



Skill Standards



Maintenance Technicians

Leasing Consultants



Portfolio Supervisors

Community Managers





NAAEI Skill Standards

The National Apartment Association Education Institute's (NAAEI) mission is to provide broad-based education, training and recruitment programs for current and future apartment industry professionals. Consistent with this mission, NAAEI facilitated the creation of skill standards for Maintenance Technicians, Leasing Consultants, Portfolio Supervisors and Community Managers. To support these skill standards, NAAEI conducted job-task analysis studies in 2007 and 2008. The skill standards are based on the validated definitions of essential tasks that can be applied to apartment management careers.

The skill standards presented in this publication identify the knowledge and skills needed by Maintenance Technicians, Leasing Consultants, Portfolio Supervisors and Community Managers in high-performance environments. The standards demonstrate to employees, job seekers and students the performance capabilities they need to succeed in the apartment industry.

The skill standards were developed with input from industry experts in order to challenge and define the elements of work and skills that are common among these industries. For workers, the standards increase opportunities to transfer job skills and expand career opportunities because the standards are applicable to companies of all sizes and geographic locations. For employers, the standards provide a benchmark for evaluating and improving their work process. NAAEI invites you to integrate the skill standards into your own training, learning and employee development programs.

How Standards Work

The skill standards describe work in a best practice, high-performance company at the level that means success for a worker in such a setting. The standards were designed to capture the work commonly performed by individuals. The skill standards address the work itself and the knowledge, skills and abilities needed to perform successfully.

The skill standards emphasize the common elements shared by the job within an area of work. The descriptions of the work have three parts:

- **Critical Work Functions:** The major responsibility of the work.
- **Key Activities:** The duties and tasks involved in carrying out a Critical Work Function.
- **Performance Indicators:** Define a measurable means of determining individual strengths and weaknesses on the job (key activities).

Skill Standards for Maintenance Technicians

Critical Work Function 1: COMPLIANCE

Key Activities

Performance Indicators

Key Activity 1.1

Performs maintenance activities in a safe and healthful manner

- Safety records show that the employee implements company policies and procedures concerning safety (e.g., fire, emergency response, first-aid, universal precautions, utility shutoffs, eye wash stations, safety showers, Material Safety Data Sheets [MSDS]).
- Safety records indicate vendors are required to comply with regulations and company safety requirements.
- Documentation indicates consistent compliance with regulations (e.g., lock-out/tag-out, personal protective equipment, respiratory protection).
- Documentation indicates consistent compliance with regulations pertaining to swimming pools and spas.

Key Activity 1.2

Abides by company policies and Fair Housing regulations

- Documentation indicates consistent compliance with regulations (e.g., apartment modifications, accommodations, communication, service requests, vendor services).
- Observations indicate appropriate response to residents and prospects.

Key Activity 1.3

Implements current local, state, and national codes when performing maintenance

- Documentation indicates consistent compliance with permitting requirements.
- Documentation indicates consistent compliance with applicable building codes (e.g., local, state, federal).
- Documentation indicates consistent compliance with regulations (e.g., HVAC, plumbing, electrical, appliances) and requirements for licensure or certification in trades.
- Safety records show periodic fire sprinkler inspections.

Key Activity 1.4

Complies with local, state, and federal regulations concerning environmental issues

- Documentation indicates consistent compliance with environmental regulations (e.g., Environmental Protection Agency [EPA], waste management, storm and waste water management).
- Observations indicate regular and appropriate use of MSDS.
- Documentation indicates appropriate response when spills and other problems occur.
- Documentation indicates essential precautions are taken for handling, using, storing, and disposing of hazardous materials.
- Documentation indicates that residents are appropriately educated on the requirements for disposing of hazardous materials and caring for surfaces containing lead-based paint.



Key Activities

Performance Indicators

Key Activity 1.5

Identifies, recommends, and implements corrective measures that minimize personal and property damage

- Documentation indicates consistent compliance with regulations, company policy and procedure, and insurance requirements.
- Documentation indicates regular property inspections using established checklists and communication protocols.
- Documentation indicates consistent compliance with the company key control policy and procedures.

Key Activity 1.6

Reports and documents maintenance activities in adequate detail

- Files contain sufficient documentation of inspections, incidents, service requests and maintenance activities.
- Files contain logs for pools, snow and ice removal, lights, vehicles, mold and refrigerants.

Critical Work Function 2: FACILITIES OPERATIONS

Key Activity 2.1

Actively participates in daily meetings of the maintenance team to organize and assign duties

- Participates in daily meetings of the maintenance team to organize and assign duties.
- Meeting agendas indicate appropriate topics are addressed, adequate knowledge of facility needs, company policy and objectives, and effective time management.
- Observation indicates leadership ability and knowledge of staff capabilities.

Key Activity 2.2

Maintains curb appeal

- Appearance of the facility(ies) is consistent with company standards.
- Documentation indicates that opening and closing procedures are followed routinely.
- Documentation indicates that issues related to safety and hazards are observed, noted and dealt with appropriately.

Key Activity 2.3

Maintains recreational facilities

- Documentation indicates that recreational facilities are inspected and maintained so they operate as intended.
- Documentation indicates consistent compliance with policies for operating and maintaining lighting, locks, and other components of common areas.
- Documentation indicates that water in pools, spas and other water features are treated appropriately.

Key Activity 2.4

Responds to maintenance requests competently

- Service request records indicate that corrective measures are consistent with the basic principles of electrical, plumbing, mechanical, irrigation, HVAC, carpentry, painting and drywall, roofing, flooring, and appliance systems.
- Observation of the facility(ies) indicates safe and effective pest control.
- Observation of the facility(ies) indicates that landscaping adheres to company policy and requirements for the safe and effective use of landscaping chemicals and equipment.
- Follow-up records with residents indicate satisfactory customer service.
- Documentation indicates consistent compliance with company policies concerning locks and keys.



Key Activities

Performance Indicators

Key Activity 2.5

Manages vendors and vendor services

- Manages vendors and vendor services.
- List of company-approved vendors is kept up to date with evaluation of quality and timeliness of vendor services.
- Documentation indicates compliance with company procedures for specifying work to be performed by vendors.
- Documentation indicates inspection of vendor projects with appropriate feedback to vendors.

Key Activity 2.6

Brings apartment homes to ready-to-rent status

- Brings apartment homes to ready-to-rent status.
- Documentation indicates consistent compliance with company policy, procedure, and standards related to ready-to-rent maintenance services.
- Records indicate that ready-to-rent services are consistent with the basic principles of electrical, plumbing, mechanical, irrigation, HVAC, carpentry, painting and drywall, roofing, flooring, pest control, landscaping, appliance, electronic device, and locking systems.
- Documentation and observation indicate appropriate use of parts, materials and tools.
- Documentation indicates appropriate management of timelines, vendors and maintenance staff.

Key Activity 2.7

Manages a program of preventive maintenance

- Manages a program of preventive maintenance.
- Documentation indicates consistent compliance with the company's policy and procedure related to preventive maintenance.
- Documentation indicates consistent compliance with pertinent codes and regulations and manufacturer guidelines.
- Records indicate that preventive maintenance services are consistent with the basic principles of electrical, plumbing, mechanical, irrigation, HVAC, carpentry, painting and drywall, roofing, flooring, pest control, landscaping, appliance, electronic devices and locking systems.

Critical Work Function 3: TRAINING AND TEAM MANAGEMENT

Key Activity 3.1

Follows an ongoing program that builds professional and technical skills

- Documentation indicates training offered by competent sources addresses the needs of the individual and company.
- Observation indicates ethical dilemmas are resolved in accordance with prevailing standards of conduct.
- Observation indicates patterns of behavior are appropriate within the apartment community.
- Observation indicates that newly acquired knowledge and skill are applied on the job.



Key Activities

Performance Indicators

Key Activity 3.2

Automates work when possible

- Observation indicates compliance with company policy and procedures concerning the use of computers.
- Observation indicates facility with word processors, spreadsheets, databases.
- Observation indicates facility with the Internet, including search engines, accessing credible Web sites, common procedures for ordering equipment and supplies online, and online training.
- Observation indicates facility with electronic mail systems.
- Observation indicates facility with common computer hardware.

Key Activity 3.3

Serves as a positive role model

- Observation indicates support for the company's mission, vision, culture and core values.
- Team member comments indicate appropriate leadership and sound, mature judgment.

Key Activity 3.4

Demonstrates appropriate patterns of behavior, communication, and appearance

- Observation indicates support for the company's mission, vision, policies, procedures, and prevailing standards for behavior and appearance.
- Observation indicates a positive attitude about compliance with Fair Housing, EEOC, and other employment laws and regulations.
- Clothing, behavior, and communication are appropriate for job responsibilities, including supervisory duties.

Key Activity 3.5

Communicates effectively with various internal and external customers

- Observation indicates communication is appropriate for different situations and individuals.
- Feedback from various individuals (residents, co-workers, supervisors) indicates clear understanding and productive relationships are achieved.
- Observation indicates that company standards for communication are met consistently.

Key Activity 3.6

Cooperates with and demonstrates respect for team members

- Observation indicates behavior is consistent with company policy, procedure, culture and core values.
- Observation indicates behavior is consistent with owner's objectives.
- Feedback from team members indicates effective team building, motivation, coaching and mentoring.
- Observation indicates effective leadership.

Key Activity 3.7

Provides targeted and effective on-the-job training

- Documentation indicates that on-the-job training meets the skill deficits of team members.
- Feedback indicates on-the-job training is individualized to team members' learning styles.
- Observation indicates effective use of a variety of teaching styles (e.g., learning by doing, hands-on learning).
- Observation indicates effective coaching and mentoring.
- Observation indicates effective assessment of team member needs and learning through on-the-job training.



Key Activity 3.8

Builds effective team by participating in the hiring process

- Observation indicates that employment recommendations are consistent with the owner’s goals and objectives, company policy, procedure, culture and core values.
- Documentation indicates consistent compliance with the company’s established hiring and interviewing process.
- Documentation indicates consistent compliance with applicable employment laws and regulations.
- Observation indicates that hiring recommendations meet the skill needs of the team.

Critical Work Function 4: PROJECT MANAGEMENT

Key Activity 4.1

Coordinates capital projects effectively

- Project documentation indicates knowledgeable analysis of existing assets, materials and systems.
- Specifications indicate understanding of materials and methods that are appropriate to capital needs and objectives.
- Observation indicates competent reading of blueprints and other project documents.
- Observation indicates effective communication of project elements to owner.

Key Activity 4.2

Estimates time and material effectively

- Project documentation indicates consistent verification of measurements and materials specified by contractors and team members.
- Observation indicates knowledge of market conditions as they affect the availability and pricing of goods and services.
- Documentation indicates knowledge of specialized equipment and regulations.
- Documentation indicates consistent compliance with budget limitations.

Key Activity 4.3

Manages the bidding process fairly and effectively

- Documentation indicates consistent compliance with prevailing business ethics, bidding process and bidding procedures.
- Observation indicates familiarity with qualified and experienced contractors in the community.
- Documentation indicates correct implementation of prequalification procedures.
- Observation indicates the evaluation of bids relative to the expressed scope of work and selection criteria.
- Observation indicates effective use of negotiation strategies.
- Observation indicates reasonable understanding of common terms of contracts.

Key Activity 4.4

Displays permits as required

- Documentation indicates permits are displayed in compliance with codes and regulations.
- Documentation indicates appropriate pre-inspections to ensure projects meet codes and regulations.



Key Activities

Performance Indicators

Key Activity 4.5

Checks material specifications to confirm deliveries

- Documentation indicates compliance with procedures for confirming and accepting deliveries.
- Observation indicates deliveries are communicated appropriately.
- Documentation indicates essential knowledge of project specifications, material needs and schedules.

Key Activity 4.6

Supervises projects and contractors effectively

- Observation indicates frequent inspection of projects relative to the planned scope of work, quality requirements and deadlines.
- Documentation indicates communication with contractors is sufficiently frequent and focused on issues and concerns.
- Documentation indicates appropriate response when safety violations occur.
- Observation indicates skill in managing contractors, vendors and team members.

Key Activity 4.7

Communicates with project stakeholders to ensure understanding and resolve issues

- Communication indicates thorough knowledge of project components.
- Observation indicates communication is appropriate for different individuals, purposes and settings.
- Observation indicates thorough understanding of company objectives, requirements, risks and standards.
- Documentation indicates concern for appropriate management of risk and liability.
- Observation indicates a desire to solve problems.

Key Activity 4.8

Approves final payments after inspection of completed project

- Documentation indicates thorough inspection of completed projects, using project specifications and contract documents, before authorizing payment.
- Observation indicates a desire to solve problems.
- Observation indicates ability to communicate effectively with various individuals in a variety of settings.
- Documentation indicates consistent compliance with established approval procedures.

Critical Work Function 5: FINANCIAL MANAGEMENT

Key Activity 5.1

Identifies trends, researches new technologies and makes informed recommendations

- Observation indicates facility with computers.
- Observation indicates understanding of the components of a budget, construction practices, current technologies, property history and trends, and owner's goals and objectives.
- Documentation indicates consistent compliance with established procedures for recommending projects.
- Documentation indicates ability to extract meaningful information from property history and trends and make realistic forecasts about economic trends and the needs of the property and company.
- Documentation indicates accuracy in performing typical budget calculations.



Key Activities

Performance Indicators

Key Activity 5.2

Manages the maintenance budget effectively

- Documentation indicates accuracy in tracking expenditures.
- Observation indicates accurate interpretation of common financial reports.
- Documentation indicates careful monitoring, accurate forecasting, and reasonable decision making as adjustments are required.
- Observation indicates consistent application of the owner's goals and objectives.
- Observation indicates reasonable control over expenses and inventory.

Key Activity 5.3

Makes cost effective repair/replace decisions

- Observation indicates thorough understanding of company policy and procedure, quality standards and the needs of residents.
- Documentation indicates well reasoned analysis of the cost of parts, repairs, scheduling options and labor relative to the life expectancy of various options and products.
- Documentation indicates reasonable decision making that balances the needs and concerns of stakeholders.



Skill Standards for Leasing Consultants

Critical Work Function 1: COMPLIANCE

Key Activities

Performance Indicators

Key Activity 1.1

Conduct an internal assessment of product, price, people and promotion

- Internal assessment reports indicate understanding of the purpose of an internal assessment and relevant principles (e.g., supply and demand).
- Internal assessment reports indicate the use of appropriate resources and tools.
- Internal assessment reports indicate the use of appropriate strategies for gathering and analyzing data and drawing conclusions.
- Internal reports indicate the use of appropriate technology.

Key Activity 1.2

Conduct an external assessment of competitive products, prices, people and promotions

- External assessment reports indicate understanding of the purpose of an external assessment and relevant principles (e.g., supply and demand).
- External assessment reports indicate the use of appropriate resources and tools.
- External assessment reports indicate the use of appropriate strategies for gathering and analyzing data and drawing conclusions.
- External reports indicate the use of appropriate technology.

Key Activity 1.3

Monitor internal and external market dynamics

- Marketing tools indicate understanding of factors that impact financial performance.
- Marketing tools indicate the use of appropriate market data and strategies for its interpretation.

Key Activity 1.4

Compile a personalized and comprehensive community resource tool

- Resource tool(s) include floor plans, prices, availability and other appropriate information.
- Resource tool(s) are effective and efficient.
- Resource tool(s) are maintained on an ongoing basis to ensure accuracy.
- Resource tool(s) indicate use of appropriate technology.

Key Activity 1.5

Network with representatives of competing organizations to improve business decision making

- Networking indicates the use of interpersonal communication and networking strategies.
- Networking indicates understanding of confidentiality obligations.
- Calendars indicate participation in networking opportunities (e.g., apartment association events, attending open houses).



Critical Work Function 2: OUTREACH MARKETING

Key Activity 2.1

Develop a marketing strategy based on identified strengths, weaknesses, opportunities and threats

- Marketing strategy indicates understanding of strategic analysis and use of appropriate sources of data (e.g., SWOT [Strengths, Weaknesses, Opportunities and Threats], marketing surveys).
- Marketing strategy indicates use of appropriate marketing and industry terminology.
- Marketing strategy includes an accurate understanding of the competition.
- Marketing strategy indicates the use of appropriate technology.

Key Activity 2.2

Work to achieve marketing goals

- Activity logs indicate understanding of the marketing goals and strategies of the community.
- Observation indicates commitment to goals.
- Marketing strategies are consistent with available resources and budget.

Key Activity 2.3

Create a viable and effective action plan to achieve marketing goals

- Observation indicates knowledge of the surrounding area (e.g., preferred employers, current and targeted resident demographics, amenities, resources of the region, regional economic development plans and materials).
- Observation indicates effective networking with organizations in the region.
- Activity logs indicate effective planning (e.g., use of marketing collateral, organization and documentation of marketing calls).

Key Activity 2.4

Evaluate the marketing plan's effectiveness

- Periodic reports indicate understanding of marketing goals and strategies.
- Observation and periodic reports indicate effective use of an appropriate prospect management system.
- Periodic reports indicate understanding of statistical data related to site traffic trends, existing marketing campaigns and tools.
- Periodic reports indicate the use of appropriate technology.

Key Activity 2.5

Refine the marketing strategy

- Marketing goals are consistent with ongoing analysis and trends.
- Observation indicates effective brainstorming and testing of new strategies.
- Marketing strategies are consistent with current goals and trends.
- Marketing strategies are consistent with available resources and budget.

Critical Work Function 3: SALES

Key Activity 3.1

Inspect tour routes, vacant and leased homes, and common areas daily

- Work orders filed with the maintenance department indicate daily monitoring.
- Work orders indicate understanding of curb appeal, company policy and procedure, community standards and the importance of details.



Key Activity 3.2

Establish rapport with current and prospective residents

- Observation indicates effective knowledge of the product, confidentiality requirements and Fair Housing regulations.
- Observation indicates effective use of interpersonal communication (e.g., personal appearance and demeanor, techniques for gathering information, cultural competence, effective listening).
- Sales logs indicate effective use of documentation strategies.

Key Activity 3.3

Qualify prospective residents in accordance with rental policy

- Documentation indicates understanding of qualifying criteria, company policy, and relevant laws and regulations (e.g., Fair Credit Reporting Act [FCRA], Fair Employment and Housing Act [FEHA]).
- Documentation indicates use of appropriate sources of information (e.g., credit reports, criminal history, tax records).
- Documentation indicates appropriate communication.
- Documentation indicates the use of appropriate technology.

Key Activity 3.4

Articulate how the company and product meet the needs of customers

- Observation indicates the use of appropriate demonstration techniques and product knowledge.
- Observation indicates reference to known needs of the customer.

Key Activity 3.5

Evaluate customers' commitment level

- Observation indicates a request for feedback from the customer.
- Observation indicates effective interpretation of customers' verbal and nonverbal cues.
- Observation indicates recognition of typical buying signals.

Key Activity 3.6

Address customers' stalls and/or objections

- Observation indicates understanding of typical stalls and objections as well as the difference between stalls and objections.
- Observation indicates the use of problem solving techniques and other strategies for overcoming stalls and objections.
- Observation indicates appropriate empathy with customers.

Key Activity 3.7

Ask customers to hold an apartment

- Observation indicates appropriate timing and strategy in closing sales.
- Observation indicates appropriate timing and strategy in managing rejection.
- Documents and financial records indicate understanding of policies related to handling various forms of payment.

Key Activity 3.8

Discuss the next steps in the sales process to set customer expectations

- Documentation indicates understanding of company policy, process for preparing apartment for move in, and follow-up activities.
- Documentation indicates communication of a realistic and appropriate timeline for essential events and move in.
- Documentation indicates effective coordination of move-in resources, as well as information packets.



Key Activity 3.8

Discuss the next steps in the sales process to set customer expectations

- Documentation indicates understanding of company policy, process for preparing apartment for move in, and follow-up activities.
- Documentation indicates communication of a realistic and appropriate timeline for essential events and move in.
- Documentation indicates effective coordination of move-in resources, as well as essential forms and information packets.

Key Activity 3.9

Evaluate personal sales performance

- Documentation indicates measurement of closing ratios and/or conversion ratios.
- Documentation indicates the use of feedback from prospects, company expectations, and experience with customers in evaluating personal performance.
- Documentation includes appropriate goals for improvement and action plans.
- Observation indicates implementation of appropriate change in sales strategy.

Critical Work Function 4: ADMINISTRATIVE AND LEGAL RESPONSIBILITIES

Key Activity 4.1

Apply Fair Housing law as it affects rental transactions

- Documentation of interaction with current and prospective residents indicates knowledge and consistent application of the law.
- Observation of interaction with current and prospective residents indicates consistent application of the law.

Key Activity 4.2

Ensure potential residents' understanding of rental criteria

- Documentation indicates compliance with Fair Housing and consistent qualifying standards as well as company policy and procedure.
- Observation indicates clear and consistent communication about qualifying standards, the rental process, and company policy and procedure.

Key Activity 4.3

Evaluate rental applications in accordance with established screening models

- Documentation indicates implementation of company credit screening policy and procedure.
- Documentation indicates understanding and application of community standards and FCRA requirements.
- Documentation indicates the use of established screening models
- Documentation and observation indicate appropriate communication of approval or denial decisions.
- Documentation and observation indicate the use of appropriate hardware and software.

Key Activity 4.4

Prepare lease agreements in accordance with established policy and procedure

- Lease agreements comply with laws pertaining to the execution of contracts.
- Lease agreements include essential components.
- Lease agreements comply with standards and company policy and procedure.
- Observation indicates clear and accurate communication about the components of lease agreements.
- Lease agreements indicate the use of appropriate technology.



Key Activity 4.5

Execute lease agreements appropriately

- Documentation indicates that appointments are made with customers for the execution of lease agreements.
- Observation indicates understanding of the components of lease agreements and laws related to their execution.
- Observation indicates clear and consistent communication with customers about lease agreements.

Key Activity 4.6

Report incidents, maintain documentation, and take corrective action in compliance with applicable law, regulation, and company policy

- Documentation and observation indicate recognition of potential liability exposure (e.g., risk events, privacy).
- Documentation indicates compliance with reporting requirements.
- Documentation indicates cooperation with others as required to address exposure and resolve identified issues.
- Documentation indicates clear and consistent communication related to the exposure.
- Documentation indicates the use of appropriate hardware and software.

Key Activity 4.7

Maximize revenue and operational efficiency consistent with financial goals

- Documentation indicates compliance with company fiscal policy and procedure and recognition of the financial impact of actions.
- Documentation and observation indicate commitment to community standards, personal and team goals, and financial expectations.
- Observation indicates personal initiative in maximizing revenue and efficiency.

Critical Work Function 5: RESIDENT RETENTION

Key Activity 5.1

Offer personalized service to residents

- Documentation indicates the ongoing assessment of resident concerns as well as an appropriate response.
- Observation indicates appropriate customer service that complies with community standards and company policy and procedure.
- Observation indicates that interpersonal verbal and nonverbal communication is accurate and appropriate, and accounts for cultural differences appropriately.

Key Activity 5.2

Interact with residents using empathy and warmth

- Observation indicates appropriate customer service that complies with community standards and company policy and procedure.
- Observation indicates that interpersonal verbal and nonverbal communication is accurate and appropriate, and accounts for cultural differences appropriately.
- Activity logs indicate appropriate follow through on commitments to residents.
- Observation indicates creation of “win-win” situations with residents.



Key Activity 5.3

Respond to issues that affect resident satisfaction

- Observation indicates appropriate customer service that complies with community standards and company policy and procedure.
- Activity logs indicate appropriate communication with the maintenance department and vendors as required to resolve residents' concerns.
- Activity logs and observation indicate the use of appropriate strategies for resolving conflict.
- Observation indicates appropriate and empathic communication with residents.

Key Activity 5.4

Report service requests accurately and follow up as appropriate to ensure resident satisfaction

- Activity logs and work orders indicate knowledge of company policy and procedure, community standards and maintenance terminology.
- Activity logs and work orders indicate follow through on service requests and commitments to residents.

Key Activity 5.5

Create an ongoing sense of community

- Activity logs indicate promotion of amenities and activities that are meaningful to residents and increase interaction among residents.
- Activity logs and observation indicate understanding of resources of the property and region, company policy (e.g., alcohol) and budget, and legal requirements.
- Activity logs and observation indicate understanding of resident preferences.
- Activity logs and observation indicate clear and effective communication with residents to promote an ongoing sense of community.

Key Activity 5.6

Maintain familiarity with lease renewal processes

- Documentation indicates compliance with company policy and procedure related to the renewal process.
- Documentation indicates understanding of renewal options and market conditions.
- Observation indicates clear and effective communication with residents about renewal.



Skill Standards for Portfolio Supervisors

Critical Work Function 1: EFFECTIVE LEADERSHIP

Key Activities

Performance Indicators

Key Activity 1.1

Recruits candidates by implementing hiring strategies that will result in the selection of high-performing employees

- Hiring records indicate the use of appropriate recruitment sources and methods, employee screening processes, and interviews, as well as consistent compliance with laws pertaining to the selection of employees (e.g., EEO, ADA, FCRA, FACTA).
- Documentation indicates consistent compliance with the creation and implementation of well-defined job descriptions, job performance standards and orientation materials.
- Hiring records indicate reasonable decision making about employee compensation.
- Hiring documents include thorough and appropriate tools (e.g., interview guides, referral programs, job descriptions, sample offer letters, reference checking procedures).

Key Activity 1.2

Improves employee performance through team building, career development, coaching and feedback in order to foster employee engagement and longevity and to meet operational goals

- Training records indicate the consistent use of appropriate methods of employee training, development, and retention taking different learning styles and individual differences into account.
- Documentation indicates that appropriate needs and gap analyses are performed to identify appropriate performance and development interventions.
- Human resources records indicate the use of an appropriate performance management process that incorporates continuous feedback while setting performance standards and goals.
- Documentation indicates the appropriate use of coaching and mentoring for staff's development of both technical and interpersonal/leadership skills (e.g., time management, team building, delegation techniques, communication, diversity).

Key Activity 1.3

Addresses employees' performance and behavior deficiencies by reinforcing job standards with counseling in order to improve organizational effectiveness

- Human resources documentation (e.g., forms, policies, procedures) indicates a performance improvement plan to address performance issues.
- Human resources documentation indicates compliance with legal requirements, company policies and best practices concerning the discipline and/or termination of staff.



Key Activity 1.4

Maintains positive stakeholder relationships by communicating effectively (both in writing and verbally) in order to minimize conflict and misunderstandings

- Documentation indicates the use of effective conflict management techniques, including written and oral communication.
- Email records indicate the employee's use of proper etiquette during communication about information with which the employee may not agree and when enforcing company policy.
- Documentation indicates compliance with company problem solving techniques by adjusting communication style, thinking strategically and representing the interests of stakeholders.

Key Activity 1.5

Demonstrates ethical behavior by identifying and avoiding situations that challenge standards of conduct in order to mitigate conflicts of interest and other inappropriate actions

- Documentation indicates that the employee understands the difference between law, ethics and morals.
- Records demonstrate that the employee recognizes the types of ethics in vendor relationships and workplace harassment, and ways of treating people appropriately and consistently.
- Documentation indicates the employee's effective response to harassment complaints (e.g., documentation, taking action immediately).

Critical Work Function 2: FINANCIAL MANAGEMENT

Key Activity 2.1

Identifies sources of data and research needed to prepare the annual operating budget in order to meet established owner objectives for financial performance

- Documentation indicates that the employee understands the important components of a budget as well as the tools and software for constructing budgets, operating statements and variance explanation reports.
- Work products and reports indicate that the employee uses appropriate resources for research (e.g., Web searches, industry data) when exploring current market conditions and economic indicators and when future financial performance.
- Documentation indicates that the employee performs financial calculations (e.g., turn-over percentage, operating expense ratio, bad debt percentage, effective rent) in order to create a budget, present assumptions and eventually explain variances.

Key Activity 2.2

Analyzes financial statements in order to prepare reports for stakeholders and make appropriate operational adjustments

- Documentation indicates that the employee understands accounting methods, bookkeeping practices, general ledger reporting and the use of property management software.
- Documentation indicates that the employee uses apartment valuation methodologies correctly and understands the risks and motivations associated with apartment investment.
- Documentation indicates that the employee is proficient in maximizing revenues and controlling expenses to improve property Net Operating Income (NOI).



Key Activity 2.3

Interprets property results by preparing required reports for senior management company personnel, lenders and owners in order to track progress toward property and portfolio objectives

- Documentation indicates that the employee is proficient in preparing report contents and presents operating results with appropriate variance explanation and proactive corrective measures as required.
- Observation indicates that the employee uses appropriate tools and software to analyze property performance measurements, financial operating statements, and other data sources, including historical operating data.
- Observation and documentation indicate that the employee proactively provides alternatives to improve performance, reforecast future financial performance and improve staff performance.

Critical Work Function 3: PROPERTY EVALUATION AND DUE DILIGENCE

Key Activity 3.1

Manages due diligence process by collecting data and preparing a report in order to make an acquisition, disposition, or refinancing recommendation to the owner

- Documentation shows the employee references appropriate sources of data for evaluation reports (including outside professionals), prepares reports using materials gathered during the inspection process and adheres to confidentiality requirements.
- Documentation indicates that the employee makes recommendations to the property buyer or seller regarding future courses of action after analyzing results.
- Documentation and observation indicate that the employee understands multifamily ownership structures.
- Reports illustrate that market conditions as well as compliance requirements (e.g., environmental, workplace safety, accessibility, landlord-tenant) were examined and evaluated, identifying potential liabilities, asset preservation issues, exit strategies and existing staff.

Key Activity 3.2

Establish a process for property takeover by developing schedules and checklists in order to ensure a smooth and timely transition

- Records show that retained employees are trained in the policies and practices of the new management company and residents are informed of the changeover in a timely manner.
- Records indicate that the employee establishes priorities and delegates takeover responsibilities to staff when managing a property takeover, all while complying with local, state and national requirements, and the terms and conditions of the takeover.
- Records illustrate that the employee effectively managed the process by following documented procedures.



Key Activity 3.3

Develops a capital improvements plan in order to maintain market position and meet ownership objectives

- Records indicate that the employee can differentiate between minor rehabilitation and deferred maintenance needs and major capital improvement needs by analyzing the real estate market and weighing both functional and economic obsolescence conditions and property needs.
- Contract management documentation shows that the employee manages time effectively when developing scopes and work and bid specifications, analyzing bids, selecting appropriate vendors and negotiating contracts.
- Documentation indicates that the employee is proficient in complying with federal requirements and all applicable building codes and local permit requirements when implementing physical improvements to an establishment.

Critical Work Function 4: LEGAL RESPONSIBILITIES AND RISK MANAGEMENT

Key Activity 4.1

Identifies the potential areas of risk on a property by ensuring inspections are conducted and action taken to minimize property loss or personal injury

- Records indicate that property inspections to identify and mitigate risk take place, and that necessary follow up procedures for controlling and preventing loss are practiced, in order to ensure that sound risk management practices and incident reporting procedures are in compliance.
- Documentation and observation indicate that the employee understands responsibilities for communication with staff, residents and outside parties.
- Documentation indicates that the employee ensures the preparation of an emergency response plan.

Key Activity 4.2

Minimizes legal risk and liability by studying applicable laws, regulations and company policies

- Documentation indicates that the employee ensures staff training needs are identified and met concerning laws and applicable policy related to Fair Housing and other legal or regulatory requirements.
- Documentation indicates that the employee provides counseling and coaching as necessary to improve performance.
- Documentation indicates that the employee complies with and properly references legislation regarding Fair Housing rights, equal employment opportunity laws, workplace health and safety (e.g., OSHA, MSDS, EPA, lockout/tagout), labor relations laws, proper occupancy standards, regulatory compliance on local, state and federal levels.
- Contract management documentation shows that the employee effectively determines the scope of work and contract requirements and manages the bid process and negotiations as required.
- Documentation indicates that the employee is aware of all legal commitments and ramifications of the American with Disabilities Act (ADA), understands the concept of accessibility, and is effective when addressing reasonable accommodation/ modification requests.



Key Activity 4.3

Prepares for regulatory agency oversight of assisted housing property operations by reviewing applicable physical inspections, financial reviews, and occupancy audits to ensure compliance with regulatory requirements

- Documentation indicates that the employee is knowledgeable of the types of assisted housing and the national and state requirements of each.
- Documentation indicates that the employee identifies regulatory agency oversights appropriately and passes agency inspections and audits (e.g., management reviews, physical inspections, file audits, occupancy audits) when responding to and remedying findings from agencies' inspections and audits.

Critical Work Function 5: PROPERTY PERFORMANCE MANAGEMENT

Key Activity 5.1

Identifies the reasons for property performance by analyzing operational and financial data in order to implement either best practices or corrective measures

- Documentation indicates that the employee has illustrated an understanding of operational and financial best practices through the process of accessing historical trends and benchmarks in the industry as well as market conditions and other performance indicators.
- Documentation indicates that the employee evaluates the property effectively by using site visit checklists, performing property audits, establishing and comparing audited properties to performance benchmarks, and identifying practices impacting overall property performance.
- Reports indicate that the employee understands forecasting methods when evaluating future financial performance of properties, using occupancy and the "Ps" of property (i.e., People, Product, Price, Promotion, Place).
- Documentation indicates that the employee evaluates and controls expense categories and identify options for optimizing property performance.

Key Activity 5.2

Ensures compliance with owner and managing agent responsibilities by reviewing management agreements in order to ensure legal compliance, maximum service and profitability of the property

- Documentation indicates that the management company complies with management agreement terms and conditions (e.g., Fair Housing, insurance, habitability, collections and disbursements, reporting).
- Records indicate that the employee adheres to owner objectives, owner representation as required in all negotiations, and communication requirements with all interested parties when evaluating property performance.
- Documentation reflects outside party involvement as necessary and appropriate.

Key Activity 5.3

Identifies significant key property performance indicators to evaluate and report property performance

- Reports indicates that the employee uses essential tools and software reporting capabilities and reports, such measures as occupancy performance, a resident satisfaction, and property maintenance performance standards, in the owner's required report format.



Skill Standards for Community Managers

Critical Work Function 1: MANAGING THE SALES PROCESS

Key Activities

Performance Indicators

Key Activity 1.1

Develop a comprehensive marketing plan

- The marketing plan describes the surrounding market (e.g., neighborhood, demographics, economic data, competition) and attributes of the property (e.g., strengths, drawbacks).
- The marketing plan details a well reasoned marketing strategy, including techniques (e.g., outreach, promotions), media (e.g., *Apartment Guide*, the Internet, newspaper), and production measurement tools.
- Regional and local markets, and strategies for positioning the property in relation to them.

Key Activity 1.2

Update the marketing plan by evaluating progress and making adjustments as necessary

- The marketing plan links findings to the owner's goals.
- The marketing plan includes statistics describing sources of traffic, traffic achieved, and closing ratios, methods, and reporting to quantify plan results and identify critical performance thresholds.
- The marketing plan specifies alternative and/or additional strategies.

Key Activity 1.3

Manage the sales team

- Interactions with sales team indicate knowledge of the leasing process.
- Interactions with sales team demonstrate knowledge of coaching and motivation.
- Sales team performance indicates positive results from coaching, motivation and leadership.

Key Activity 1.4

Maintain continuing product readiness

- Inspections of the marketing path indicate its cleanliness and good condition.
- Components of the marketing path illustrate the desirable features of the property.
- Inspection records indicate the marketing path is inspected on a daily basis.
- Inspections of property collateral and print media indicate accuracy, timeliness and professional appearance.

Key Activity 1.5

Ensure equitable treatment for all potential residents

- Documentation indicates compliance with applicable local, state and federal regulations that impact sales and marketing.
- Documentation indicates compliance with regulations that pertain to the disabled.
- Documentation indicates compliance with occupancy standards.
- Supervisory records indicate the use of professional judgment in interactions with and decisions concerning potential residents.



Critical Work Function 2: MANAGING RESIDENT RELATIONS

Key Activity 2.1

Present the company image to establish a positive reputation and encourage retention

- Documentation indicates compliance with company standards, policies and procedures.
- Documentation and inspection indicate compliance with prevailing standards for personal appearance and behavior.
- Documentation indicates that the community manager monitors the compliance of property staff with company standards, policies, and procedures and with prevailing standards for personal appearance and behavior.

Key Activity 2.2

Maintain consistent and ongoing communication with residents

- Records of communication indicate that the community manager adheres to applicable standards for business communication.
- Documentation indicates the use of appropriate and effective strategies for communicating with residents and other audiences.
- Documentation indicates that the Community Manager aligns the medium for communication to the message and its audience.

Key Activity 2.3

Create a positive resident service atmosphere

- Feedback from residents indicates that appropriate customer service principles prevail among all staff in communication, attitude and relationships with residents.
- Feedback from staff and other audiences indicates the community manager models positive resident service.
- Observation and documentation indicate the use of effective customer service principles and techniques.
- Observation and documentation indicate an understanding of resident expectations for service.
- Feedback from pertinent audiences indicates the Community Manager demonstrates emotional maturity and appropriate autonomy in decision making.

Key Activity 2.4

Resolve issues effectively

- Observation and documentation indicate the use of effective conflict resolution techniques.
- Documentation indicates that the Community Manager makes decisions independently within the bounds of his/her established authority.
- Feedback from residents indicates a satisfactory level of resident satisfaction and issue resolution.
- Records of communication indicate that vehicles for feedback have been regularly used to measure customer satisfaction levels.
- Documentation indicates that appropriate action on feedback has been taken.

Key Activity 2.5

Provide fair and equitable treatment for applicants and residents

- Documentation indicates compliance with local, state and federal Fair Housing laws and regulations.
- Documentation indicates compliance with the Americans with Disabilities Act (ADA).
- Documentation indicates the monitoring of complaints to identify potential trends or areas of concern.



Key Activity 2.6

Enforce company policy in a manner that is consistent with pertinent legal requirements

- Documentation indicates compliance with landlord/tenant laws and regulations.
- Contracts and related documents indicate compliance with laws pertaining to contracts.

Critical Work Function 3: MANAGING THE PHYSICAL PROPERTY

Key Activity 3.1

Conduct frequent and systematic inspections of the property

- Documentation shows that the Community Manager inspects the property on a frequent and systematic basis in order to identify issues related to regulatory compliance, risk and curb appeal.
- Documentation indicates understanding of lender and agency expectations for property condition.
- Documentation indicates understanding of factors related to risk management.
- Documentation indicates the application of effective loss prevention techniques.

Key Activity 3.2

Perform preventive maintenance

- The preventive maintenance program is reasonable, given the overall condition of building components and the owner's objectives for the property.
- Documentation indicates that the community manager monitors implementation of the preventive maintenance program.
- Documentation indicates appropriate decision making concerning repair and replacement.
- Documentation indicates prudent use of natural resources and energy.

Key Activity 3.3

Monitor the service request process

- Service request processes are documented and comprehensive, and in daily use.
- Documentation indicates that service requests are managed in accordance with the stated process with timely completion and follow up.
- Documentation indicates the effective tracking of employee productivity. Inventory management procedures include input from service request completion records.
- Documentation indicates the tracking of repeat calls and repair trends to identify potential component failures or employee performance issues.

Key Activity 3.4

Manage the apartment turnover process

- Apartment turnover processes are documented, comprehensive and consistent with industry standards.
- Apartment turnover processes are consistent with owner objectives and market demand for time and quality.
- Documentation indicates that apartment downtime is minimal.



Key Activity 3.5

Manage the use of contractors and vendors

- Documentation indicates that necessary repairs and improvements are evaluated on a cost-benefit basis and that vendors and contractors are selected appropriately.
- Documentation indicates that the Community Manager effectively determines the scope of work and contract requirements and manages the bid process and negotiations as required.
- Contracts with contractors meet the owner’s requirements and are consistent with legal requirements.
- Documentation indicates that the Community Manager monitors the performance of contractors effectively and maintains an appropriate professional relationship with contractors and vendors.

Critical Work Function 4: MANAGING PERSONNEL

Key Activity 4.1

Comply with employment regulations

- Documentation indicates compliance with pre-employment laws and regulations.
- Documentation indicates compliance with employment laws and regulations.
- Documentation indicates compliance with post-employment laws and regulations.

Key Activity 4.2

Recruit appropriately qualified applicants

- Job descriptions for all positions within the Community Manager’s purview are documented and communicate appropriate expectations.
- Documentation indicates the use of appropriate recruiting methods that are targeted toward appropriate sources of talent.
- Documentation indicates that interviews are conducted in a standardized fashion and consistent with applicable law and regulations.
- Documentation indicates that essential information about wages, benefits, and company requirements is communicated clearly and accurately in the recruitment process.
- Records indicate that interview guides focus on job skills and are related directly to criteria based on the job description.

Key Activity 4.3

Hire high-caliber employees

- Employment offer letters include all pertinent components.
- Documentation indicates that pre-employment requirements and regulations concerning such issues as drug testing, credit and background checks, and employment testing are satisfied.
- Documentation indicates appropriate and effective negotiation of wages and benefits.
- New hire paperwork is complete.

Key Activity 4.4

Orient new employees effectively

- Orientation materials and processes communicate job descriptions expectations and company benefits clearly and accurately.
- Orientation materials and processes communicate the culture and requirements of the company and key attributes of the community.
- The employee handbook is current, clear, and compliant with employment law and regulation.
- Documents indicate that new employees are oriented to their positions in an ordered and consistent fashion.



Key Activity 4.5

Train employees effectively

- Training materials teach to job descriptions and expectations effectively.
- Training materials communicate company policies and procedures clearly.
- Documentation indicates that training is appropriately individualized to employees.
- Observation indicates that informal training and daily skill building occur with staff.

Key Activity 4.6

Evaluate employee performance systematically

- Performance evaluation processes and tools are documented, linked appropriately to job descriptions and expectations, and compliant with pertinent laws and regulations.
- Performance evaluations are performed in an objective and consistent manner.
- Documentation of performance evaluations is complete, consistent with stated requirements, and informative for future performance evaluations.

Key Activity 4.7

Coach employees proactively

- Observation indicates that the community manager coaches employees effectively in order to improve their job performance.
- Documentation indicates that coaching is consistent with the learning requirements of employees.

Key Activity 4.8

Counsel employees with performance deficiencies to improve their performance

- Documentation indicates that constructive criticism, motivation strategies, and corrective actions are appropriate to identified performance deficiencies and are timely and consistent with pertinent laws and regulations.
- Documentation indicates that identified performance deficiencies are addressed related to job descriptions and expectations.

Key Activity 4.9

Terminate employment when required in accordance with company policy and pertinent law

- The termination process is documented and consistent with pertinent laws and regulations.
- Records show that each termination is documented fully.
- Documentation indicates that information about unemployment insurance and benefits continuation options is communicated clearly and in writing.

Key Activity 4.10

Maintain complete employment records

- Requirements for the maintenance of employment records as described in company documents are followed and consistent with pertinent laws and regulations.
- Employment records are well-organized, secure, and compliant with company and legal requirements.
- Documentation of health records is separate from non-health records.



Critical Work Function 5: MANAGING AND ANALYZING FINANCIAL PERFORMANCE

Key Activity 5.1

Analyze the financial operations of the property

- Reporting indicates that the appropriate application and interpretation of financial formulas and ratios (e.g., return on investment, gross potential rent, basic percent calculations, physical occupancy versus economic occupancy, capitalization rate).
- Reporting indicates ongoing attention to cash flow.
- Records indicate that the community manager monitors the impact of daily operations on the financial health of the property (e.g., traffic, turnover, purchasing, retention).
- Records indicate the regular comparison of financial performance to industry standards and company expectations as stated in the business plan.
- Documentation indicates that corrective action is taken for underperforming aspects of the property and that the corrective action is appropriate, monitored and timely.

Key Activity 5.2

Use strategies defined in the business plan to achieve the owner's investment goals

- Reporting indicates the Community Manager's commitment to the owner's objectives and the established business plan.
- Records indicate ongoing monitoring of performance relative to the budget and business plan.
- Documentation indicates the Community Manager's understanding of key variables: types of ownership, characteristics of investments, financing options and return on investment.
- Documentation indicates the use of appropriate operational software in making essential calculations, analyzing reports, forecasting and analyzing the effect of operational decisions on the financial health of the property.
- Records indicate clear and actionable variance descriptions along with suggested corrective actions.

Key Activity 5.3

Record financial activity using appropriate accounting principles and practices

- Financial records are consistent with generally accepted accounting principles.
- Financial records are consistent with the typical structure of financial statements, sensitive to the factors that influence financial statements (e.g., rent roll, general ledger, aged open receivables), and support decision making about operations.
- Financial records indicate adherence to accrual and/or cash accounting methods.
- Financial records indicate use of appropriate cash management techniques.



Key Activities

Performance Indicators

Key Activity 5.4

Maximize net operating income

- Documents indicate appropriate decision making to maintain a desirable level of net operating income (e.g., timing of changes in rent, steps to minimize expenses and losses) using available financial reporting.
- Financial records and observation indicate understanding of the key elements of net operating income and attention to their component value.

Key Activity 5.5

Report the property's performance honestly and accurately

- Audits indicate the Community Manager's adherence to prevailing ethical standards related to financial management and reporting.
- Audits indicate the Community Manager's adherence to generally accepted accounting principles.
- Financial records support analysis using key industry success metrics (e.g., economic occupancy, closing ratios, exposure).





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