**Note Taker:** Mary Sweeney

**Date:** Thursday, June 4, 2020-1:00–2:30EDT

**Session Name:** People Session: Property Operations Breakout

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| **1. Ideas Shared**  Very brief bullets on key ideas discussed. | * Pandemic is highlighting that communication between Staff and Residents is a key component to Property Management; organizations need to keep focusing on breaking down barriers. * Participants have been surprised by their successful transition to remote property management. Technology has been key for this remote work and orgs are looking to keep many of these changes long term:   + Minimize/distribute office space   + More usage of e-communications (Zoom/Slack) and virtual tools (Yardi Rent Café for Recertification/rent collections)   + Creating Buddy Properties to better support staggered staff   + Leveraging community volunteers and municipal support * Special concerns around Senior housing – isolation and technology adoption * Due to demand of affordable housing, virtual tours and leasing has worked well; will need to be more creative with market-rate units and addressing technology challenges with senior housing. * Demand for rental relief will be high with high unemployment; organizations will need to help residents now   + Looking to make rental relief a core fundraising component   + Increase occupancy, change requirements   + Reduce amount and timing of documentation required by residents (re-cert/applications) * Looking at 2021 budgets to address technology infrastructure needs and training   + Need to be sensitive to resident barriers to technology adoption (language, age) * Should review if any organization processes/practices are contributing to institutional racism (e.g. changing screening criteria, increasing women/minority-owned partners) |
| **2. Discussion**  Level of detail of the discussion to be captured will be based on the needs of the planning team for the session. | Jim Aliberti (LINC) shared that LINC mainly uses 3rd party property management companies; he is having discussions with them on how to help out and upgrade LINC’s legacy/aged properties (vs. new <3 year constructions) beyond just faucets and toilets. Especially looking at how to maintain contact with residents. When society is back to post-Covid19 semi-normalcy, LINC wants to remove as much barriers as they can between staff and residents as they see contact as a key component of successful property management Jim constantly reminds their for-profit managers that they are serving a community, and this needs to always be a top consideration.  Beyond cleanliness, LINC is working on how operations will return and move forward. They are implementing a phased process of returning – staff won’t be back until after July 4th, 20% first, then 50% in August with a 4 day week on/4 day week off rotation with 10 day gap between returns, will play it by ear through end of year. Questioning if large office space is necessary with their successful use of Zoom/Slack. Hoping operations will keep and build on the impactful changes and tweak as required.  Vicki McDonald (Foundations Community) contributed that she sees four main categories of impact: healthy/safety, rental collections, staff, and technology.  Health/Safety - Focusing on not only cleaning protocols but also a health initiatives program which is a system of support referrals for when someone is diagnosed with Covid and is quarantined (i.e. food, health). Have had 3000 volunteers make care calls who are really listening to residents and listening to what they need. This helps engage volunteers with the residents and help them understand who they are, breaking down barriers and changing minds. Going forward, want to keep all of this, build out more direct outreach, and support for resident health issues.  Rental Collections – They have cross-trained staff on what help they can give on rental assistance. Have also been fundraising with Facebook/email and raised $800K to help residents with rents. This is not new, previously fundraising focused on services, will be looking at consistent rental assistance fundraising efforts going forward.  Staffing – Concerned about coverage if all property staff got sick. Have set up “Buddy” properties – cross training of staff, sharing keys, staggered schedules– want to make sure staff from elsewhere can still get in and check on residents. This has worked really well, and is something they want to continue to do. Whoever though property staff could work remote, and is successful? Looking at formalizing a central leasing location with a virtual leasing model – this has currently been working well. Because of their long waiting list, don’t need to do the marketing. Expect remote working policies to remain robust, seeing a total shift of what’s possible there.  Technology – Weren’t prepared (i.e. did not have computer cameras). Microsoft Teams works great for most, but some staff still needed training, and of course residents. Currently polling staff to see who wants to come back – no one has said “yes” yet. Seeing holes with Internet access on properties; local school district issued devices to resident students, public transportation has parked buses with Wi-Fi so residents can access. 2021 budgeting will look for Wi-Fi holes and how to enhance and staff and resident training.  Michelle Hawley (Bellwether). Crises reitering the need for flexible on site staffing; will need to be resilient - anticipating additional crises and establishing solid contingency emergency plans. Never thought they could operate prop ops remotely, has been very successful so far – using staggered schedule, onsite/remote 50%/50%, technology has been a huge component to enable this, helps service residents and keep staff engaged. Leasing – some managers have embraced YouTube/video tours, surprised by success of virtual leasing. Conducting appointments remotely (Skype/email), some success and challenges. ESL language barriers more challenging on phone/video. Trying to strike the balance between reducing barriers without causing new barriers using technology. Special challenges with senior (62+) buildings, neither have access nor are comfortable with technology.  Lisa Wilcox Erhardt (The Community Builders): Have been using Yardi Rent Café – has built in many different languages for recertificates, not just Spanish/traditional options. Was a “beast” to roll out but is working well. Need to get out of your own way and get it down, don’t aim for perfection. Dan Montgomery (REACH) shared that they are also looking at this. Michelle mentioned that Bellwether is also moving from eSite to Yardi. Had originally pushed out Rent Café, but became apparent the need to make that a higher priority. Ability to communicate with residents often and easily is a high priority. Richard Kingston (HPN Select)brought up that RealPage has a similar technology, as does MRI, Boston Post.  Lisa shared that as takeaways from recent events, organizations should look at all their procedures, processes and ways they do business; what is perpetuating institutional racism? Review screening for occupancy, security deposits, lack of housing for larger families/groups. TCB also surprised that property management can be done remotely, though some better initiatives are working better than others. Currently staffing skeleton crews, getting ready for next phase to bring back staff.  Similar to Bellwether, TCB is finding virtual tours working for affordable housing since that type of housing is so much in demand. Their more market rate/mixed income does not have the same demand, so will need to be more creative with those (YouTube/cell phones tours). Seniors are very reluctant to lease a unit they can’t see, so there are both challenges and opportunities here. The use of online applications/recertifications has been is incredible. Organization should look to see where they can approve other efficiencies for both site teams and residents. Ask if requirement is org driven (so could be reduced) or program? More effective for site teams or residents. Is possible to do a 1-year re-cert then not for next 2 years?  A big difference was to make personal connection. Rent Café is pushing residents pay online, seeing an 8% increase in usage. Maintenance work orders also online, much more email/text communication with staff – working well with daily check-ins that facilitate conversations and builds trust. Used to not have Facebook group, now allow them, get creative things done. Internet across portfolio needs improvement going forward as expecting residents to move to more online.  TCB is looking at their partner relationships and paying attention there – working with more women/minority owned businesses. In their upcoming strategic plans, setting parameters in property management so that x% will be women/minority owned business. Weren’t tracking well previously - need to set goals in place so there is something to strive for.  Vicki mentioned that they are looking at criminal behavior, modify, make them more relaxed. 10 years without convictions down to 7, depending on the Class of misdemeanor, adjusted over last year. No pattern, successful resident doesn’t subscribe/align to their criminal history, no relationship as how they were going to perform as a resident – why are we doing this, prohibiting people from housing?  Lisa shared that for their subsidiary programing, there is a strong need to reduce the paperwork requirements. Burden on residents to prove out everything, if they are moving year to year; don’t have access to all their paperwork (e.g. bank account statement). Organizations should think about why these required, and only ask for those are absolutely necessary. Should also consider not requiring this to be every year.  Jim brought up that with the high unemployment levels, they are anticipating overcrowding – organizations should foresee this need and possible allow more occupants (LINCs private property managers were horrified by the thought). Can that extra person not be part of family? If so, do they get put on the lease? Are they qualified?  Lisa shared her experience with a terrific tenant who lost job due to Covid. Made the decision to couch shop until he knew what his employment situation, didn’t want to get behind rent, would be challenged to pay the back rent. Finding more rental resources is critical to get in front of residents.  Vicki stated that while they had a good solid emergency action plan, but didn’t factor in how long something like the current Covid pandemic would last. Need to revise and build in longevity, not sure how to address this, doesn’t fit in the box. Staff now will take very seriously the emergency plans, not just an exercise.  Michelle offered that organizations should look at their portfolios and evaluate sensitivity on financial side. What happens with high rent delinquency? Should run a sensitivity analysis on overall portfolio, and look at reserves. How long to withstand, prioritize projects or delaying capital projects. Expect financial impacts will be part of contingency plans going forward.  Lisa shared that organizations should anticipate that recovery will delay how quickly organizations can get back to 100%, and that unanticipated resources were spent during shut down. Other comments included considerations of disruptions in supply chains, get orders in sooner than later, and be able to support long-term stress.  Vicki shared that they are shifting on their leasing office ideas and creating a safe space that residents and staff feel comfortable – will consider flow and how folks will do their work. Any retrofits for contactless initiatives will be built into capital improvements, as well as Wi-Fi upgrades and build outs. Will be teaching residents how to be more self-sufficient i.e. change filters, do some of their own work. Jim shared that privacy factors need to be considered. All groups need to be on same page, make this a collaborative effort with residents. Have strong concerns with Senior properties especially the isolation factor and technology challenges. Mentioned Casinos are promoting a 1-year decontamination process (anti-microbial surfaces/finishes).  Lisa closed with how do we make this a movement, not a moment? View housing as an impetus to make change happen, this is within us, so we can push it out. |
| **3. Next Steps and Follow-up Tasks**   * Identify next steps * Follow-up tasks:   + Members   + HPN staff |  |
| **4. Future Peer Exchange Topics**   * Future session ideas * Further peer exchange (webinars, MemberExchange, etc.) | Continuing conversations on institutional racial justice and how property operations can make positive changes |