirements for a new team member.
  - b) The DO; working with the President, shall be responsible for advertising, interviewing and making the hiring recommendation to the PR.
  - c) The DO shall follow the GM hiring process and use the interview questions (template 2a)
  - d) Once the DO has selected who they believe to be the best candidate, that candidate shall also be interviewed by the PR and the PR together with the DO shall make the hiring decision.
- 3) When hiring to replace existing GM team members, the DO shall work with the PR in the hiring process.
  - a) The DO shall be responsible for advertising, interviewing and making the hiring recommendation to the PR.
  - b) The DO; working with the President, shall be responsible for advertising, interviewing and making the hiring recommendation to the PR.
  - c) Once the DO has selected candidate(s) whom they believe to be the best candidate, that candidate shall also be interviewed by the PR and the PR shall make the hiring decision.
- 4) Once a new hire has been made the DO shall ensure that before the new team member starts, they have all equipment, their System Manual, office area, and office supplies needed in order to 'hit the ground running'.
  - a) The DO shall complete the new hire file (template 2c).

- b) During the initial 90-day probationary period of a new hire, the DO shall work very closely with the new team member and have weekly meetings. The DO should micro-manage during the first 90 days.

SAMPLE

## **2- Team Member Coaching**

**Measure of Success: Provide monthly feedback so that each team member always knows how they are performing.**

- 1) The basic coaching model that the DO follows for each team member is as follows:
  - a) **Set the expectations:** Explain clearly what is expected and required of each team member for them to succeed. Everyone must know what is required of them to win.
  - b) **Coach the team member to achieve the expectations:** Give each team member the tools to succeed.
  - c) **Inspect to ensure expectations are being met:** Done at PE meetings and on-going; by reviewing the work and progress of each team member. Don't micro-manage, but you must inspect what you expect.
- 2) The DO must constantly work to balance employee results with employee retention.
- 3) The DO shall be the point of contact for each GM team member anytime they encounter a problem, question, or issue. The DO should work to guide, coach, mentor and when necessary, discipline team members.
  - a) If a problem, question or issue is brought to the attention of the DO by a team member, the DO should first ask the team member if their issue is addressed in the system manual.
  - b) If it is, have the team member review the system manual and follow the system manual.
  - c) If the issue is NOT address in the SM, the DO should work with the team member to come up with a solution (relying on the expertise of the team member), and if appropriate, add that to the team member system manual.
  - d) The DO should follow existing Grace Management office policy to resolve any issues and make every effort to resolve all issues promptly.
- 4) The DO shall step into a PM issue involving any of the following:
  - a) Pending property loan foreclosure
    - i) Discuss legal options with resident and owner.
    - ii) See template 6B – GM foreclosure procedures
  - b) Dissatisfied owner, (when deemed appropriate by the PM or DO)