

**SOHCO
ROLE PROFILE
2020**

JOB TITLE: Tenant Liaison Officer

REPORTING LINE: General Manager or Portfolio Manager

JOB LEVEL: TBD

ROLE PURPOSE

- To oversee the management of the building complex, including management of relationships with tenants, rental collection, leasing of units, and management of service providers and maintenance of the building.

ROLE DELIVERABLES

Key Performance Areas:

1. Marketing
2. Pre take on assessment
3. Take on, handover and record keeping
4. Accounts
5. Health and safety
6. Debt collection
7. Tenant relationships
8. Management of service providers
9. Welfare advice and support
10. Reporting

QUALIFICATIONS AND EXPERIENCE REQUIRED

- Grade 12 education
- Relevant qualification in built environment, ie building/property management
- 2 years building management, property management and tenant liaison experience
- 3 years administration experience
- Basic accounting knowledge and experience
- Computer literacy is essential.

Key Performance Areas	Activities	Key Performance Indicators
1. Marketing	<ul style="list-style-type: none"> • Engage in marketing activities by participating in formal and informal networking activities • Ensure that signage on site is visible • Furnish prospective tenants with product service offerings and required documentation criteria (product and services brochures/pamphlets) • Maintain an up to date waiting list of approved tenants 	<ul style="list-style-type: none"> • Marketing activities aligned with overall SOHCO strategy • Marketing activities ensure optimal occupancy levels • Signage is visible and well kept
2. Pre “Take On” Assessment	<ul style="list-style-type: none"> • Assist new applicants in completing all forms and documentation • Receive, sort and review application forms from prospective tenants • Assess whether pre-qualification criteria are met and source additional information if required • Complete credit checks and rate applications that have been through credit vetting process • Conduct first and second interviews to assess suitability and financial standing of applicants • Complete affordability assessment with tenants • Verify that all details and documents required have been included • Call qualifying tenants and advise that their application has been approved • Call non- qualifying tenants and advise that their application has not been approved 	<ul style="list-style-type: none"> • Enquiry/applicant database compiled and constantly updated • Outcomes communicated • Application forms are captured and recorded correctly
3. “Take On”, handover and Record Keeping	<ul style="list-style-type: none"> • Generate and process qualifying tenants’ lease agreements and ensure that leases are signed • Complete all documents in leasing pack • Explain the conditions of the lease to new tenants • Conduct tenant training 	<ul style="list-style-type: none"> • Leases in place and meet the legal requirements • Qualifying tenants are aware of the requirements of the lease • Tenant data updated on the Novtel system

Key Performance Areas	Activities	Key Performance Indicators
	<ul style="list-style-type: none"> • Brief new tenant on council requirements and on deposit requirements • Enter new applicants and occupants details on the Novtel system (create new tenant) • Input leasing data onto the Novtel system <ul style="list-style-type: none"> - Create contract - Raise deposit • Open a file for each new tenant recording name, unit number and date and keep information updated • Generate information update letters and ensure distribution to tenants • Scan and upload all documentation to Shared drive and Novtel Relations • Oversee the handover process to new tenants, ensuring that all relevant documentation is complete and forms are signed • Inspect units prior to the tenant taking occupation • Show new tenant/s around the unit and complete a handover checklist together with the tenant (snag check) • Discuss house rules with new tenants ensuring that the tenant fully understands the conditions • Welcome and formally induct new tenants • Generate “happy letter” 	<ul style="list-style-type: none"> • Leases are filed to facilitate easy access • Oversee the handover process to new tenants, ensuring that all documentation is complete and forms are signed • Inspect units prior to the tenant taking occupation • Provide a snag list to tenant informing them that faults must be reported within seven (7) days • Show new tenant/s around the unit and complete a handover checklist together with the tenant • Welcome and formally induct new tenants • Discuss house rules with new tenants ensuring that the tenant fully understands the conditions
<p>4. Accounts</p>	<p>Rental Statements</p> <ul style="list-style-type: none"> • Open accounts for new tenants on Novtel system and capture deposit payment (receipt and allocate) • Ensure new tenants are on Debit Order • Ensure monthly debit orders are uploaded • Issue a receipt for the deposit and the first months rental invoice • Balance invoice batches • Perform monthly invoicing - “recurring billing” process on Novtel • Generate and print monthly statements for each Sohco unit by the 15th of each month 	<ul style="list-style-type: none"> • Monthly statements for each unit printed by 15th of month • Print final notes by 4th of month • Receipts made out timeously • Debit order sent on correct date • Rejections dealt with according to policy • Download bank statements daily • Deposit refunds paid to exiting tenants • Daily and monthly age analysis submitted • Overdue accounts are blocked

Key Performance Areas	Activities	Key Performance Indicators
	<ul style="list-style-type: none"> • Generate final notices on Novtel by the 4th of every month <p>Rental Payments</p> <ul style="list-style-type: none"> • Send debit orders on the 15,25,30/31 of each month and receipt payments • Advise tenants to pay in cash, after 3 rejections or obtain new debit order details • Download bank statements from FNB daily • Identify where payments are to be allocated and query “unknown” deposits • Receipt and capture all payments received • Generate “unidentified deposit notices” for posting on site office door • Remove rejections from the list of amounts paid • Generate daily ageing report by 10am everyday • Prepare and submit daily and monthly age summaries to manager, head office and attorneys where required • Process the necessary refund of deposits <p>Cashbook</p> <ul style="list-style-type: none"> • Print cashbook and update printouts • Complete journal entries • Reconcile bank statements with payments received <p>Municipal Accounts</p> <ul style="list-style-type: none"> • Obtain a printout of utility accounts • Scrutinise the list and delete closed accounts • Reconcile utility accounts to data on the Novtel and Excel systems • Arrange for utilities bill to be paid by the Finance Department at head office • Monitor any historical accounts directly between tenant and municipality every 3 months, flag arrears accounts for action • Highlight unreconciled accounts and high amounts, to manager • Capture overdue accounts and forward to municipality for blocking 	<ul style="list-style-type: none"> • Disconnection forms submitted to municipality by the 25th of the month • Disconnection forms filed

Key Performance Areas	Activities	Key Performance Indicators
	<ul style="list-style-type: none"> • Closing off and transferring ex tenants water accounts with the municipality where applicable • All new tenants' water accounts to be opened in Sohco's name • File forms on tenant files and Relations 	
5. Health and Safety	<ul style="list-style-type: none"> • Perform internal health & safety inspection regularly • Coordinate external health and safety inspection • Issue work to contractors to resolve health and safety issues identified • Follow regulations set by government from time to time as they relate to health issues 	<ul style="list-style-type: none"> • Fire safety requirements met • Health and safety issues resolved timely • Work issued out and ensure completion of work.
6. Debt Collection	<ul style="list-style-type: none"> • Manage the rental collection process through: <ul style="list-style-type: none"> - Distributing rental statements - Reviewing the arrears report - Following up on tenants that are in arrears - Distributing arrears letters and final notices • Implementing credit control procedures through: <ul style="list-style-type: none"> - Calling of tenants who have not paid by the 6th of each month - Visiting tenants who are more than 1 month in arrears - Reporting on age analysis to the Manager • Inspecting all arrear rental units weekly to ensure tenants have not absconded • Identify tenants in arrears for handover to attorney for legal collection and eviction process • Liaise with attorney and track progress while continuing collection initiatives 	<ul style="list-style-type: none"> • Targeted vacancy levels achieved • Targeted arrears levels achieved • Credit control procedures implemented: action plan in place • Last resort legal action and eviction proceedings completed efficiently

Key Performance Areas	Activities	Key Performance Indicators
7. Tenant Relationships	<ul style="list-style-type: none"> • Establish tenant focus group • Communicate with and support tenant focus groups • Deal with complaints between parties and facilitate an amicable resolution • Monitor and report any illegal businesses operating on the premises • Network and establish contacts with social workers and welfare agencies, for use by tenants • Manage tenant relationships 	<ul style="list-style-type: none"> • Tenant focus groups established and supported • Conflict dealt with in affirm, but fair manner • Good and clear communication channel created and maintained with tenants
8. Management of Service Providers - Maintenance - Cleaning - Refuse collection - Security - Garden Services - etc	<ul style="list-style-type: none"> • Monitor the condition of the building through regular inspections and report areas requiring attention • Ensure that tenants are briefed on their maintenance responsibilities • Ensure that the maintenance services providers are on Sohco supplier database, as per process and procedure • Liaise with the maintenance service providers as required to attend to common area maintenance and unit repairs • Ensure the completion of repair work against the required standards and within the required timeframe • Liaise with garden service provider on garden maintenance issues and ensure resolution of issues • Monitor refuse collection services and address matters of concern • Monitor security contractors and report incidents • Hold monthly meetings and feedback sessions with all Service Providers • Report security and maintenance incidents to manager • Carry out maintenance inspections of units and submit report on feedback • Input and track maintenance issues on the Novtel system 	<ul style="list-style-type: none"> • Common areas and grounds inspected regularly (x times per day/per week) • Maintenance inspections of units completed annually • Complex is neat and tidy at all times • Building appropriately maintained, with unit maintenance completed with agreed turnaround times • Security and maintenance incidents reported immediately • Regular meetings with SP's convened • Novtel maintenance process followed with respect to Work Orders • Sohco maintenance work inspection and payment process completed every time

Key Performance Areas	Activities	Key Performance Indicators
	<ul style="list-style-type: none"> • Generate Work Orders and issue to contractors • Close off Work Orders after work complete to Sohco standards and satisfaction • Sign off Work Orders and submit for payment processing 	
9. Welfare Advice and Support	<ul style="list-style-type: none"> • Network and establish contacts with social workers and welfare agencies 	<ul style="list-style-type: none"> • Welfare referrals provided where appropriate
10. Reporting	<ul style="list-style-type: none"> • Produce reports covering vacancies, proposed evictions, absconders, waiting lists, maintenance, cleaning and security issues 	<ul style="list-style-type: none"> • Reports generated weekly, monthly and quarterly as/when required

TLO - OPTION A

Basic Salary	14 900.00
Company Pension Contribution	1 862.50
Medical Aid Contribution	1 681.00
SDL	149.00
UIF	148.72
Cost to Company	<u>18 741.22</u>

TLO - OPTION B

Basic Salary	11807.37
Company Pension Contribution	1475.92
	1
Medical Aid Contribution	681.00
SDL	118.07
UIF	148.72
Cost to Company	<u>15231.08</u>

ROLE REQUIREMENTS

GENERIC SKILLS:

- Communication (Advanced)
- Facilitation (Advanced)
- Conflict Management (Advanced)
- Customer Service
- Relationship Management (Advanced)
- Teamwork

TECHNICAL KNOWLEDGE AND SKILLS

- Eviction Management (Basic)
- Lease agreement management (Basic)
- Maintenance Planning
- Occupational Health and Safety (Basic)
- Accounting and reconciliation skills
- Numeric skills
- Excel skills
- Pastel skills
- Novtel skills

MANAGEMENT AND LEADERSHIP SKILLS

- Project Management (Basic)
- Planning and organising (Basic)
- Problem Solving (Basic)
- Gather and Analysing Information (Basic)
- Networking (Basic)

ATTRIBUTES

- Emotional control
- Persuasion
- Assertiveness
- Interpersonal Skills
- Attention to detail
- Adaptability and Flexibility
- Situational sensitivity