



The Power of Our Voices



Preparing for Unit Inspections &
Documenting Issues

PROPERTY MANAGEMENT – BACK TO BASICS!

Regardless of your property type or program type, these really are the basics:

1. Collect the Rent
2. Manage Vacancy Loss
3. Pay the Bills
4. Know your Budget
5. PRESERVE THE PHYSICAL ASSET!



Think of the basics in a different order.....

Preserving the physical asset first and foremost will help:

Your budget will be on track...

by reducing your Controllable Operating Expenses...

because you will have less deferred maintenance...

which will also help reduce the opportunity for major repairs
or mechanical failure!



**What basic task can help us
preserve our asset?**

ANNUAL UNIT INSPECTIONS!

Today we are going to discuss:

Understand why unit inspections are important,

Best practices for resident engagement and compliance,

Documenting housekeeping issues, benefits for landlord and tenant, and more.



Why are unit inspections so important?

Performing an occupied unit inspection ensures the habitability of the apartment is being maintained and that the asset is being preserved.

Industry Standard:

Inspections of apartment homes should be scheduled quarterly, semi-annually or most commonly *Annually!*

Unit inspections should be a written part of your preventative maintenance plan

Inspections should be documented on a unit inspection form/checklist (we will talk more about that in a moment)



Tasks:

Step 1

1. Schedule your unit inspections (the same time every year)
2. Send proper notice to your residents that is clear, concise and include helpful tips and FAQs
3. Prepare your inspection forms (have them ready to go)
4. Clear your calendars, this process should have your full time/attention
5. BUDDY UP! This is a team effort! This is not just a maintenance team task, it is the responsibility of the Community Manager and Maintenance
6. Clipboards, pens, camera!

Tasks:

Step 2

1. Start at the top and work your way down or if your building is garden-style start with the farthest building and work your way forward. *Your weekly physical walks should be done in the same way
2. Really use the form as a template, not just to document
3. One writes, one inspects!
4. Double up! Use this time wisely....jot down model/serial #'s, ages of appliances, mark batteries! Maximize this time!
5. Be mindful of your resident's feelings. Do not criticize, do not comment, be really careful what you write on the form. Do not make this personal.
6. Respect your resident's space, turn lights off, move items back into place, lock doors behind you....leave a door tag! If you have PTE and the resident is not home, use that door hanger so you do not scare the bejesus out of them!

Tasks:

Step 3

The most important

1. Gather your completed forms together and begin to categorize
2. Using 3 different colored highlighters (pink, yellow, blue) begin to highlight repairs as electrical = yellow, plumbing = blue, life & safety = pink *trust me, I will explain 😊
3. Enter work orders into your property software *Yes, you have to, it will be necessary later on!
4. Calendar your repairs, they will take time and prioritizing.
5. File your completed work orders – in two places 1)in the unit maintenance file, 2) in a binder or separate folder. *Tips of the trade – have a quick and convenient way to refer back to failed inspections or violations.....we will get into this a little later as well
6. Get ready to send your follow-up letters, violation letters and THANK YOUs!

BEST PRACTICES FOR RESIDENT ENGAGEMENT AND COMPLIANCE

Tips & Tricks of the Trade

Educate

When sending your notices of an upcoming apartment inspection include FAQs or common inspection items.

Include a copy of the signed Resident Charge Listing/Damage Listing that was provided at move-in. This will help alleviate any confusion or upset when damages are identified.

Explain the process to your newer residents who may not have gone through this process in the past.

MAKE IT FUN....incorporate Spring Cleaning tips/tricks etc.

Commit

Give it your all during this process.

Be consistent, schedule them the same time every year.

Keep to your schedule, if you run into delays....COMMUNICATE them.

It is one thing to perform the inspection but commit to performing the repair.

Be fair and consistent when identifying failed inspections or damages.

Do not just charge for damages, communicate and explain first.

Reward & Thank!

Reward the residents who take pride in their homes and make it a community for others.

Provide refreshments during Inspection Day/Inspection Week.

Send a thank you card.

Follow-up after the work has been completed

Use good judgement and replace aged carpet/flooring, paint....upgrade *if budget and company allows.



DOCUMENTING HOUSEKEEPING ISSUES, BENEFITS FOR LANDLORD AND TENANT

Unit inspections are not only a management company requirement but it is also a program specific, regulatory, city or bank requirement.

Investors are backing owners and developers with funds to build affordable housing and we as the managing agent are committed to ensure that residents are not causing damages or life safety risks.

By performing unit inspections, we are reducing the operational risk and liability against the owners

If you are a 3rd Party Management Company, you are fulfilling your management agreement and showing your owner/client that you care about their investment as if it was your own

DOCUMENT, DOCUMENT, DOCUMENT!

The notices

- Failed Inspection Notice = should be specific, should not be personal, should give the right to cure
- Follow-up Inspection Notice = documents repairs that you will be re-inspecting and the timeframe they will have to repair
- Failed Re-inspection/Failure to Comply = last notification before legal action

Documenting

- Quick and easy reference – binder system or file for potential problems in the future
- Completed work orders are your best defense if and when agencies discover an issue
- Document repairs that could lead to liability later on

What are some of
your best practice?

SHARE YOUR CRAYONS

