

Standard Operating Procedures

Document Outline

- I. [Resident Communication](#)
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Resident Communication

All communication with residents should be done through their Appfolio portal, including text messages.

The screenshot shows the Appfolio Property Manager interface. The left sidebar contains navigation links: DASHBOARD, LEASING, PROPERTIES, PEOPLE (expanded), ACCOUNTING, MAINTENANCE, REPORTING, MESSAGES, and WHAT'S NEW. The 'PEOPLE' section is expanded, showing 'Tenants' as the selected category. The main content area displays the 'Summary' for 'Abby Manor - 00' at '360 Northwestern Ave. #00, West Lafayette, IN 47906'. It shows a summary table with columns for Monthly Charges (\$0.00), Current Balance (\$0.00), Last Receipt (--), and Move Out Date (10/12/2099). Below this, the 'Tenants' section lists 'Savannah Crow' as the selected tenant. To the right of the tenant list, there are sections for 'Savannah Crow' (with a birthday of 08/31/1991), 'Contact' (with phone numbers and email addresses), and 'Addresses' (with the address 360 Northwestern Ave. #00, West Lafayette, IN 47906). The 'Email' link in the 'Contact' section is highlighted with a red box. On the far right, a 'TASKS' sidebar lists various actions like 'Enter Charge', 'Enter Credit', 'Enter Receipt', 'Charge Late Fees', 'Move Out Tenants', 'Move Out Charges', 'Send Lease or Addendum', 'Send Renewal Offer' (marked as NEW), 'NYC Lease Renewal', 'Increase Rent', 'New Service Request', 'Work Orders', 'Tenant Payable', 'Add Additional Tenant', 'Hide Tenant', 'View Application', 'View Guest Card', 'New Inspection', 'View Inspections', 'Email Unit' (highlighted with a red box), 'Text Unit', 'View Online Portal', and 'Download Text History'.

If you are needing to communicate with all residents in a unit with individual leases you can do this by going through Reporting. In the drop down of Reporting, select Letters.

The screenshot shows the Appfolio Property Manager interface. The left sidebar contains navigation links: DASHBOARD, LEASING, PROPERTIES, PEOPLE, ACCOUNTING, MAINTENANCE, REPORTING (expanded), MESSAGES, and WHAT'S NEW. The 'REPORTING' section is expanded, showing 'Reports', 'Scheduled Reports', 'Letters' (highlighted with a red box), 'Metrics', 'Surveys', and 'Compliance'. The main content area displays the 'Dashboard' with a message: 'Have you checked your Financial Diagnostics Page recently? Click here to check up on your Financial Health. Remind me in...'. Below this, the 'Move Ins' section is expanded, showing a table of future tenants. The table has two columns: 'Future Tenant Name' and 'Property - Unit'. The data rows are: Krachenfels, Kaitlyn (Quarters at West Lafayette - 336 D), Whitis, Derek J. (Park Place on Chauncey (PPOC) - 03), Wolfe, Devin T. (State Street Towers - 12), Julio, Mateo (transfer), Barron, Cody E. (University Terrace - 18), Tuey, Katherine (Napa - 08), Mohler, Blake E. (Pickwick Place - 05 - 231), and Yao, Jinghua (iMansion - 205). At the bottom, it says 'Displaying: 1-8 of 8'.

Select Blank Letters. Once on the Letters page, type in the property needed and make sure the amount owed box is unchecked.

Reports Scheduled Reports **Letters** Metrics Surveys Compliance

New Letter Editor
To get the benefits of the new letter editor, simply click "edit" on each letter you wish to convert and then click "Convert Now" on the subsequent prompt.

Click on the name of a letter to send the letter. To create a new letter, choose one of the letter types on the right.

▼ **Tenant**

Letter	Description	Action
Additional Late Fees Applied		Edit (unconverted)
Blank Letter		Edit (unconverted)
Cash Policy	Letter to send 2013-14 Tenants	Edit
Court Action Notice	Collections Notice	Edit
Cross House Utilities		Edit (unconverted)
Deposit Disposition Amount Due	This is the default letter that appears when moving out a tenant who owes money.	Edit
Deposit Disposition Refund	This is the default letter that appears when moving out a tenant who will receive a refund.	Edit

Reports Scheduled Reports **Letters** Metrics Surveys Compliance

Blank Letter

Select the filters you want and press Search, below.

Properties:

Tenant:


☐ Send separate emails & letters to each tenant

Tenant Status:
Future
Current
Notice
Past
Evict






Amount Owed: ☐ Rent Owed

Leases expiring in: ☐ Next 90 Days

After hitting search, the next page will appear. Make sure that you clear all of the Letters and Emails by hitting None. You then can select all of the residents that you need to communicate with.

☒ Email [All](#), [None](#) 
☒ Letter [All](#), [None](#)

[Cancel](#)
[LETTERS](#)
[ENVELOPES](#)
[LABELS](#)
[EMAIL](#)

Email	Letter	Tenant	Rent Owed	Status	Last Letter	Date Sent
<input type="checkbox"/>	<input type="checkbox"/>	Adam C. Wible River Cross - 01	0.00	Notice	--	--
<input type="checkbox"/>	<input type="checkbox"/>	Chester Gagnon River Cross - 02	0.00	Notice	--	--
<input type="checkbox"/>	<input type="checkbox"/>	Archana S. Choudhari, Jerin Joe River Cross - 03	0.00	Notice	--	--
<input type="checkbox"/>	<input type="checkbox"/>	Praveena Venuprasad, Nhu Nguyen River Cross - 04	0.00	Notice	--	--
<input checked="" type="checkbox"/>	<input type="checkbox"/>	David A. Duffy River Cross - 05A	0.00	Notice		07/06/2018
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ming Luo River Cross - 05B	0.00	Notice		07/06/2018
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Geonsik Yu (SI), Jose David Ramirez R... River Cross - 05C	0.00	Notice	--	--
<input type="checkbox"/>	<input type="checkbox"/>	Amitha F. Pious, Neha Shakelly, Likhi... River Cross - 06	0.00	Notice	--	--
<input type="checkbox"/>	<input type="checkbox"/>	Shengchao Li, Xiaodong Huang River Cross - 07	0.00	Notice	--	--
<input type="checkbox"/>	<input type="checkbox"/>	Sai Lakshminarayanan Balakrishnan River Cross - 08A	0.00	Notice		02/28/2019
<input type="checkbox"/>	<input type="checkbox"/>	Andrew J. Fahrenbach (SO), Brandon G.... River Cross - 08B	0.00	Notice		02/28/2019
<input type="checkbox"/>	<input type="checkbox"/>	Michael J. Kaiser River Cross - 08C	0.00	Notice		02/28/2019
<input type="checkbox"/>	<input type="checkbox"/>	Scott M. Wells River Cross - 09	0.00	Notice	--	--
<input type="checkbox"/>	<input type="checkbox"/>	Rajan Mishra River Cross - 10A	0.00	Notice	--	--

When all the residents are selected that need to be communicated with, hit the email button. It will then bring up the screen to type out the message to be relayed to the residents. After your message is typed in, hit send.

☐ River Cross - 03
☐ [Praveena Venuprasad, Nhu Nguyen](#)
River Cross - 04
☐
☐
☐
☐
☐ River Cross - 07
☐ [Sai Lakshminarayanan Balakrishnan](#)
River Cross - 08A


0.00 Notice -- -- 07/06/2018

0.00 Notice -- -- 07/06/2018

-- -- -- --

-- -- -- --

0.00 Notice -- --

0.00 Notice  02/28/2019

Send Email

Send BCC to:

Subject:

Comment:
Thank you,
Granite Student Living]

[Cancel](#) [Send](#)

1. Addressing an issue that Granite cannot control or resolve:

- a. Acknowledge Issue
 - i. Reiterate your understanding of the issue
- b. Outline facts
 - i. What Granite CAN control
 - ii. What Granite CANNOT control
 - 1. “Unfortunately, these circumstances are out of Granite’s control”
 - iii. Offer solutions or resources for them to solve the problem on their own
 - 1. “Below, I’ve provided some resources that may be of assistance to you.”
 - a. i.e. contacts with the city, utilities, information for reporting, reporting to the police, etc...
 - iv. Thank the resident, ask them if they have any questions

2. Announcements that require the tenants’ attention/action:

- a. Summarize the matter
 - i. Including time/locations
- b. Describe how it affects them
 - i. They may need to do something
 - ii. They may be disrupted in some way
- c. Outline timeline/location
- d. Describe specific actions the resident needs to take
 - i. Including deadline
- e. Describe penalty/consequences if action is not taken
- f. Thank the resident

3. Informational announcements - no action from tenants required:

- a. Summarize the matter
 - i. Including time/locations
- b. Describe how it affects them
 - i. They may need to do something
 - ii. They may be disrupted in some way
- c. Outline timeline/location
- d. Reassure them no action is necessary
- e. Thank the resident

4. Phone/In Person

- a. If possible, review Appfolio and/or their account information
- b. Listen
- c. Acknowledge you heard them & repeat back the issue as you understand it

d. Do not make any promises

- e. Let them know you will review and look into the issue further and will follow up accordingly via email

5. Text

Always start with: "Granite here!"

- a. Describe Granite action
 - i. This may be a vendor visiting their unit, an inspection, Granite visiting, etc...
- b. Describe whether or not the resident needs to do anything
 - i. If the work can be done without them present, say: "you do not need to be present while..."
- c. Thank the resident

Texts Savannah Crow (765) 430-1379 Download PDF

This person won't be able to respond to this message. You can enable two-way texting from your [company settings](#).

Granite here! Don't forget to check your email for a chance to win an incredible Sunset Flight for Two for Valentine's day! (NOREPLY)
Sent by Alaina Bower on 02/12/2018 at 10:14am

Granite Here! There will be a property inspection today 5/25 at 1:30 p.m. We will be entering some units but you do not need to be present and we will get through them as quickly as possible. Thank you!
Sent by Melissa Frazier on 05/25/2018 at 11:58am

Type your text message here...

Send Text 0/300 characters

6. Apologizing for a Granite mistake:

- a. Acknowledge that the issue was our error
- b. Empathize and apologize with tenant for how the error may have negatively affected - own the mistake
- c. How Granite will fix the problem
 - i. If we know how to solve the problem:
 1. Changing process
 2. Submit work order - or follow up with maintenance and describe how we will solve the problem for them
 3. Alert vendor to help solve problem
 - ii. If we need more information,
 1. Try to find out from the resident as many details as possible, reassure them that you will work with them toward a resolution
- d. Work toward resolution
 - i. Sometimes this might mean compensation, but don't offer money if you believe the problem can be solved through other means initially
- e. Thank the resident, ask them if they have any questions

Project Management

Projects result from:

1. Via Inspection
 - a. Internal - Preventative Inspections, noticed when doing other work
 - b. External - City (code, fire inspections), Property Owner, etc...
2. Environmental
 - a. Natural Disasters
 - b. Human - accidents or intentional damage to properties
3. Planned
 - a. Renovation/remodels/upgrades
4. Maintenance
 - a. Escalated to Project status from regular or special maintenance issue when work is expected to be multiple days and exceed \$1,500

New Projects:

1. Every time a new project arises, review all current and upcoming planned projects with the Manager to prioritize and delegate if necessary

Tracking Projects:

1. When a new project arises, create a work order in Appfolio (if not already assigned):
2. Add the project to the project tracker tab on the [Operations and Preventative Maintenance Sheet](#)
3. Document any activity, add any photos, and log any time on the WO
4. Update status as the project transitions among phases
5. At the conclusion of the project, provide a brief summary of cost totals. Reference that the project is complete and this cost information will be communicated to the owner.

Main Street 1712 - Front porch repairs

Description	Product Source/Rate	Cost
General Deck	Submittal Agency	1
3 step 100% core cast deck	J & K Supply	\$ 140.00
	Subtotal	\$140.00
CPM fee (10%)	Grande Management	\$28.00
Labor	Grande Maintenance (NCSM 07/2017)	\$1,400.00
Materials	Grande Maintenance (NCSM 07/2017)	\$84.04
Subtotal Items	Grande Maintenance (NCSM 07/2017)	\$200.00
Trig charges	Grande Maintenance (NCSM 07/2017)	\$ 140.00
	Total	\$2,062.22
		\$84.72

3-18-19...Flashing was installed to prevent water movement. Project was completed on 3/14/19. Final cost total on the project was \$2,062.22. This was \$84.72 over the original deck building estimate. Will email owner with final cost & project details.

1

Initiating a New Project with the Owners:

1. Gather a basic summary of the project to be recommended for bids
2. Create a subfolder in the property's CPM folder - Link for [example](#)
 - a. Add pictures to this folder - maximum of five photos
 - b. This will be used to share with the owner in the future
3. Email the owner with the information for the potential project
 - a. See [owner communication](#) above for email outline
 - b. If the Owner does not want to move forward
 - i. Keep information in the Google Drive folder
 - ii. File it away in the current years Denied folder

If the Owners Accept the Project For Bids:

1. Gather bids for the scope of work.
 - a. There are two types of bids.
 - i. Internal
 - ii. External
 - b. Internal Bids
 - i. Contact maintenance to retrieve the amount of hours the work will take
 1. Quote the amount of hours at highest maintenance technician price per hour

2. Extra hours are added to the original quoted hours to cover any unforeseen circumstances
- ii. Contact Inventory Procurement for the price of any materials needed
 1. Set a date to receive this information by
- iii. A bid will be needed for cleaning and painting if required
- c. External Bids
 - i. If an internal bid is being included, receive two external bids. However if there is not an internal bid, receive three external bids (if applicable).
 1. The [Operations Master](#) sheet can be referenced for vendors
 - ii. Request bids with deadlines and itemization of pricing
 1. Labor, materials, contingency, etc.
 - iii. Require bids to include when the vendor can begin the work and an estimated timeline of the work
 - iv. (If Applicable) Ask the vendor if Granite will need to prepare the work site in any way before the work begins
2. When all bids are received and reviewed, create a vendor bid comparison
 - a. Follow the [CPM explanation sheet](#) to put all bids that are received together
 - i. May have to alter the CPM bid sheet layout to properly describe the bids
 - ii. Ensure that the appropriate CPM fee is added**
 1. Estimate time to be spent getting bids, presenting work, project oversight, and follow up needed. Multiply estimated hours by highest billable rate (\$90/hr as of Oct 2022)
 2. ***This is different from what is outlined in the PMA, but leads to a more fair outcome for PO's by estimating closer to actual time invested vs basing fee on project dollar amount. Overages can be captured through a WO as described below^{††}*

Presenting the Property Owner with the Bids

1. Email the owner using the Owner Communication template under [CapX](#)
 - a. Make sure to attach the completed CPM bid sheet
2. Follow Up (See CapX Follow Up Communication)
 - a. Maximum of two follow ups after the original email (weekly basis)
 - b. If there is no response after the follow up emails have been sent file it away as denied

Project Bid was Accepted by the Owner

1. Notify the vendor that their bid was chosen by the owner
2. If Maintenance was the chosen vendor
 - a. Notify Maintenance Manager)
 - b. Create a work order
 - i. When the work order is created place CapX at the beginning so accounting will know Ops hours need to be added before processing
 1. Example - CapX: <insert work description>

3. Schedule a date and time for the work to start
 - a. Once this has been set - notify any residents that would be affected (if applicable)

When the Project Begins

1. Incorporate follow ups & regular check ins
 - a. Take photographs of each stage
 - i. Upload the pictures into the Google Drive folder that was created
2. Keep Appfolio updated
3. Communicate any setbacks delaying schedule
 - i. Property Owner : How will the setbacks affect cost?
 - ii. ****Create a WO for any extra time outside the project scope of work not covered by initial CPM fee.

Project Follow-up: Once the Vendor Work is Complete

1. Conduct a thorough walk-through
2. Schedule fix-thru work
 - a. Painting, cleaning, etc.
3. Communicate through each step of the process:
 - a. Property Owner
 - i. At the end of the project, offer a final walk-through with property owner

Final Follow-Up

1. Follow-up/walk through unit/building per schedule
2. Take finished photos/videos
 - a. Upload these to the Google Folder that was created
3. Update Appfolio with final work that was completed
4. Communicate: provide updates/final report
 - a. Property Owner
 - i. Communicate if there are any discrepancies from the original bid
 - ii. [Outline the total cost](#)
 - b. Internally
5. Oversee invoicing/billing
 - a. Verify that the work billed is accurate to the work completed and matches bids
 - i. If any discrepancies, they have already been communicated with the owner
 - ii. Make sure the correct CPM is attached to the invoices
 - iii. Confirm that Ops hours are on the work order if maintenance completed the work.

Emergency Management

General Emergencies

1. Assess the situation
 - a. If from an on-call work order, Assistant Director of Operations and Maintenance will handle the assessment and communicate to the Director of Operations
 - b. Determine cause of issue, who or what is fault
2. Communicate
 - a. Internal Update - Director of Operations and/or Assistant Director of Operations and Maintenance to notify COO, CFO immediately upon learning of the situation
 - i. Determine whether covered by renter's insurance, POPIC, or property insurance
 - ii. Check for deductible for insurance with CFO (if applicable)
 - b. With the residents (if applicable) - confer with CFO, COO on timing of communication
 - i. Compensation/Plan of Action (guidelines)
 1. Is Renter's Insurance or POPIC applicable?
 2. The time of year may determine whether the residents receive a check or a credit, if any
 - a. Credit applied if account balance plus future rent owed is more than credit
 - b. Check issued if account balance plus rent owed is less than credit
 - c. Communicate with Bulwark (if applicable)
 - i. Director of Operations to make determination as to whether event causation qualifies for coverage through damage waiver liability program
 - d. Communicate with Owners - confer with CFO, COO on timing of communication
 - i. Summary of crisis
 - ii. Triage for the situation
 - iii. Potential resident impact
 - iv. Potential property impact
 - e. Communicate with public/press (if applicable) -confer with CFO, COO on timing of communication
 - i. Forward or direct all inquiries to COO
3. Document the details
 - a. Pictures, videos, forms, and communications
 - b.
4. Repair Damage/History
 - a. Pull in necessary 3rd party vendors. If applicable, receive comparison bids
 - b. Check for warranties
 - c. Determine if work can be completed internally
 - d. Check for any possibly related surrounding work

5. Follow Up Accordingly

- a. Provide update communication to all applicable department managers, executive team, residents, owners, etc. as well as a conclusion communication upon resolving the issue.

Moisture Issues

- a. Develop inspection template
 - i. Take photos of the affected area(s)
 - ii. Utilize and record moisture meter readings
 - iii. Identify possible sources of increased moisture
 - iv. Check ventilation systems
 1. Does it appear tenant has properly used bathroom exhaust fans?
 - v. Check cleanliness of apartment or other factors that may affect moisture
 1. Take photos if applicable
- b. If it is found that spotting is present
 - i. Communicate next steps with resident
 1. Share inspection report, if pertinent
 2. Outline next steps
 3. Identify and notify resident of follow-up schedule
 4. Share resources if applicable
 - ii. Communicate with owner if applicable (all above information)
 - iii. Develop remediation plan
 1. Is it tell resident to clean?
 - a. Cite lease section 7
 2. Identify preliminary removal steps
 - a. i.e. cleaning/replacing ventilation systems, cleaning/painting spots
 3. Identify timeline for remediation
 - a. Does resident need to be relocated during remediation?
 - iv. Follow-up
 1. Inspect unit
 - a. If additional spots are found, repeat the previous steps.
 2. Communicate final observations to all relevant parties.

Type	Impact	Payout (Per Resident)	Example
Temporary Inconvenience	2 Days or Less	\$50	Extra Utility Usage, Repeat Occurrence, Etc.
Rent Proration	Not providing temp housing	Rent / 30 = Rent per day	Unable to occupy the unit

Provide Alternate Housing	Hotel/Available Units	Food per Diem*	Unable to occupy the unit
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*Total per diem calculation is outsourced/external minus expected expense of insourced/internal preparation of meals.

Lease Compliance

1. Roommate conflicts

- a. Each situation depends on the circumstances
 - i. Try to have the roommates settle the conflict among themselves
- b. If they do not think they can resolve the issue
 - i. Refer them to Purdue Dean of Students for counseling
- c. If they want out of the lease
 - i. Refer them to Leasing Department for sublease options

2. Smoking in the unit

- a. The unit where the evidence is found will be sent a warning for the first offense
 - i. Template: *This is a reminder that smoking is not permitted per your lease. As stated in section 6 "Smoking of any kind including cigarettes, pipes, hookahs, etc. is prohibited in the apartment units including any balcony or patio areas as well as in common areas. The Landlord shall be entitled to liquidated damages of Three Hundred Dollars (\$300.00) per offense should any evidence be found that would suggest a violation of the non-smoking policy." If any further evidence is found from this day forward there will be a \$300.00 fine per occurrence.*
 - ii. If pictures were taken attach those to the email
- b. If the unit has already been warned they will receive a \$300 per offense as stated in the lease
 - i. Mass building notices count as a warning
 - ii. If pictures are taken attach those to the email

3. Noise Complaints

- a. If the unit is unknown send a courtesy email to the property.
- b. If the unit is known, send an email to that unit directly.
- c. Templates:
 - i. *We have received noise complaints occurring at the building. Please remember to be courteous of your neighbors, especially in the late hours of the night/morning. As stated in your lease "Tenant shall not make or permit any disturbing noise or odors nor shall Tenant interfere with rights and comforts of the co-tenants." We have encouraged anyone that is affected by the noise to contact the police department at the time it is occurring.*

- ii. *We have received noise complaints coming from your unit. It states in your lease "Tenant shall not make or permit any disturbing noise or odors nor shall Tenant interfere with rights and comforts of the co-tenants." Please remember to be courteous of your neighbors, especially in the late hours of the night/morning. We have encouraged anyone that is having issues to contact the police department at the time it is occurring.*

4. Unit Cleanliness

- a. Pictures are usually received from leasing or operations inspector
- b. Send an email to the unit giving them a week for a chance to clean the unit themselves.
 - i. Template: *"As you are aware our Leasing department has been trying to show your apartment since you have not renewed. (This can be changed depending on the department that finds the uncleanliness) However, the poor state of your apartment has been brought to our attention. Per your lease "Tenant shall, at his own expense, maintain the premises and furnishings in clean, sightly, and healthy conditions and in good repair..." If you do not plan on renewing, your apartment will need to be cleaned in order to show it to potential lessees. If you do not believe you can clean your apartment, we can have a cleaner come in at your expense. However, if you would like a chance to clean the apartment on your own you have until Friday, December 22nd at 10:00 a.m. If the state of the unit has not changed by that date we will be sending a cleaner into your unit."*
- c. Once they have been given an inspection date, set a reminder on the calendar
- d. Inspect the unit on the date the residents were advised.
- e. If the unit was not cleaned, notify the correct cleaner based off the building to have them go into the unit
 - i. Also notify the residents that their unit was not cleaned and that a cleaner will be coming in at their expense

5. Pet In the Unit - Pet Friendly Properties

- a. Email the unit advising that an undocumented pet has been found in the unit
Template: *"It has come to our attention that there may be a pet in your unit. Animals are allowed on the property however, they do need to be documented on a pet addendum. There is a \$500 fine that can be associated with violating the pet policy within the lease. If you do have a pet in the unit please visit or contact the leasing office (contact information) to have an addendum filled out by (date) to avoid the fine. 9. Pets: Except for the pets listed in the separate Pet Addendum, no animals or pets of any kind are permitted on the premises. In addition to any other remedies provided herein, the Landlord shall be entitled to liquidated damages of Five Hundred Dollars (\$500.00) per offense if any animal is kept on the premises."*

- i. If pictures were taken of the pet attach those to the email
 - ii. Give the resident(s) a week to have a pet addendum filled out
 - iii. If the pet addendum is not filled out within that time a fine will be added to the account according to the lease
- b. Once the pet addendum has been filled out the fine can be removed from the account.

6. Pet In the Unit - Non Pet Friendly Properties

- a. Email the unit advising that an undocumented pet has been found in the unit

Template: *"It has come to our attention that there may be a pet in your unit. Please know that animals are not allowed on this specific property. There is a \$500 fine that can be associated with having an animal on the property. If you do have a pet in the unit please remove it immediately to avoid the fine. 9. Pets: Except for the pets listed in the separate Pet Addendum, no animals or pets of any kind are permitted on the premises. In addition to any other remedies provided herein, the Landlord shall be entitled to liquidated damages of Five Hundred Dollars (\$500.00) per offense if any animal is kept on the premises."*

 - i. If pictures were taken of the pet attach those to the email
 - ii. Give the resident a week to remove the pet from the unit
 - iii. If there is a special circumstance for the pet being (ESA) the resident needs to reach out to leasing to submit their paperwork for approval
 - iv. Set an inspection time for the unit a week after they were notified by email
 - Make sure the inspection is put on the calendar
- b. If the pet has been removed from the unit, no fine will be added to the account
- c. If ESA paperwork has been submitted and approved, no fine will be added

7. Illegal Subletting/Over-Occupancy

- a. Once notification has been received : send the email template below
 - i. Template: *We were informed that there is a possibility of a non-documented sublease occurring at your apartment. If there is another person staying in the unit it can be seen as over occupancy since that person is not on the lease. "In the event that the number of occupants on the premises exceeds the maximum number of occupants allowable by occupancy codes, Tenant shall be liable to Landlord for Two Hundred Fifty Dollars (\$250.00) per day as an exceeded occupancy charge." This can be referenced in section 6 of your lease. Please have a sublease filled out by <insert date>, or there will be a \$250 charge per day added to your account.*
- b. If the residents respond to the initial email, forward them onto Leasing so they can assist them with the paperwork
- c. Once the date listed above has been met and no sublease has been signed
 - i. Email the residents to notify them they will be receiving a \$250.00 fine per day until paperwork is signed

- ii. Make sure that Accounts Receivable Supervisor is BCC'd on the email to apply the fine

8. **Grill/Flammables Removal**

- a. If a grill, LP Tank, portable fuel can, lighter fluid, charcoal, fire pit, firewood, turkey fryer, or any other type of flammable item is found on the property (balcony, patio, deck, inside, etc.) inform the maintenance manager that a grill (etc.) needs to be removed (provide the property & unit number). Maintenance tech should tag grill/item with property, unit number & date of removal. Grills/items removed should be placed in storage.
- b. Inform the tenant/unit that grills (etc.) are not allowed on the property per their lease & they can set up a meeting time at storage location where they can pick up item. Tenant should be informed that grill (etc.) cannot be returned to the property from where it was removed.

Building Compliance

Elevators

1. Elevators receive certificates each year from Homeland Security
 - a. This website is for Homeland Security
 - i. <https://publicsafety.dhs.in.gov>
 - ii. Login email: operations@granitesl.com Password: Gr@nitesl1
 - b. The expiration dates for each buildings certificate is located on the Operations Master sheet
 - i. Tab is Elevator Certificates
 - ii. Safety Inspections Indiana: Verify with Inspection Company if inspection isn't filed
 1. Murphy Inspections: 800-752-6075
 2. ThyssenKrupp Inspections: Patti Miller:
 - a. Email: Patricia.miller@thyssenkrupp.com
 - b. (317) 595-1125 EXT 1913
 3. Contact DHS Elevator/Rides Indiana if Kone/ThyssenKrupp have resubmitted inspection to dhs.in.gov and the report is not showing up
 - a. Phone: (317) 232-2222 ext 3
 - b. Email: elevamuse@dhs.in.gov and rides@dhs.in.gov
 - iii. Safety Inspections Virginia: Verify with Inspection Company if inspection isn't filed
 1. Otis Elevators: 800-233-6847
 2. EEIS: 800-346-0287, admin@eeisonline.com
 3. Follow up by contacting the Town of Blacksburg for permit renewal at 540-443-1325
 - iv. Safety Inspection Wisconsin: Verify with Inspection Company if inspection isn't filed
 1. Atis Elevator Inspectors LLC: (855) 755-2847
 2. Follow up by contacting the state of WI for permit renewal at (608) 266-2112
 - v. Safety Inspection Tennessee: Verify with Inspection Company if inspection isn't filed
 1. TK Elevators: (901) 377-1993
 2. Follow up by contacting the state of TN for permit renewal at (615) 741-1900
 - c. Each year when the new certificate is received make a copy for maintenance to install in the elevator. Keep the original copy and scan it into the property folder it belongs to.
 - i. Put in a work order for maintenance to install the new certificate

- d. Make sure to update the expiration dates on the Operations Master sheet
- 2. Service Calls
 - a. When you get a call that the elevator is down/not working
 - i. Contact the company that services the elevator
 - ii. They will ask the following questions
 - 1. Is anyone trapped in the elevator
 - 2. If we know what floor it is stuck on
 - a. It is okay to not have the answers to these questions
 - iii. Make sure to get a confirmation number
- 3. Homeland Security Inspector
 - a. There is a possibility that an inspector will come through to make sure the elevators are compliant
 - b. They will need keys to the properties
 - c. We will receive a report with any violations to fix (if any)
- 4. If any invoices are received for any service or certificate it needs to go through Accounts Payable

Fire Systems

- 1. Koorsen is the main contact for any fire system related issues
 - a. Reference the Fire systems list of the properties that are not under Koorsen
 - i. Will be different for monitoring only
 - b. You will be contacted when they need to do their annual fire inspection
 - i. Put the information in as an event on the Operations Calendar
 - 1. Invite Admin on the event - they will notify the residents
 - c. Koorsen will visit the properties to test the fire extinguishers
 - i. Residents do not need to be notified
 - ii. They will need access to the buildings with codes or keys
 - iii. The inspector will also note items that maintenance can take care of such as:
 - 1. Emergency & Exit Lights
 - 2. Broken glass in the extinguisher box
 - 3. Put in a maintenance request for these items that we can fix
 - d. In case of an emergency service contact Micah directly
 - e. Any invoices received will need to go through Accounts Payable
- 2. Special projects
 - a. Some fire systems may require work outside of the scope of normal fire testing
 - i. All fire system work must be completed due to keeping the building compliant with fire codes
 - b. Have Koorsen send a quote for the work that needs to be completed

- i. Once the bid is received - if it is over \$700.00 send to the owners to make them aware of what is occurring
 - ii. After the owners have been notified send the approved bid to Koorsen and schedule the work
- c. Any invoices received should go through Accounts Payable

Property Transitions

Onboarding a Property

1. Confirm start date for management and get bids for services for the property
 - a. This may include any and all vendors that currently service other properties:
 - i. Cleaners
 - ii. Lawn Care
 - iii. Snow Removal
 - iv. Fire Systems
 - v. Elevator Company
2. All keys will need to be obtained, including the masters and individual unit keys
3. Any contracts with vendors will need to be obtained from owner or previous management company
4. Check [Property Transitions](#) spreadsheet for further detail and assignments

Offboarding a Property

5. Notify all vendors of the closing date for the property
 - a. This includes any and all vendors that work at that property, such as:
 - i. Cleaners
 - ii. Lawn Care
 - iii. Snow Removal
 - iv. Fire Systems
 - v. Elevator Company
 - b. The closing date will effectively be when their services stop or the ownership is transferred
6. All keys will need to be turned in including the masters for vendors and any employees keys for the property
7. Any contracts with vendors will need to be pulled and sent to your manager or printed out to be given to the new owner
8. Check [Property Transitions](#) spreadsheet for further detail and assignments

Inspections

1. Granite Inspections (exterior/commons)

- a. Residents do not need to be notified
- b. Walk through each building 3x per year (recommend February, June, October)
 - i. Keep an eye on potential CapX, trash, landscape, roofs, snow, pavement, bikes, gutters, etc. depending on time of year.
- c. Use checklist
 - i. Submit WO's as needed, notify Maintenance Supervisor as needed
 - ii. Take photos

2. Bike Inspections

- a. Residents are to be notified that we will be coming through and tagging/removing any bikes that do not have a permit
- b. Do inspections at the end of the school year and ~1 month after move-ins.
 - i. Example for WL: Granite requires all of our tenants with bikes to have a permit. It's a free small sticker that goes on your bike. The permit is colored with the current academic year. We require our residents to have these so we can determine if they have been abandoned. Bikes are not allowed to be stored in the hallways per the city fire inspector.
The permits can be obtained at the 225 Northwestern Leasing Office location, which is open:
Monday - Friday: 9am - 5pm
We will be coming by on [insert date], and tagging bikes that do not have permits. These bikes will be removed as early as Wednesday, January 9th. If there is a bike stored in the hallway, it is subject to immediate removal. If you have any questions please feel free to respond to this email or call our office at 765-269-7283.
- c. After the notification has been sent to the residents, schedule time on the calendar to visit each property and tag the bikes without permits
 - i. Red tags are available in the office
 - 1. They need to be labeled with Granite and the date the tag was placed
- d. Once the bikes have been tagged, a work order can be created for maintenance to remove all tagged bikes to a storage location
- e. If a resident reaches out because their bike was taken
 - i. Email through Appfolio and ask them to submit a picture of their bike or any details that they can give
 - ii. If it is determined that we have their bike set up a time to meet them at the storage location to receive their bike back
 - iii. We will not give their bike back until they receive a bike permit
- f. The bikes will sit in storage for 30 days

- i. Once 30 days has been met, contact Lee with Crosswalk to set up a time for them to pick up the bikes
- ii. Meet with Lee on the designated date to allow him to remove all of the stored bikes

3. Preventative Maintenance (PM) Inspections (all units)

- a. Coordinate with Quarterly filter changes and seasonal maintenance checks.
- b. Be on look out for smoking, pets, pests, maintenance needs, compliance issues
 - i. Create a WO for all maintenance needs
 - ii. Email Ops about compliance issues

4. City Inspections (Occupancy Inspection) (all units)

- a. You will receive paperwork from the city to fill out
 - i. Once this paperwork is submitted you will need to set up an inspection time
 - ii. Contact: Vikki Watkins Email: vwatkins@westlafayette.in.gov
- b. Notify Residents of the inspection time
 - i. Make sure it is at least a day ahead of time
- c. Meet with Inspector at the property
- d. Create WO's as needed per Inspector's instructions
 - i. If possible, align with PM Inspections to save time
 - ii. If doing PM's- fill out checklist as usual

5. Property Owner (some units- varies per owner)

- a. Notify Residents
 - i. Email the entire building
- b. Specifically go to different types of units
 - i. 1 bed, 2 bed, different layout, economy or deluxe, etc
- c. Come prepared with units/beds/resident numbers, square footage, general recent work done on building, laundry location, etc.

Groundskeeping

Mowing

Bids will need to be gathered for all properties that Granite manages mowing services on.

Property information should be sent out the first week of January to potential vendors.

Reference the No Snow/Mow list on the [Operations Master](#) sheet for properties that we do not contract lawn care services for.

1. Bid Process

a. Contact up to five vendors for bids for all properties

- i. Create a Google Sheet to list the properties and addresses as well as sections for the price per service

ii. The bid information is due on February 1st

1. Follow up with vendors bidding the work in January to remind them of the February 1st deadline

- a. This allows us to answer questions about the properties they may have

2. If the bids are not received on February 1st, reach out and see if the vendor has any properties bid

iii. The pricing structure is as follows:

1. Mowing

- a. Length of grass expected is 3.25"
- b. Should not mow if the grass is too wet, too dry, or lower than the length listed above

2. Edging occurs only as needed

3. Pickup any trash or debris on the lawn

4. Clear excess grass from sidewalks and parking lots after mowing has been completed

b. Once all bids are received - review the prices

- i. For historic information - see the [Lawn/Snow](#) data on the Operations Master sheet

2. Choose a vendor

- i. Based on the bids and information about the vendor, match the best vendor for the property owner and Granite

- ii. The awarding is separated into : On Campus and Off Campus/Lafayette

1. Typically more than one vendor is awarded properties
- b. After a vendor or vendors have been chosen a contract must be signed with the properties that they will be completing
 - i. Reference a contract example [here](#)
3. Granite will coordinate with the vendor to initiate
 - i. Lawn care services will typically start in April and continue until October
 - ii. Frequency is dependent on weather
- b. Spot check all properties on a weekly-random basis once mowing has begun
 - i. Determine if the vendor is completing their tasks properly
 - ii. If any issues are noticed - follow up with the vendor to address
 1. Examples: mowing too frequently or infrequently, not picking up trash, no edging has been completed, etc.
- c. If any complaints are received
 - i. Check the property in person to determine if further action is needed
 1. If needed contact the vendor with the issue
 2. Follow up to make sure it has been completed
4. Invoicing
 - a. Vendors should submit an invoice no later than one week after service is completed.

Leaf Removal

1. When getting bids for lawn care, also get bids for leaf removal
2. Leaf removal should not be completed until late fall
3. Leaf removal should only occur once per year
4. When the service is being completed all trash needs to be picked up
5. The leaves will need to be bagged and removed from the property
6. If it is determined that another pick up is needed, Granite will contact the vendor to service the property

Weed and Feed

1. Send inquiry to all Property Owner's to see who wants weed and feed treatment and for what properties
 - a. Give them a week to answer - if they do not respond, do not move forward with bidding services for that property owner
2. Bids for select properties for weed and feed on the lawn
 - a. The standard treatment cycle is 5 treatments per season
 - b. If the owners would like less treatments-relay this information to the vendor
3. Once the bids are received send this information out to the property owners

- a. Request that they approve or deny the services
 - b. Send follow up after one week if no response, second follow up after another week
 - i. If still no response, do not contract service for that property owner
 - c. Make sure all properties receiving the services are documented on the [Weed and Feed](#) list
4. If the services are approved, the weed and feed schedule will fall in the same time frame as mowing

Mulch/Rock

1. Each year the properties with mulch will need to be refreshed
 - a. Please reference the [Mulch/Rock list](#) on the Operations Master Project sheet
 - b. The properties that have rock will need to be checked to see if they need any touch up rock
2. Reach out to the property owners and inquire about their options
 - a. Refreshing the mulch on site
 - b. Switching the mulch to rock
 - c. No updates
 - d. Give the owners a week to respond
 - i. Follow up if no response is given
 - ii. If no response is given, do not proceed, and send final response stating nothing will be done
3. If the owner would like bids for mulch to rock conversion
 - a. Reach out to lawn care vendors to receive bids
 - i. Give them a week to get the information back
 - b. Give them all properties for bidding in bulk
 - c. Once the bid is received, organize and send the information to the owners
 - i. Give the owner a week to respond
 - ii. Advise if we do not hear back from them we will move forward with just refreshing the mulch on the property

Snow Removal

Each year bids will need to be received for snow removal. This is done the first week of September. Reference the No Snow/Mow list on the [Operations Master](#) sheet for properties that we do not contract lawn care services.

1. Bid Process
 - a. Contact between two to three vendors for bids for all properties
 - i. Create a Google Sheet to list out all properties and addresses as well as sections for the price of their services
 - ii. Give the vendor a two week time frame to have the bid completed

1. If the bid is not completed by this time - the vendor will be out for the opportunity to service our properties
 - iii. Pricing should cover the following responsibilities:
 1. Salt
 2. Sidewalks pushed at 1 inch
 3. Parking lots pushed at 3 inches
 - b. Once all bids are received - review the prices
 - i. For historic information - see the [Lawn/Snow](#) data
2. Choosing a vendor
 - a. Based on the bids and information about the vendor, match the best vendor for the property owner and Granite
 - b. After a vendor or vendors have been chosen a contract must be signed with the properties that they will be completing
 - i. Reference the contract [here](#)
3. Snow Removal Starts
 - a. Make sure to stay up to date on the weather that we will be receiving when an event is supposed to happen.
 - b. The vendor will contact you with the plan of action they would like to use for the winter weather event
 - i. If you have not heard from the vendor follow up with them to make sure they will have a plan in place if needed
 - ii. Approve or decline the plan of action
 - c. A large snow event may require properties to have snow pushed multiple times
 - i. Communicate with your superiors when a large snow event occurs on what the plan is.
 1. The information can be communicated with owners
 2. Salt should only be applied when absolutely necessary
 - ii. No outside stairways should be salted
 - d. After each snow event - rotate through the list of properties and pick at random which ones to inspect
 - i. Determine if the vendor is completing their tasks properly
 - ii. If any issues are noticed - follow up with the vendor to address
 - e. If any complaints are received at a property
 - i. Check the property in person to determine if further action is needed
 - ii. If only salt is needed
 1. Can be done internally by maintenance
 - iii. If plowing is needed the vendor for the property will need to be contacted to come back out

Pest Control

1. Resident notifies Granite
 - a. If not Pest Control - notify internally
2. Ops Pest Control contacts residents with the following:
 - a. How long?
 - b. Where in unit?
 - c. What do they look like?
 - i. Provide a sample/photo evidence

Communicate with residents

1. Plan of Action and Prep Work
 - a. **IF BEDBUGS:** it will need an inspection by the chosen pest control company.
 - b. Multiple treatments will be required when treating with a chemical solution
2. When the treatment will occur
3. Post initial treatment work
 - a. Schedule follow up date
 - b. Communicate with the resident

Sample Emails

Gathering Information -

Thanks for letting us know about your concern regarding the bugs in your unit. In order to best determine how we can help the situation, we need some further information from you. When did you first notice the problems with these insects? Where in the unit have you noticed they are typically found? It would also help to have photographic evidence of the insects in order to confirm what type of bug they are. This will help as we communicate with any potential exterminators to let them be best informed."

Monthly Treatments -

This Wednesday, 2/7, Reliable Exterminators will be coming in the morning after 9:00 am to treat each apartment. You do not need to be present or prepare in any way."

Non-Treatments

"Insert Resident Name

Thank you for emailing in your concern for the insects in your apartment. However, except on rare occasions, Granite does not treat for ants, flies, gnats, spiders, beetles, ladybugs, or other insects that are common to be found in homes or apartments.

You can purchase many types of insect spray and small can traps with insecticide bait inside for just a few dollars at local stores. If after using these options, you continue to experience problems or if the amount of insects increases to an infestation, please feel free to let us know!"

Billing general rubric

- c. Helpful link:
 - ii. <https://www.rentprep.com/property-maintenance/responsible-pest-control-landlords-tenants/>
- d. Owner pays for anything building related - not caused by the resident
 - i. Examples: known cockroach issues, bees, etc
- e. Residents will be charged for any pest issues that they have caused
 - i. Resident should try and treat general pest issues (ants, spiders, flies, mice) on their own first.
- f. Bedbug Process:
 - i. If found during move -in (prior to September) the previous resident will be charged
 - ii. Resident will be charged if bed bugs are found later than September
 - iii. Any previous bed bug history at a unit it will result in the owner being charged

Concerning Bats/Live Animals

Do not handle any live animals. (if outside call from maintenance/tenants—call Ops to handle)

If you come in physical contact with any live animal- Wash area, contact manager/ supervisor and likely go to ER (Urgent Cares typically do not carry rabies shot)

Landlord Obligations

32-31-8-5 Duties of landlord at commencement of and during occupancy

A landlord shall do the following:

- (1) Deliver the rental premises to a tenant in compliance with the rental agreement, and in a safe, clean, and habitable condition.
- (2) Comply with all health and housing codes applicable to the rental premises.
- (3) Make all reasonable efforts to keep common areas of a rental premises in a clean and proper condition.
- (4) Provide and maintain the following items in a rental premises in good and safe working condition, if provided on the premises at the time the rental agreement is entered into:
 - (A) Electrical systems.
 - (B) Plumbing systems sufficient to accommodate a reasonable supply of hot and cold running water at all times.
 - (C) Sanitary systems.
 - (D) Heating, ventilating, and air conditioning systems. A heating system must be sufficient to adequately supply heat at all times.
 - (E) Elevators, if provided.
 - (F) Appliances supplied as an inducement to the rental agreement.