

1. Position No. 22232, 22229, 80075, 22228, 22233, 22185, 22195, 80359, 80155	2. Descriptive Working Title Property Portfolio Assistant		3. Present Classification Clerk IV
4. Department Property Portfolio Mgmt - LMDM	5. Branch/section Operations	6. Proposed classification	Date Revised Aug 2019
7. Position No. of Supervisor 22147, 80347, 22209, 22211, 22121, 22242, 22174, 22031, 22016	8. Descriptive Work Title of Supervisor Property Portfolio Manager		9. Classification of Supervisor AO IV
10. Job Summary:			

Under general supervision, the Property Portfolio Assistant reports to a Property Portfolio Manager in the Regional Office which is responsible for all business conducted regarding tenants and housing stock within the Regional boundaries. The duties of the Property Portfolio Assistant include the initial set-up of tenant records with accurately documented rents, subsidies, services and the ongoing maintenance of the files using established protocols and BC Housing's systems and databases. Working collaboratively in a team setting the Property Portfolio Assistant provides direct support to tenants and Property Portfolio Managers (PPMs) regarding all associated programs, products and services including rent calculations, annual reviews, the scheduling and maintenance processes of housing stock and other services. While reviewing and monitoring tenant and housing records, the Property Portfolio Assistant analyzes and interprets information to ensure accuracy and initiates corrective action when necessary. As required the Property Portfolio Assistant will complete the tenancy interview and sign-up in the absence or in conjunction with the Property Portfolio Manager.

The Property Portfolio Assistant is required to work on site as well as in an office environment.

11. Duties:
-------------

**Provides administrative support to the Property Portfolio Managers for the Directly Managed and Group Home portfolios:**

- Prepares accurate rent calculations, subsidies, adjustments and annual reviews by analyzing and interpreting financial documents and initiate investigations when required
- Reviews and interprets tenant information to ensure accuracy and compliance regarding tenancy accounts, family composition, Declaration of Income and Assets, etc.
- Schedules and maintains appropriate follow-up methods to ensure operational procedures are completed in a timely and accurate manner, and initiate corrective action as required. This includes but is not limited to short-term rent adjustments, operational reviews and inspections, current month expiries, etc.
- Enters work orders into system to initiate projects with contractors
- Prepares accurate and effective communication documents according to guidelines using data from various sources as required
- Initiates and maintain appropriate processes regarding tenant accounts including but not limited to payments, arrears, annual rent review, PARP, NSF payments, etc.
- Completes tenant interview and sign-up in the absence or in conjunction with the Property Portfolio Manager
- Initiates and maintain the appropriate systems and documentation to ensure tenants receive services in a timely manner (i.e. Laundry SmartCards)
- Maintains BC Housing's standard filing systems

**Provides clerical administrative support for rent collection and lease administration:**

- Complete tenant interview and sign up in absence of Property Portfolio Manager
- Process NSF and returned PARP reports, notifying Property Portfolio Managers, caretakers and verifying information
- Prepare and obtain appropriate approvals and post reversal for service charges
- Prepare arrears reports and complete notices to end tenancy for submission to Property Portfolio Managers
- Check current month expiry report, review files and tenancy account and ensure tenant compliance
- Ensure follow-up and compliance on short term rent adjustments expiries
- Monitor audit arrears and chargeback payments
- Verifying tenancy account credit balances from arrears credit report, prepare refund documents and letters
- Posting credit repayments

Performs other related duties which do not affect the nature and scope of the work.

## STAFFING CRITERIA

BCGEU

1. Position No. 22232, 22229, 80075, 22228, 22233, 22185, 22195, 80359, 80155	2. Descriptive Working Title Property Portfolio Assistant	3. Present Classification Clerk IV
4. Education, Training and Experience		

High school graduation plus completion of a number of post-secondary courses in a relevant field such as business or program administration

Minimum three years related progressively more responsible experience in a comparable environment

Experience in management of residential properties, an asset

Or an equivalent combination of education and experience acceptable to the employer may be considered

5. Knowledge and Skills		
-------------------------	--	--

**Core Competencies:**

- Personal Effectiveness
  - Communication
  - Results Oriented
  - Teamwork
  - Service Oriented
- 
- Excellent knowledge of office systems and operating procedures and systems
  - Knowledge of non-profit societies and familiarity with applicable legislation (Residential Tenancy Act, etc.) is an asset
  - Proficiency with MS Office (Word, Outlook, Excel)
    - Proficiency with Word 2007 with higher intermediate to advanced functions
    - Good knowledge of Outlook 2007
    - Experience with using spreadsheets, especially Excel 2007
  - Good keyboarding skills with minimum of 50 wpm keyboard speed
  - Strong mathematical and analytical skills
  - Excellent communication, teamwork and interpersonal skills
  - Ability to work collaboratively
  - Ability to work in a fast paced and frequently changing environment
  - Ability to investigate and solve problems creatively and within established regulations
  - Demonstrated initiative and ability to work independently with limited supervision
  - Proven ability to organize multiple responsibilities simultaneously while ensuring accuracy and timely completion of each
  - Demonstrated ability to interpret and understand financial documents received from tenants
  - Ability to exercise good judgement
  - Demonstrated aptitude for learning computer applications quickly
  - Demonstrated ability to organize work and priorities and to maintain multiple priorities simultaneously

6. Occupational Certification:		
--------------------------------	--	--

## ADMINISTRATIVE SUPPORT TASK LIST

### PROPERTY PORTFOLIO ASSISTANT

The incumbent provides administrative support to Property Portfolio Managers (PPM) for directly managed, group homes, non-profit and co-op housing portfolios.

### PORTFOLIO SUPPORT

- Provides Portfolio support to assigned Property Portfolio Managers for the directly managed, group home, non-profit and co-op-housing portfolios;
- Participates as a member of a team to anticipate requirements and respond to requests;
- Works with the PPM on the annual budget process for the assigned portfolios;
- Organizes and maintains a schedule of non-profit operational reviews, PRHC group home inspections, and suite inspections;
- Prepares documentation for Residential Tenancy Office (RTO) actions and renewal of Tenant Income and Asset declarations
- Provides guidance and direction to Non-Profit Societies in the correct procedures for rent calculation, core need determination, tenant documentation and annual subsidy renewals,
- Ensures that the above reviews and inspections are tracked for completion
- Organizes and maintains a schedule for the Directly Managed Market House portfolio appraisals and rent reviews
- Ensures appropriate follow-up on non-profit operational review action plans by maintaining a tracking and Bring Forward system and sending reminders as required;
- Solves problems on routine calls and inquiries from tenants, group home operators and non-profits (rent, debts, payment status, pets);
- Conducts interviews with clients and assists with completion of forms for various programs;
- Reviews files and prepares documentation for PPM review and signature for final warning letters, RTB case preparation, etc.;
- Supports the PPM in the development of first-time operating budgets for new housing developments, including tracking key milestones;
- Liaises with Development Services staff and Corporate Communications to ensure information on status is up to date and participates in event planning;

### ADMINISTRATIVE SUPPORT

Provides administrative support to Property Portfolio Managers:

- Drafts correspondence, including confidential correspondence
- Manipulates or combines data from various sources to produce records and reports;
- Researches file, data or other information for PPMs;
- Establishes and maintains tracking systems;
- Maintains tenant and society files for the PPMs assigned and establishes and maintains filing system for issues and projects etc.;
- Produces mail merges and database reports;
- Provides computer based support services;
- Provides other administrative support such as arranging meetings, preparing agendas, copying, faxing etc.

**RENT CALCULATION:** Responsible for all rent calculations and associated duties.

- Review and ensure accuracy of rent calculations prepared by other staff such as PPMs, site reps and Non-profits;
- Confirm validity of income documentation on all rent calculations, changes and annual reviews;
- Monitor declaration information and refer suspicious declarations for internal audit
- Process annual reviews in a timely manner
- Oversee the monthly expiry report, reviewing files and tenancy account and ensuring tenant compliance and initiates corrective action as required;
- Ensures follow-up on short term rent adjustment expiries
- Update tenant files with family composition changes, transfers and Declaration of Income and Assets and batch rent as required
- Prepare and process adjustments and corrections to tenancy rent accounts

- Calculate and approve rent subsidies
- Complete tenant interviews and sign-up sessions in the absence of or in conjunction with the Property Portfolio Manager
- Maintain monthly expiry report, review files and tenancy account and ensure tenant compliance;
- Ensure follow-up on expiring short-term rent adjustments
- Explain Pre-Authorized Rent Payment option to applicants, tenants and societies
- Prepare and process adjustments or corrections to tenancy rent accounts;
- Process NSF and returned PARP reports, notifying Property Portfolio Managers, caretakers and verifying information, preparing and obtaining appropriate approvals
- Prepares arrears reports and completes notices to end tenancy; confirming any required changes and distributing to individuals serving the notices;
- Monitors audit arrears and chargeback payments and prepares report for Regional Manager;
- Verifies tenancy account credit balances from arrears credit report, prepares refund documents and letters and completes credit repayments;
- Identify overhoused situations, working with PPM to ensure transfer requests are completed or Notice to end tenancies are served
- Prepares and distributes letters to tenants for annual Declaration of Income and Assets;

#### **APPLICANT REGISTRY AND SELECTION – Vancouver Island Region; Northern Region, Interior Region**

- Provides accurate information relating to qualifications for housing and allocation of vacancies per BC Housing policy and procedures
- Analyzes client needs for housing, coding and assigns point scores
- Provides information or referral to other agency that can assist client
- Determines eligibility of Applications for Accommodations by applying the National Occupancy Standards, Core Need Income Thresholds and residency requirements
- Verifies information and follow-up for completeness
- Updates and re-prioritizes applicants as changes are received
- Liaises with other government agencies, housing registries and advocate groups to resolve housing issues for mutual clients
- Ensures clients with Mental Illnesses are given appropriate direction on housing, and are interviewed and assessed Health Services Consultants
- Provide information regarding the differences in rights and responsibilities between BC Housing, non-profit, cooperative and private market rent subsidized units.
- Receives and records vacancies
- Reviews highest need file for appropriate applicant
- Contacts applicant with offer and explains details of particular housing program
- Performs screening process including credit checks and landlord references
- Arranges for viewing of unit
- Maintains follow up file for offers, confirms tenancy and updates computer system

Performs other related duties that do not affect the nature and scope of the work, including support other administrative functions within the office and covering for other positions as required.