
Inspection Coordinator System Manual



Purpose Statement:

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

Systems Manual: Inspection Coordinator

KRA's – Key Result Areas

* Position Overview / System Manual Overview – p3

1. Property Inspections – p4
2. Other – p7

Templates:

1. Office Docs

- a. Behavior Values
- b. Office Policy
- c. Letterhead

2. Property Inspections

- a. Resident Call Script
- b. Resident Notification of Property Inspection – EM / Phone
- c. Inspection Template Report
- d. Exception Property List
- e. Inspection Invoice Template
- f. Resident Inspection Completion letter
- g.
- h. Detailed Property Survey
- i. Completed Inspection – FOLDER
- j. Inspection Scheduler
- k. Resident EM – Charges to Account
- l. South Denver Territory

Position Overview – Inspection Coordinator (IC)

The IC will report to the Vice President of Operations.

Complete annual/occupied inspections as defined in the Grace Management Residential Inspection Coordinator System Manual.

System Manual Overview:

The system shall run the business, and the team members shall run the system.

Systems are simply road maps or instructions that allow the Grace Management processes to be repeated and easily duplicated.

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.

The purpose of the system manual is to provide a consistent and specific way of doing business, and to ensure that each property, resident, owner, and as much as possible each situation, are treated the same. Also to define HOW Grace Property Management will do property management.

The System Manual will provide each team member with specific KRA's (Key Result Areas) for which they are responsible and a specific measures of success for each KRA, 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, an exception is by nature inefficient, and should therefore be avoided.

Each team member shall consistently 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 and implemented.

1 – Property Inspections

Measure of Success: Fully complete the weekly inspection process on no less than 10 properties by end of business day each Friday.

1. All properties must be inspected one time per year.
 - a. The annual property inspection may be the only time per year that some residents have personal contact with the Grace Management office. Therefore, it is important that the IC have a high degree of customer service, be friendly and professional, and leave a good impression on the resident.
 - b. All inspections will be performed by the IC. The IC will be given a main area of responsibility, which will fall in the Denver Metro area. Should a property fall outside of this area, **it will become the PMs responsibility to complete.** The Exception is if more than one property falls into the same area outside of the Denver metro area, the IC will complete the inspections. If the PM is to complete an inspection, the IC will inform the PM when they need the inspection completed. The IC will ensure all steps are followed to complete the process in full.

North		South			
80003	80504	80002	80220	80218	80465
80004	80513	80010	80121	80218	
80019	80514	80011	80122	80219	
80020	80516	80012	80123	80220	
80021	80530	80013	80126	80221	
80023	80537	80014	80128	80222	
80026	80538	80015	80134	80223	
80027	80542	80016	80202	80224	
80031	80550	80017	80203	80226	
80229	80601	80022	80204	80227	
80233	80602	80030	80205	80228	
80234	80603	80033	80206	80231	
80235	80621	80102	80209	80232	
80249	80634	80104	80210	80236	
80260	80640	80110	80211	80237	
80304		80111	80212	80239	
80501		80112	80214	80246	
80503		80113	80215	80247	

2. Inspections are to be completed one time annually on each residential property but NOT under the following two conditions:
 - a. If the resident has been in the property less than 90 days.
 - b. If the resident has submitted a notice-to-vacate.
 - c. If the PM does NOT want the unit inspected. The PM will denote this by replying back to the IC's schedule email.
3. Before initiating contact with the resident confirm the GM office has a key. If we do not have keys call the resident to arrange a time to perform the inspection.
 - a. Don't alarm the resident that we don't have the key.
 - b. Work with the tenant to see if we can obtain a key copy.
4. Call residents a minimum of 7 days prior to the inspection date to schedule the date and time with the residents to access the property.
 - a. When leaving a phone message or when explaining the purpose of the inspection, refer to "Resident Property Inspection Explanation" (template 2a).
 - b. If you are unable to personally speak with the resident by phone, leave a voice message and then send an email or text. Use all points of contact if unable to reach residents.
 - c. The resident(s) are welcome to be present, but they do NOT need to be present at the inspection. Give them the date and time (in a 1-hour window) of the inspection.
 - d. Inspections should be scheduled Tuesday and Thursday each week, during business hours. When scheduling, try and be somewhat flexible with the resident in order to schedule the inspection during a time that is convenient for them as well as the IC. HOWEVER – the inspection schedule must be followed in order to be efficient for the IC and so the IC is able to complete all inspections each day as their schedule allows.
 - e. If the resident opts to NOT be present for the inspection, make sure they lock-up any pets that are on the property.
 - f. When leaving a phone message for the resident, leave the date and time that you will be performing the inspection.
 - aa. Give the tenant a 1-hour time window so that you have some flexibility in your inspection day in case you encounter delays.
 - bb. Informing residents by email. (ALL email addresses that we have on file) using the 'property inspection resident email (template 2B).

- g. Inform the resident that the property inspection should take approx. 20 minutes.
- h. Once the inspection is scheduled, call or text the resident the day before the inspection to 'remind' them of your appointment.
5. In preparation for the inspection bring the following:
- a. Property Condition Inspection report started in AppFolio
 - b. Residents contact information in case they are not at the property at the scheduled time, so you can call them by phone from the property if necessary. Can find this through AppFolio.
 - c. iPad if provided by Grace Management or a device to take pictures. Ensure the iPad setting is set to low level for 'e-mail' size pic. This will allow photos to be uploaded faster and more efficiently into AppFolio.
 - d. Pepper spray if provided by Grace Management
 - e. Current key to the property
 - f. Have extra co & smoke detectors on hand in case you need to install any. Have extra furnace filters and batteries for this same reason. Take any necessary tools to complete these installs and to tighten up hardware as needed.
6. Arrive promptly at the scheduled time.
- a. If you are running more than 5 minutes late call the resident by phone (or text them) to inform them.
 - b. Always knock loudly AND ring the doorbell multiple times before accessing a property even if the resident said they do not plan to be home for the inspection.
 - c. If the resident answers, greet them in a friendly and professional manner and thank them for their time.
 - d. Before you begin, ask the resident if it OK for you to walk through the property.
 - e. When entering a property, you suspect to be vacant, loudly say: "HELLO I'M WITH GRACE MANAGEMENT, IS ANYONE HOME!?" as you are unlocking the door, as you are entering the property, and as you enter different areas of the home.
 - f. Never assume a property has no one home, even if the resident said that no one would be home.

7. Safety is a goal while conducting the inspection.
 - a. If while scheduling the inspection the resident makes you feel uncomfortable or threatened in any way – DO NOT schedule the inspection. Notify the PM of your concern.
 - b. While conducting the inspection, if you feel uncomfortable or in danger at any time– leave the property immediately and call the PM after you have safely driven away from the property.
 - c. Never shut the door of any room you are in with the resident or allow the resident to do so.
 - d. Bring pepper spray with you and keep accessible throughout the inspection.

8. The purpose of the inspection is to conduct a brief overview of the condition of the property.
 - a. The inspection is NOT meant to be an overly detailed inspection of the property.
 - b. You are looking to ensure the property is being adequately maintained by the resident, for **Health, safety AND lease violations**.
 - c. The property visit should typically take around 20 minutes.
 - d. Walk the property and visually scan each room looking for damages as well as the specific items as outlined on the ‘property inspection report’.
 - e. Enter the appropriate description (Good, Ok, or Poor) on the ‘property inspection’ report. You are looking at the specified item in each room/location. If it is Good, check ok on the inspection report and indicate ‘Good’ in the comment box. If it is Ok (more subjective), check ok and leave details in the comment box. If it is Poor, check needs follow up on the inspection report and indicate why it is poor. Under the Inspection Ready for Review section – mark it as Needs Follow Up to alert PM to review. If a section is Not Applicable, delete the section from the property inspection report.
 - f. Take a picture(s) to capture the full front exterior, full back yard, each full room, as well as a detailed photo (close up) of any items that are noted as ‘poor’ condition on the report.
 - g. If a PM needs to be aware of or that item needs attention take a picture of the item and indicate this information in the appropriate section of the inspection report.
 - h. Never tell the resident that Grace Management ‘WILL’ repair or take care of a request they make, rather tell them that they would want to place that request via their resident portal. This is the preferred method. If the item

found at the property is causing property damage, the IC will enter the request or for customer service reasons the IC will enter the request.

If a work order is entered into the system, send the PM an email to notify them of this.

- i. The IC must be knowledgeable of the Residential Lease Agreement as it pertains to repairs so that they can clearly explain it to residents when questioned regarding who is responsible for a specific repair.
 - j. At the conclusion of the inspection, thank the resident for their time and quickly leave the property. If the resident engages you in long conversation, say something like the following, "I'm sorry, but I'm running late for my next appointment, so I have to be leaving."
 - k. Give the resident the 'Resident Inspection Completed Letter' (template 2f) before leaving. If the resident is not present during the inspection, leave the letter on the kitchen counter.
 - l. We will NOT give residents copies of the inspection report. Inspection reports are internal documents for Grace Management.
9. Start a property inspection report through AppFolio (following the layout of template 2C).
 - a. Start a new inspection report <https://help.appfolio.com/s/article/Start-a-New-Inspection>
 - b. Choose existing inspection as template and choose the property 2200 E. 104th.
 - c. Title the inspection name as the PM's name, the property address & the initials of the inspector. (Jessica Burrow 717 Mockingbird St MJR)
 - d. Inspection date should be the date the inspection took place.
 10. Upload the photos into the AppFolio properties inspection template using the appropriate section.
 11. Add any other notes needed in the specific area/location of report.
 12. If any lease violation is noted, the lease violation process will be handled by the PM. Indicate this information in the report so that the PM can address. Be sure to mark that area as needing the PM's attention.
 13. If any minor repairs or maintenance items are requested by the resident or noted by the IC during the inspection, flag those items on the inspection report and the PM will review