

Property Management/Operations Assistant (PMOA)

30-60-90 Day Milestone Checklist

This is a guideline and can be adjusted based on your specific role and discussions with the CEO.

Overall Goal: Become a valuable and integrated member of the CoHomes Boutique Senior Living team, contributing to resident well-being, successful operations, and a positive company environment.

30 Days (Focus: Foundation & Integration)

- **Resident Relations & Sales (70%):** Meet and build rapport with residents, families, caregivers, and service providers. Shadow existing staff on resident tours and application processing. Begin attending resident events (at least 1 per month).
- **Content Creation, Communication, Documentation, & Training (60%):** Complete CRM training and begin maintaining accurate online documentation. Participate in weekly meetings with the CEO to discuss resident concerns and operational challenges. Start capturing resident activities (photos/videos) for social media.
- **Property Operations & Maintenance (50%):** Create a spreadsheet to track and share the status of Operations & Maintenance Tasks. Learn the weekly food preparation and grocery sourcing routine. Familiarize yourself with cleaning protocols and resident areas (hallways, living room, etc.). Understand how to conduct visual security checks and report any concerns.
- **Additional Responsibilities (100%):** Attend all mandatory property management and company-related events (as assigned). Communicate any issues or concerns to the team for a collaborative solution.

60 Days (Focus: Proficiency & Contribution)

- **Resident Relations & Sales (80%):** Independently conduct tours for prospective residents. Assist with processing resident applications and lease agreements (as needed). Contribute to filling vacant beds within the designated timeframe (discuss specifics with CEO).
- **Content Creation, Communication, Documentation, & Training (70%):** Submit your first written report on property operations, resident observations, and maintenance requests. Refine your skills in capturing resident activities for social media content.

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- **Property Operations & Maintenance (80%):** Become proficient in creating weekly food menus and sourcing groceries within budget. Develop and implement strategies to minimize food waste. Master the cleaning routine for assigned areas (hallways, living room, etc.). Conduct independent visual security checks and report any concerns. Take responsibility for spraying baseboards and maintaining a clean kitchen environment. Assist with updating and maintaining the resident personal supply inventory system (created in month 1).
- **Additional Responsibilities (100%):** Proactively suggest improvements to workflow, company environment, and work-life balance.

90 Days (Focus: Mastery & Leadership)

- **Resident Relations & Sales (90%):** Build strong relationships with residents, families, and caregivers, consistently exceeding expectations. Play a key role in attracting new residents and contributing to high occupancy rates.
- **Content Creation, Communication, Documentation, & Training (90%):** Deliver high-quality written reports on property operations, resident well-being, and maintenance needs. Actively contribute to maintaining accurate and complete online documentation through the CRM system.
- **Property Operations & Maintenance (90%):** Independently manage and maintain the food preparation process (menu, budget, grocery sourcing, and waste reduction). Develop a system for inspecting furniture, kitchenware, linens, etc., and report any replacements needed. Oversee the cleaning and organization of assigned areas, ensuring a high standard of care. Manage and maintain the resident personal supply inventory system. Conduct independent monthly inspections for pest control and report any issues.
- **Additional Responsibilities (100%):** Share your career goals with the CEO and actively seek guidance and support for professional development. Become a reliable and trusted member of the team, fostering a positive and collaborative work environment.

Remember: This is a framework, and specific details and expectations may be adjusted based on your role and discussions with the CEO. Communicate openly, ask questions, and strive for continuous improvement in your role as a PMOA at CoHomes.

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