

# PM Training Manual

# SOBERHOMES

## PROPERTY MANAGER TRAINING MANUAL

**Version 5.1 — February 2026**

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## INTRODUCTION — Role Clarity & Time Expectations

- Hours budget (7–10/week), what counts as paid duties vs. Member duties, and how to think about “small-but-critical” daily tasks.

## SECTION I — Role Purpose & Authority

- Purpose of the position, operational focus, and clear boundaries (what you may do vs. may not do).

## SECTION II — Daily Time Tracking & Compensation

- Daily Google Form time tracking, monthly processing on the 1st, payment within 7 days.

## SECTION III — Weekly Reporting & Recurring Director Call

- Weekly email report requirements, delivery timing (Mon/Tues), and standing agenda for the 10–30 minute weekly status call.

## SECTION IV — Technology Stack

- Required systems access and use, including onboarding actions the Housing Director must provision:

## SECTION V — Financial Monitoring & Rent Enforcement

- Daily payment proof collection, end-of-month proactive rent culture, 5th-day late fee + warning process, and 10th-day escalation.

## **SECTION VI — Move-Out Administration & Billing Control**

- 30-day notice workflow, required move-out emails, billing stop controls, final invoice coordination, and same-day technology removal for safety.

## **SECTION VII — Drug Testing & Relapse Response (Operational)**

- Issuing tests, documenting results, reporting positives/refusals, and escalation pathways (including documentation standards).

## **SECTION VIII — Weekly White Glove Inspection (Post-Double Scrub)**

- One-hour weekly inspection scope (units + exterior), safety/security checks, cleanliness/organization verification, and corrective action workflow.

## **SECTION IX — Storage & “Intuitive Cleaning” Systems**

- Labeled, restock-friendly storage room design; inventory visibility; and how to trigger storage organization as a Double Scrub task.

## **SECTION X — Intake & Turnover Support**

- Intake/orientation support, technology onboarding, move-out smoothness, room readiness, and turnover as a high-risk operational moment.

## **SECTION XI — Governing Documents & Forms (Reference Library)**

- The documents that guide rules, enforcement, and workflows (excluding Operations Manual), and when to use each.

## **SECTION XII — Forms the Property Manager Completes or Initiates**

- The specific forms and communications the PM must complete, issue, forward, archive, and report.

# INTRODUCTION — ROLE CLARITY & TIME EXPECTATIONS

- **Budgeted time: 7–10 hours per week**
  - Approximately **1 to 1.5 hours per day on average**
- These duties are **separate from Member responsibilities** and **separate from volunteer/elected roles**.

## **Not included in paid job duties (these are Member responsibilities):**

- Stand-up meetings (required of all Members)
- Weekly house meetings (required of all Members)
- Housekeeping duties and chore participation (required of all Members)
- Counseling, sponsoring, or emotional support of peers (optional personally, but not job duties)

## **Your paid role is operational.** Your job is to:

- Observe
- Document
- Report
- Verify
- Escalate

## **Time allocation reality:**

- Most work is small but critical (5 minutes here, 10 minutes there) — completed consistently.
- Full-hour blocks are usually limited to:

- White Glove inspection
  - Intake/orientation
  - Turnover coordination
  - Termination-level incident documentation
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# SECTION I — ROLE PURPOSE & AUTHORITY

## Governance Framework

Authority resides in the License Agreement and governing documents—not in the individual serving as Property Manager. SoberHomes operates under a distributed leadership model. **All Licensees—including the Property Manager and any compensated or volunteer leadership roles—are bound by the same License Agreement and shared standards as every Member.**

Distributed leadership means that **each Member is responsible for upholding standards**, while defined roles ensure documentation, consistency, and proper escalation—not personal control.

### 1.1 Purpose of the Role

- Maintain a safe, sober, structured environment by ensuring:
  - Policy compliance
  - Accurate documentation and reporting
  - Facility readiness and safety verification
  - Financial discipline through monitoring and required notices
  - Escalation of decisions beyond your authority to the Housing Director

### 1.2 Authority Boundaries

#### You MAY:

- Document violations and incidents.
- Issue and document drug tests (per protocol).
- Monitor and document curfew-related evidence (lock / camera / Life360).
- Send and archive formal communications in the House Google Group.
- Run delinquency checks and issue required notices.

- Support intake and orientation logistics.
- Coordinate turnover readiness tasks (room readiness, tech removal).
- Escalate cases likely leading to termination.

**You MAY NOT:**

- Forgive rent or waive late fees.
  - Modify the License Agreement or promise exceptions.
  - Write off bad debt.
  - Make unilateral termination decisions (except immediate safety emergencies).
  - Disable security systems or share master access codes.
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# SECTION II — DAILY TIME TRACKING & COMPENSATION

## 2.1 Daily Time Tracking (Required)

- Hours must be tracked **daily** using the **Property Manager Time Tracking Google Form**.
- Each entry includes:
  - Date
  - Task category
  - Brief description
  - Minutes spent

## 2.2 Monthly Processing

- Monthly totals are processed on the **1st** of each month for the **preceding month**.
  - Payment is made within **7 calendar days**.
  - Missing or incomplete daily submissions may delay payment.
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# SECTION III — WEEKLY REPORTING & RECURRING DIRECTOR CALL

## 3.1 Weekly Report Email (Required)

- A weekly report email must be sent to the Housing Director **before** the recurring weekly property status call.
- Preferred timing:
  - **Monday or Tuesday**
- The weekly report is the written record; do not rely on verbal-only updates.

## 3.2 Weekly Property Status Call

- Recurring call duration: **10–30 minutes**
- Preferred timing: **early week (Monday/Tuesday)**

### Standing agenda items:

- White Glove inspection status (pass / deficits / corrections)
- Move-outs and 30-day notices (including forwarded notice confirmation)
- Delinquencies / late fee status / termination-risk accounts
- Intake pipeline status + upcoming move-ins
- Safety/security issues and documentation
- Technology access removals (WhatsApp / Life360 / lock access) for move-outs/terminations
- Open incidents likely leading to termination for cause

## SECTION IV — TECHNOLOGY STACK

The Property Manager must maintain active access to the following systems. Under each system are required functions and onboarding steps (these also tell the Director what must be provisioned).

### 4.1 Blink Cameras

- **Purpose:** Monitor exterior/common area activity; verify incidents and curfew concerns.
- **Required actions:**
  - Verify cameras are powered and connected weekly.
  - Review footage when investigating curfew or incident concerns.
  - Capture screenshots (and if needed, short clips) for documentation.
  - Email evidence to House Google Group; escalate to Director when termination is likely.
- **Onboarding (Director):**
  - Grant account access.
  - Confirm login works and property cameras are visible.

### 4.2 Smart Lock Dashboard

- **Purpose:** Entry/exit verification and curfew compliance.
- **Required actions:**
  - Review suspicious lock activity.
  - Screenshot logs when documenting incidents.
  - Compare lock activity with Blink and (when applicable) Life360.
- **Onboarding (Director):**
  - Assign property-level access (manager-level; not master where avoidable).

### 4.3 Life360

- **Purpose:** Location accountability for early recovery and post-relapse monitoring.
- **Required actions:**
  - Confirm new Members are added at intake.
  - Ensure required sharing settings are active per policy:
    - First 30 days: **24/7 sharing**
    - 30 days post-relapse: **24/7 sharing**
    - After stabilization: **curfew** → **5:00 a.m.**
  - Review location when investigating curfew concerns.
  - Screenshot concerning movement patterns when documentation is needed.
  - Remove immediately upon move-out/termination.
- **Onboarding (Director):**
  - Add manager to the correct property circle(s).

### 4.4 WhatsApp Groups (Property + Unit)

- **Purpose:** Daily ops, reminders, announcements, quick coordination.
- **Required actions:**
  - Use for operations only (not the official enforcement record).
  - If grievance, threat, harassment, or admission occurs:
    - Screenshot the relevant messages.
    - Email screenshots to House Google Group for archive.
    - Escalate if needed.

- Remove Members immediately upon move-out/termination.
- **Onboarding (Director/PM):**
  - Add manager to property and unit groups.
  - Ensure manager can add/remove Members as needed.

#### 4.5 House Google Group Email (Official Archive)

- **Purpose:** Official record system and central inbox.
- **Required actions:**
  - Archive all formal notices and incident documentation here.
  - Forward 30-day notices to **invoice@welvida.com** and the Housing Director.
  - Email evidence packets (screenshots/logs) here for permanence.
- **Onboarding (Director):**
  - Grant send/receive permissions.
  - Confirm PM can email the group and receive messages.

#### 4.6 Google Voice Intake Line / Ring Group

- **Purpose:** Intake calls and inquiry routing.
- **Required actions:**
  - Answer intake calls when on duty.
  - Return voicemails within 1 business day.
  - Add prospects to Asana intake pipeline.
- **Onboarding (Director):**
  - Add PM to the correct ring group(s).

## 4.7 Asana — Intake Pipeline

- **Purpose:** Prevent lost leads; track prospects and follow-ups.
- **Required actions:**
  - Every inquiry becomes an Asana entry/task.
  - Track status, follow-up dates, and outcome.
- **Onboarding (Director):**
  - Assign PM to workspace and project.
  - Confirm PM can create tasks and update statuses.

## 4.8 volunteer@welvida.com

- **Purpose:** External professional communications (probation officers, case managers, referrals).
- **Required actions:**
  - Send intake forms, contracts, and confirmations externally when needed.
  - Copy Director on sensitive issues.
- **Onboarding (Director):**
  - Provide login credentials or shared access method.

## 4.9 QuickBooks Online (Monitoring Only)

- **Purpose:** Rent monitoring and delinquency identification.
- **Required actions:**
  - Monitor paid vs unpaid status.
  - Support notices (5th) and escalations (10th).

- No invoice edits, no write-offs, no forgiveness.
- **Onboarding (Director):**
  - Grant view-only access.

#### **4.10 Google Drive**

- **Purpose:** Repository of forms
    - Review and print forms as needed.
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## SECTION V — FINANCIAL MONITORING & RENT ENFORCEMENT

For monthly rent, payments are due on the 1st, past due on the 2nd, late notice issued on the 5th, and considered in material breach on the 10th.

For deferred payments or any other invoices, the same enforcement timeline applies based on the number of days past due.

The Property Manager monitors accounts, issues required notices, documents compliance, and escalates eligible cases. The Property Manager does not extend credit, modify terms, or approve exceptions.

### 5.1 Payment Proof Collection (Daily)

- Immediately before or after daily stand-up (or at a consistent daily touchpoint):
  - Members provide proof of payment for monthly rent and/or deferred payments.
    - Acceptable proof:
      - Screenshot
      - Receipt
      - Zelle/bank confirmation
    - Verbal confirmation does not count.
  - Receive only payment with certified checks and provide receipt.
    - Forward check to Housing Director

### 5.2 End-of-Month Proactive Rent Culture

 **Objective** Prevent delinquency rather than react to it.

- Starting 5–7 days before month-end:
  - Remind Members rent is due on the 1st.
  - Encourage early payment.

- Identify likely delinquencies early and flag to Director.

### 5.3 2nd Day Past Due Trigger & CTC Initiation

When any invoice becomes past due (typically the 2nd of the month, or the day after any due date):

- Member is immediately placed on **Commitment to Correct (CTC)**
- CTC acceptance must be documented:
  - Accepted
  - Refused

### 5.4 2nd-10th Days Daily CTC Monitoring

#### **STOP CONDITION– Prepare for Termination on 10th**

Any of the following immediately disqualifies Member from consideration of financial accommodations:

- Missed day of participation
- New violation
- Failure to provide verification

Any of the above immediately disqualifies the Member from consideration for financial accommodation and places the case on a termination pathway unless otherwise directed in writing by the Housing Director.

### 5.5 5th Day Enforcement

- On the 5th:
  - A **15% late fee** applies.
  - PM issues the formal late notice and pending termination.
  - PM archives the notice to the House Google Group.
  - PM collects a promise-to-pay when permitted by policy/form.

### 5.6 10th Day Non-Payment & Escalation

If the balance remains unpaid by the 10th day after becoming past due:

- The Member is in **material breach** of the License Agreement

- The Property Manager **does not negotiate or extend credit independently**
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## Property Manager Actions

If the Member is **fully compliant with CTC**, the Property Manager may:

- Provide a **Deferred Payment Agreement overview**
  - Collect a proposed payment schedule providing for full repayment within the maximum timeframe authorized by SoberHomes policy, *while all current rent remains paid on time.*
  - Receive and document a **call from the Member's sponsor prior to escalation**, confirming:
    - Active participation in recovery
    - Current step work
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## Eligibility for Escalation

The Property Manager will escalate to the Housing Director **only if ALL of the following are complete**:

- Member has **accepted and fully complied with CTC**
  - Member has **submitted a proposed payment schedule**
  - Sponsor has **spoken directly with staff and confirmed engagement**
  - Property Manager has **documented and assessed credit risk**
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## Escalation Process

- Property Manager submits the completed documentation and **recommendation** to the Housing Director
  - Member is instructed to **schedule a call with the Housing Director**
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## Decision Authority

The Housing Director will determine whether to:

- **Terminate the housing license, or**
  - **Extend discretionary credit** under a Deferred Payment Agreement
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## Key Principle

Advancement to review is earned through demonstrated accountability.

Failure to meet any requirement results in continuation of the termination process.

**The Property Manager does not override this process** and may only escalate cases that meet all requirements.

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## Past Due → Good Standing Process Summary

**Past Due → CTC Begins (Accept / Refuse)**

**Refuse → Termination Pathway (Day 10)**

**Accept → Daily CTC Compliance (7 Days/Week)**

- **Fail → Termination Pathway (Day 10)**
- **Pass → Sponsor Verification (Required Before Director Review)**
  - **Fail (No Sponsor Call / Not Verified) → Termination**
  - **Pass → Director Review**
    - **Fail → Termination**
    - **Pass → Director May Approve Deferred Payment Agreement**
  - **Fail (Missed Payment or Missed Day) → Immediate Termination**
  - **Pay as Agreed → Return to Good Standing (CTC Ends)**



# SECTION VI — MOVE-OUT ADMINISTRATION & BILLING CONTROL

## 6.1 30-Day Notice Workflow

- Member provides 30-day notice by emailing the House Google Group.
- PM forwards the notice immediately to:
  - **invoice@welvida.com**
  - Housing Director
- PM tracks and later confirms the **actual move-out date** (notice date and move-out date can differ).

## 6.2 Mandatory Move-Out Email (All Move-Outs)

- Upon confirmed move-out (voluntary, termination, relapse, abandonment):
  - PM emails:
    - House Google Group (archive)
    - **invoice@welvida.com** (billing stop)
    - Housing Director (oversight)
- Include:
  - Full name
  - Bed/unit
  - Official move-out date
  - Reason category
  - Deposit/inspection status

## 6.3 Move-Out Checklist (Includes Tech Removal)

- **Facility readiness:**
    - Room empty/belongings removed
    - Space cleaned and reset for next Member
  - **Billing control:**
    - Move-out email sent
    - Confirm invoice stop/final invoice calculation initiated
  - **Technology removal (same day):**
    - Remove from WhatsApp property + unit groups
    - Remove from Life360
    - Remove any other tech access as applicable
  - **Rationale:**
    - Continued access after termination can create safety risks for current Members
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# **SECTION VII — ADHERENCE SUPPORT & ENFORCEMENT FRAMEWORK**

## **7.1 Foundational Context — Why Structure Is Required**

SoberHomes operates within a public health and adherence-support framework.

We recognize:

- Moving is widely regarded as one of the most stressful human life events.
- Beginning new employment is similarly high stress.
- Most Members enter with fewer than 60 days of continuous sobriety — a high-risk period.
- Many Members have co-occurring mental health conditions.
- Members are often navigating housing transition, employment transition, early sobriety, and behavioral stabilization simultaneously.

These layered stressors significantly elevate risk.

For this reason:

- The first 60 days require increased structure.
- Accountability is protective.
- Routine reduces relapse risk.
- Environmental stability increases recovery capital.
- Documentation protects both the individual and the community.

SoberHomes is structured recovery infrastructure — not simply shared housing.

Structure is not punishment.

It is protection.

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## **7.2 Governing Authority**

All enforcement actions are governed by:

- The License Agreement
- The Rules & Responsibilities Addendum
- The Violation / Termination / Commitment to Correct (CTC) documentation framework

The Property Manager applies the agreement.

The Property Manager does not create standards.

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### **7.3 Enforcement Categories**

Violations fall into four categories:

- Category A — Minor or First-Time Violations
- Category B — Repeated or Material Violations
- Category C — Intoxication or Use (Emergency Removal)
- Category D — Immediate Termination for Cause

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#### ***Category A — Minor or First-Time Violations***

Examples:

- Missed chore
- Minor curfew delay
- Storage disorganization
- First-time noncompliance

Action:

- Document objectively.
- Issue corrective instruction.
- Archive in House Google Group.
- Monitor for repetition.

If behavior repeats → escalate to Category B.

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#### ***Category B — Repeated or Material Violations***

Repeated violations are cause for termination with notice under the License Agreement.

Examples:

- Ongoing missed responsibilities
- Repeated curfew violations
- Repeated disruptive conduct
- Non-payment after required notices

Action:

1. Complete Violation / Termination / CTC documentation.
2. Attach supporting evidence.
3. Escalate to Housing Director.
4. If approved, issue Notice to Vacate and forward to [invoice@welvida.com](mailto:invoice@welvida.com).

### **Commitment to Correct (CTC)**

During a notice period:

- A Member may request a Commitment to Correct.
- CTC is discretionary and must be approved.
- CTC requires strict compliance.
- Any new violation during probation may void CTC.

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### ***Category C — Intoxication or Use (Emergency Removal)***

The License Agreement permits emergency removal due to intoxication or use.

Observable indicators may include:

- Slurred speech
- Unsteady gait
- Strong odor of alcohol
- Disorientation
- Positive drug test
- Admission of use

Action:

1. Separate individual safely if needed.
2. Request testing when appropriate.
3. Document objective observations.
4. Notify Housing Director immediately.

Emergency removal is not punishment.

If the individual exits respectfully:

- They may return once able to test negative.
- Additional accountability measures may apply upon return.

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### ***Category D — Immediate Termination for Cause***

Examples:

- Physical violence
- Credible threats
- Bringing substances onto property
- Tampering with security systems
- Severe disruptive conduct causing fear

Action:

1. Ensure immediate safety.
2. Call emergency services if necessary.
3. Document facts objectively.
4. Notify Housing Director immediately.

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#### **7.4 Supportive Behavioral Plans (Non-Punitive)**

Not all disruptive behavior is malicious or substance-related.

When behavior is:

- Non-violent
- Not intoxication-related
- And Member expresses willingness to improve

A structured Behavioral Plan may be implemented.

Example documentation:

“Resident yelled continuously for approximately 20 minutes. Speech was disorganized and not responsive to conversation. Other residents reported fear.”

Possible behavior specific plan:

- Reduce and cease yelling in bedrooms or common areas.
- Relocate to private space when episode begins.
- Other Members may remind Resident of plan.
- Encourage medical follow-up.

Progress should be acknowledged.

If safety risk emerges → enforcement governs.

## **7.5 Quiet Hours & Sleep Dysregulation Supportive Behavioral Plans (Non-Punitive)**

Common examples:

- Insomnia
- Nighttime pacing
- Kitchen activity during quiet hours

A structured Behavioral Plan may be implemented.

Accommodation may include:

- Reduce and cease quiet time activities
- Headphones
- Quiet activity designation
- Limiting appliance use after curfew

If disruption persists → document and escalate.

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## **7.6 THC / Cannabinoid Declining Concentration Monitoring**

If a Member tests positive for THC but asserts abstinence:

A monitored return pathway may be approved.

Requirements:

- Independent laboratory testing at Member expense
- Regular interval quantitative testing
- Demonstrated declining concentration over time

If levels plateau or increase → considered continued use.

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## **7.7 Documentation & Reporting Standard**

All documentation must be:

- Fact-based
- Observable
- Time-specific

- Neutral in tone
- Free of diagnosis

Do NOT write:

- “Was acting crazy.”
- “Was really drunk.”

Write:

“Resident exhibited slurred speech, unsteady gait, and strong odor of alcohol.”

Include:

- Date and time
- Location
- Witnesses
- Exact quotes when possible
- Screenshots (locks, cameras, Life360)
- Actions taken

Archive in House Google Group.  
Escalate when appropriate.

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## **7.8 Safety Threshold Override**

Supportive plans apply only when:

- No violence
- No credible threats
- No intoxication
- No ongoing safety risk

If safety threshold is crossed → enforcement governs immediately.

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## **SECTION VIII — DRUG TESTING & RELAPSE RESPONSE (OPERATIONAL)**

- PM responsibilities:
    - Issue drug tests per house protocol.
    - Document results objectively and report positives.
    - Escalate when termination for cause is likely.
      - Refused to produce a specimen
      - Use, possession or distribution of substances onsite
      - Refused to leave the property while intoxicated
  
  - Documentation:
    - Archive outcomes and supporting evidence in House Google Group.
    - Include Housing Director when escalation is required.
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# **SECTION IX — WEEKLY WHITE GLOVE INSPECTION (POST-DOUBLE SCRUB)**

## **9.1 Scope and Time Standard**

- Weekly inspection occurs after Double Scrub.
- Standard time allocation example:
  - 15 minutes per unit + exterior/systems check
  - Total ~1 hour/week
- Covers:
  - Cleanliness and organization
  - Appliance functionality
  - Safety readiness (extinguishers/naloxone placement)
  - Security systems functioning (cameras/locks)
  - Exterior standards (cigarette butts, trash, weeds/leaves, debris)
  - Storage room organization and supply readiness

## **9.2 Corrective Action Standard**

- If deficits found:
  - Identify responsible Member(s).
  - Coordinate with Housekeeping Coordinator.
  - Assign corrective tasks with a deadline (eg. correct within 24 hours).
  - Reinspect to confirm completion.
- Non-coercion:

- A Member may pay another Member to complete chores.
  - The originally responsible Member remains accountable for completion to PM satisfaction.
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## SECTION X — STORAGE & “INTUITIVE CLEANING” SYSTEMS

- Storage room must be organized so PM can:
    - Quickly assess supplies
    - Create a shopping list
    - Order supplies before running out (Amazon/Costco)
  - Storage must be:
    - Labeled
    - Intuitive
    - Restock-friendly
  - If organization slips:
    - Notify Housekeeping Coordinator so “Storage organization” becomes a Double Scrub task that.
  - Principle:
    - Easy access to supplies in kitchens, bathrooms and storage increases clean-up behavior and reduces friction.
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## SECTION XI — INTAKE & TURNOVER SUPPORT




- Intermittent but critical duties:
    - Support intake and orientation.
    - Ensure technology onboarding for new Members (Life360 and house communications).
    - Ensure move-outs are documented and spaces are ready.
    - Support the Community Creation Consultant as needed (tours/intake/orientation coordination).
  
  - Turnover is operationally high-risk:
    - Documentation must be exact.
    - Tech removal must be immediate.
    - Billing must be corrected promptly.
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## SECTION XII — GOVERNING DOCUMENTS & FORMS (REFERENCE LIBRARY)

These guide actions, rules, enforcement pathways, and documentation. Some are completed by the Property Manager.

- [Principles of Service\\_Leadership\\_ShortForm\\_LongForm](#) — leadership development guide to improve quality service within SoberHomes and skills that transfer to other roles.
- [SoberHomes House Manual](#) — resident-facing rules, routines, standards.
- [Master SoberHomes Licensing Agreement 12.17.2025 License Agreement + Rules & Responsibilities Addendum](#) — primary controlling document for obligations, enforcement, and termination triggers.
- [SoberHomes\\_Violation\\_Termination\\_and\\_Probation\\_Master\\_v2](#) — used for documenting violations and recommending CTC pathway to avoid termination (warning/CTC/termination).
- [Termination / Notice to Vacate / Promise to Pay](#) — used for non-payment and other notice pathways; PM issues/archives/forwards as required.
- [FINANCIAL ENFORCEMENT & DEFERRED PAYMENT DECISION FORM](#) Decision tree for extending credit on past due accounts.
- [SoberHomes\\_Termination\\_and\\_Probation\\_Addendum\\_Commitment to Correct CTC](#) — used when Deferred Payment Agreement is in effect or when Director authorizes probation/CTC; PM tracks compliance.
- [Deferred Payment Intake – Member Payment Schedule – Member Payment Schedule](#) — used when deferral is approved; PM tracks and collects payment proof.
- [SoberHomes Resident Intake and Acceptance Process](#) — step-by-step intake workflow; PM supports documentation and onboarding.
- [Peer House Managers Training Module Responding to Disturbances & Mental Hea...](#) — reference for neutral documentation, boundaries, escalation, and safe responses.
- [Housekeeping Coordinator - Standards & Roles](#) — defines Double Scrub, White Glove expectations, and division of responsibilities.

### Meeting Binder

-  Daily\_Readings\_Source\_Action Focused End of meeting readings focused on action precedes motivation.
  -  Print Gst\_Daily Log \_Meeting Readings and Sign-in Print each month for daily meeting to log member status and actions.
  -  Daily Log \_Meeting Readings and Sign-in Print each month for daily meeting to log member status and actions.
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## **SECTION XIII — FORMS THE PROPERTY MANAGER COMPLETES OR INITIATES**

- Violation documentation form(s), including evidence attachments.
  - Late notices / promise-to-pay forms when applicable.
  - Move-out notice forwarding and confirmation emails.
  - CTC tracking documentation (when authorized).
  - Deferred payment schedules (when authorized).
  - Weekly report email to Housing Director.
  - Daily time tracking Google Form.
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## SECTION XIV — WEEKLY PRINCIPLES OF SERVICE & LEADERSHIP (ZOOM)

SoberHomes hosts a weekly Zoom discussion designed to build service-based leadership skills that improve quality, safety, and professionalism across all homes.

This meeting supports:

- Property Managers (required attendance)
- Members serving in volunteer leadership roles
- Members interested in developing leadership skills

This is a **non-clinical leadership forum**.

It is **not therapy, not group counseling, and not a space for diagnosing others**.

The focus is operational growth and character development:

*Who am I being—and who am I becoming—so I can serve and lead more effectively in the world?*

It utilizes SoberHomes' Principles of Service and Leadership and third party leadership tools.

[Principles of Service\\_Leadership\\_ShortForm\\_LongForm](#)

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### 14.1 Purpose (Why We Do This)

- Develop practical leadership skills that transfer to work, family, and community roles.
- Improve quality of service within SoberHomes through shared principles and consistent language.
- Strengthen a culture of stewardship grounded in safety, structure, dignity, and fairness.
- Create a forum to apply principles to real operational scenarios.
- Reinforce the boundary that SoberHomes is non-clinical housing.

This meeting is a structured inquiry process focused on growth in leadership and service.

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## 14.2 Who Attends

### Required (Paid):

- Property Managers (Kimberly, Katie, and future Property Managers)

### Invited (Unpaid / Volunteer):

- Community Creation Consultant
- Housekeeping Coordinator
- Members serving in volunteer roles

### Open Invitation:

- Any Member interested in service and leadership

### Community Leaders:

- Guests with relevant leadership experience may attend periodically
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## 14.3 Compensation

- Property Managers are paid for attending.
  - Meeting time counts toward weekly hours.
  - Attendance must be logged in the Time Tracking Google Form.
  - Volunteer leaders and Members are not paid unless separately authorized in writing.
- 

## 14.4 Schedule & Duration

- Weekly recurring Zoom meeting
  - Duration: 30–60 minutes
  - Recommended baseline: 45 minutes
  - Facilitator: Housing Director or designee
  - Property Managers may rotate facilitation
- 

## 14.5 Standard Agenda (Template)

### Opening (1–3 minutes)

- Purpose reminder

- Non-clinical boundary reminder
- Confidentiality expectations

### **Reading (5–10 minutes)**

- Read excerpt from *SoberHomes Principles of Service & Leadership (Short Form or Long Form)*

### **Discussion (15–30 minutes)**

- Apply the principle to:
  - A real house scenario
  - A workplace or life scenario
- Focus on systems, behaviors, and standards—not personalities.

### **Skill Drill (5–10 minutes)**

- Practice one transferable leadership skill (see menu below).

### **Commitment (2–3 minutes)**

- Each attendee chooses one small operational improvement to practice during the week.

### **Close (1 minute)**

- Confirm next topic
  - Confirm next facilitator
- 

## **14.6 Discussion Topics (Examples)**

- Consistency vs. convenience: avoiding informal exceptions
  - Documentation integrity: what makes an incident report defensible and fair
  - Service without enabling: supporting peers while holding boundaries
  - Safety-first decision making: when to slow down, escalate, or refer out
  - Turnover excellence: room readiness, tech removal, billing control
  - Conflict and respect: neutral language and avoiding gossip dynamics
  - Environmental stewardship: White Glove standards and intuitive storage systems
- 

### **Skill Drill Menu (5–10 Minutes — Choose One)**

Each week, select one skill to practice.

---

### **1) Nonviolent Communication (NVC) — 4-Part Script**

**Observation → Feeling → Need → Request**

**Drill:**

Convert a tense house scenario into a 2–4 sentence NVC statement.

**Use for:**

- Roommate conflict
- Boundary-setting
- Reminder messages
- Grievances

**Guide:**

Nonviolent Communication 4-Part Process

<https://nonviolentcommunication.com/learn-nonviolent-communication/4-part-nvc/>

---

### **2) Neutral Documentation — Facts + Evidence + Next Step**

**Drill:**

Write a short incident note that includes:

- Observable facts only (no labels or motives)
- Evidence (lock logs, screenshots, camera time stamps)
- Clear next step (archive, escalate, notify)

**Use for:**

- Rule violations
- Curfew concerns
- Safety incidents

- Behavioral conflicts

**Guide:**

Incident Report Template & Best Practices

<https://thehsecoach.com/incident-investigation-report-template/>

---

**3) De-Escalation Micro-Skills**

**Drill:**

Practice:

- A calm acknowledgment statement
- A boundary statement
- A 10-second safe exit line

**Use for:**

- Agitation
- Arguments
- Emotional escalation in common areas

**Guide (PDF):**

NHS De-escalation Poster

<https://gmnisdn.org.uk/wp-content/uploads/2021/11/24030404-A3-Poster.pdf>

---

**4) Clear Feedback Without Blame — SBI Model**

**Situation → Behavior → Impact**

**Drill:**

Deliver a 30-second SBI feedback statement.

Then rewrite it using NVC structure.

**Use for:**

- Recurring cleanliness issues
- Noise concerns
- Boundary violations

**Guide:**

SBI Model Overview

<https://ipphlnetwork.org/post/situation-behaviour-impact-sbi-model/>

---

**5) Clear Emails & Handoffs — Plain Language Standard**

**Drill:**

Rewrite a message into:

- Subject line
- 3 bullet points
- Clear deadline
- Clear recipient / copied parties

**Use for:**

- Move-out notices
- Invoice updates
- Director escalations
- Vendor coordination

**Guide:**

U.S. National Archives Plain Writing Checklist

<https://www.archives.gov/open/plain-writing/checklist.html>

---

**6) Fast Escalations — SBAR**

**Situation → Background → Assessment → Recommendation**

**Drill:**

Practice a 60-second escalation call or email using SBAR.

**Use for:**

- Safety issues
- Termination-likely events
- Mental health disturbances (non-clinical response)

**Guide:**

IHI SBAR Tool

<https://www.ihl.org/resources/tools/sbar-tool-situation-background-assessment-recommendation>

---

**Commitment Menu (2–3 Minutes — Choose One)**

Each participant chooses one measurable action for the week.

- **NVC Commitment:** Use one structured NVC request this week (not a demand).
- **Documentation Commitment:** Submit one facts-only incident note with evidence attached.
- **De-escalation Commitment:** Use de-escalation steps once before raising your voice.
- **Feedback Commitment:** Deliver one SBI feedback conversation.
- **Email Commitment:** Send one plain-language operational email (subject + bullets + deadline).
- **Escalation Commitment:** Use SBAR once when escalating to the Housing Director.

Commitments should be:

- Small
  - Measurable
  - Operational
- 

**14.7 Ground Rules**

- **This is a service and leadership meeting**—not therapy.
- Speak in objective terms about behaviors and systems.
- Avoid character attacks or diagnosing others.
- Maintain confidentiality.
- **Start and end on time.**
- If a safety concern is disclosed, follow established escalation protocol.

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## 14.8 Materials & Source Document

### Primary Text:

*SoberHomes Principles of Service & Leadership (Short Form / Long Form)*

[Principles of Service\\_Leadership\\_ShortForm\\_LongForm](#)

### Facilitator responsibilities:

- Select a short excerpt weekly.
- Email excerpt to leadership list or House Google Group in advance (when possible).
- Optional rotation: Principles 1–9, then repeat cycle.

---

If you would like, I can also create:

- A one-page facilitator version
- A 12-week rotating curriculum version
- Or a printable Zoom meeting card version (agenda on one page)

## 14.9 One-Page Printable Meeting Card

### PRINCIPLES OF SERVICE & LEADERSHIP — WEEKLY ZOOM

Purpose: Strengthen service-based leadership and operational excellence. This is non-clinical housing — not therapy or counseling. Core question: Who am I being—and who am I becoming—to serve and lead more effectively?

#### AGENDA (45 Minutes Total)

1. Opening (1–2 min)

- Purpose reminder
- Non-clinical boundary
- Confidentiality
- Confirm time limit

2. Reading (5–8 min)

- Short excerpt from Principles of Service & Leadership
- Prompt: “What stands out operationally?”

3. Discussion (15–25 min)

Apply principle to:

- A real house scenario
- A work/life scenario

Focus on behaviors, systems, standards, accountability.

Avoid gossip, character attacks, diagnosing.

Key question: “What would stewardship look like here?”

4. Skill Drill (5–8 min) — Choose One

- NVC: Observation → Feeling → Need → Request
- Neutral Documentation: Facts → Evidence → Next Step
- De-escalation: Acknowledge → Boundary → Exit
- SBI Feedback: Situation → Behavior → Impact
- Clear Email: Subject + 3 bullets + deadline
- SBAR Escalation: Situation → Background → Assessment → Recommendation

5. Commitment (2–3 min)

Each attendee states one small measurable operational improvement for the week.

Examples:

- Submit one facts-only incident note
- Use one NVC request
- Send one clear operational email
- Use SBAR once
- Do one 5-minute safety sweep

6. Close (1 min)

- Confirm next principle
- Confirm facilitator
- End on time

Weekly Reflection: Did my behavior reflect safety, structure, dignity, and fairness?

# 2-Hour Intensive Training

Below is a **2-Hour Property Manager Training Summary & Agenda** aligned with your finalized **SoberHomes Property Manager Training Manual v5.1 (NARR-aligned, legally tightened)**.

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## **SOBERHOMES**

### **Property Manager Training**

### **2-Hour Intensive Orientation**

### **Version 5.1 Framework**

---

## **TRAINING OBJECTIVES**

By the end of this session, the Property Manager will:

1. Understand the **role boundaries and authority limits**
  2. Understand the **adherence-support model vs. punishment model**
  3. Demonstrate proper **documentation standards**
  4. Understand **financial enforcement timeline**
  5. Understand **drug testing and relapse response pathway**
  6. Be able to explain the **decision tree: Support → Escalate → Enforce**
  7. Understand required **technology use and evidence preservation**
  8. Understand the **weekly reporting and White Glove standard**
- 

## **AGENDA (120 Minutes)**

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**0:00–0:10**

### **I. ROLE CLARITY — WHAT THIS JOB IS (AND IS NOT)**

#### **Core Identity**

You are:

- An operational compliance officer
- A documentation professional
- A safety verifier
- A reporting and escalation conduit

You are NOT:

- A therapist
- A sponsor
- A rent negotiator
- A rule rewriter
- A unilateral termination authority (except safety emergencies)

**Emphasize:**

**Small, consistent 5-minute actions prevent 5-hour crises.**

---

**0:10–0:25**

## **II. TIME STRUCTURE & COMPENSATION**

### **Weekly Budget**

- 7–10 hours/week
- Most tasks: 5–15 minutes
- Larger blocks:
  - White Glove inspection
  - Intake/orientation
  - Turnover
  - Termination-level documentation

### **Administrative Requirements**

- Daily Google Form time tracking
- Monthly processing on the 1st
- Paid within 7 calendar days
- Missing logs = delayed pay

Make this clear:

If it isn't documented, it didn't happen.

---

**0:25–0:45**

### **III. TECHNOLOGY STACK WALKTHROUGH**

Walk live through each system (logins verified before training):

#### **Required Platforms**

- Blink Cameras
- Smart Lock Dashboard
- Life360
- WhatsApp (ops only)
- House Google Group (official archive)
- Google Voice intake
- Asana intake pipeline
- volunteer@welvida.com
- QuickBooks (view-only)
- Google Drive forms

#### **Key Principle**

WhatsApp = conversation

Google Group = record

Every grievance, threat, or admission:

→ Screenshot

→ Email to House Google Group

→ Escalate if termination risk

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**0:45–1:05**

### **IV. FINANCIAL ENFORCEMENT TIMELINE**

Walk through exact sequence:

#### **Before the 1st:**

- 5–7 day proactive reminders
- Identify likely delinquencies

#### **5th:**

- 5% late fee
- Issue formal notice
- Archive to Google Group
- Promise-to-pay (if applicable)

**10th:**

- Escalate
- No negotiation authority
- Director decision only

Reinforce:

Financial inconsistency erodes safety culture.

---

**1:05–1:35**

## **V. ADHERENCE SUPPORT & ENFORCEMENT DECISION TREE**

This is the core of the training.

---

### **A. Why Structure Exists**

Members often enter with:

- <60 days sobriety
- New job stress
- Moving stress
- Co-occurring conditions

Structure is protective.

Structure is not punishment. It is protection.

---

### **B. Four Enforcement Categories**

#### **Category A — Minor**

- Document
- Correct

- Monitor

### **Category B — Repeated / Material**

- Complete violation form
- Attach evidence
- Escalate
- Possible Notice to Vacate
- Possible Commitment to Correct (CTC)

### **Category C — Intoxication (Emergency Removal)**

Observable indicators:

- Slurred speech
- Unsteady gait
- Odor
- Positive test
- Admission

Emergency removal is NOT punishment.

Return permitted after:

- Negative test
- Director approval

### **Category D — Immediate Termination**

- Violence
- Threats
- Substances onsite
- Security tampering
- Severe fear-causing disruption

Safety overrides supportive pathway.

---

**1:35–1:50**

## **VI. DOCUMENTATION PRACTICE (Interactive)**

Give one scenario and have them rewrite objectively.

Bad:

“Resident was acting crazy.”

Correct:

“Resident yelled continuously for approximately 18 minutes in common area. Speech was disorganized and not responsive to direct questions. Two residents reported feeling unsafe.”

Must include:

- Date/time
- Location
- Observable facts
- Witnesses
- Evidence attached
- Action taken

Never:

- Diagnose
- Label
- Speculate
- Moralize

---

**1:50–2:00**

## **VII. WHITE GLOVE + TURNOVER STANDARD**

### **Weekly White Glove (~1 hour)**

Check:

- Units
- Exterior
- Security systems
- Fire safety
- Naloxone placement
- Storage room organization
- Supply readiness

Correct within 24 hours.

---

## **Turnover Is High-Risk**

Same-day required:

- Remove from Life360
- Remove from WhatsApp
- Remove lock access
- Send move-out email
- Forward to invoice@welvida.com
- Confirm billing stop

---

## **FINAL 5 MINUTES — CULTURE ALIGNMENT**

Ask:

1. What part of this role protects residents the most?
2. What part protects you legally the most?
3. What part protects SoberHomes structurally?

End with:

This is non-clinical recovery housing.

We support growth.

We enforce agreements.

We document facts.

We escalate appropriately.

We protect safety first.

---

## **OPTIONAL ADDITION (If Time Allows)**

Review:

- Commitment to Correct process
- THC declining concentration monitoring
- Safety threshold override rule



# PM Monthly Evaluation

Below is a **Monthly Personal Development Review Worksheet** designed specifically for SoberHomes Property Managers.

It is structured in the spirit of AA's 10th Step — ongoing self-examination, prompt correction, and growth — while remaining operational, non-clinical, and aligned with your structured recovery housing model.

This can be completed independently, then reviewed collaboratively with the Housing Director to create a focused 30-day development plan.

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# SOBERHOMES

## PROPERTY MANAGER MONTHLY PERSONAL DEVELOPMENT REVIEW

(Progress, Not Perfection Framework)

Name: \_\_\_\_\_

Property: \_\_\_\_\_

Month of Review: \_\_\_\_\_

Date Completed: \_\_\_\_\_

---

## SECTION I — MONTHLY SELF-EXAMINATION

*(Personal Integrity in the Role)*

### 1. Where did I operate with strength, clarity, and consistency this month?

Examples may include:

- Clear documentation
- Timely escalations
- Fair enforcement
- Calm conflict handling

- Organized financial monitoring
- Consistent White Glove inspections

**Reflection:**

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**2. Where did I fall short of the standard — operationally or behaviorally?**

Consider:

- Avoided difficult conversations
- Delayed documentation
- Inconsistent enforcement
- Emotional reactivity
- Informal exceptions
- Poor time tracking

**Reflection (facts, not self-judgment):**

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**3. Did I apply standards consistently — or selectively?**

- Always consistent
- Mostly consistent
- Sometimes inconsistent
- Frequently inconsistent

If inconsistent, why?

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**SECTION II — SERVICE & LEADERSHIP  
INVENTORY**

*(Who am I being in the role?)*

Rate yourself 1–5 (1 = Needs work, 5 = Strong & consistent)

<b>Area</b>	<b>Rating (1–5)</b>	<b>Evidence / Example</b>
Documentation integrity	___	
Neutral tone under stress	___	
Timely escalation	___	
Enforcement fairness	___	
Financial discipline oversight	___	
White Glove consistency	___	
Tech removal accuracy	___	
Clear communication (email/WhatsApp)	___	
Conflict professionalism	___	
Boundary clarity (no overstepping authority)	___	

---

## **SECTION III — BEHAVIORAL GROWTH CHECK**

**This month, did I:**

- Avoid gossip
- Avoid diagnosing residents
- Separate personality from policy

- Escalate rather than absorb
- Maintain operational boundaries
- Stay calm during disruption
- Protect safety first
- Use structured communication tools (SBAR, SBI, NVC)

Where improvement is needed:

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## **SECTION IV — SKILLS DEVELOPMENT ASSESSMENT**

### **1. What skill would most improve my performance next month?**

Examples:

- Neutral documentation writing
- De-escalation
- Clear written notices
- Boundary-setting
- Time management
- Financial monitoring clarity
- Intake organization
- Enforcement confidence

**Chosen Skill Focus:**

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### **2. What tools would help me improve?**

Examples:

- Documentation checklist
- Enforcement decision tree
- Weekly calendar template
- SBAR escalation template
- Plain-language email template
- Lock/log review checklist

**Tools Needed:**

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### **3. What mentorship or support would help?**

Examples:

- 15-minute weekly coaching check-in
- Shadowing Housing Director on one enforcement case
- Reviewing two past incident reports together
- Feedback on written notices

**Mentorship Request:**

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### **4. What education would strengthen my role?**

Examples:

- NARR standards review
- Fair housing refresher
- ADA boundary review
- De-escalation micro-skills
- Documentation defensibility training

**Education Requested:**

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## **SECTION V — CORRECTION & COMMITMENT**

*(Progress, Not Perfection)*

### **1. What is one behavior I will improve over the next 30 days?**

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2. What is one operational habit I will strengthen?

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3. What is one leadership quality I will intentionally practice?

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## SECTION VI — 30-DAY DEVELOPMENT PLAN

Focus Area (Choose 1–2 Only):

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Action Steps (Specific & Measurable):

1. 

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2. 

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3. 

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Accountability Structure:

- Weekly check-in with Housing Director
- Written self-check weekly
- Skill drill practice
- Template use requirement
- Other: 

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## SECTION VII — DIRECTOR FEEDBACK (Completed Together)

Housing Director Observations:

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Agreed 30-Day Focus:

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Additional Support Provided:

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## SIGNATURES

Property Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Housing Director Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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## Closing Reflection

Am I improving in safety, structure, dignity, and fairness?

Progress, not perfection.

Standards, not shame.

Growth through accountability.

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