

# **Engagement Games**

## **Policies, Procedures, Bids & Scopes**

### **Facilitators**

**Becca Sanford, Tommy Ledbetter, Shannon Barragan & Chris Rash**

*Class A: Shannon & Chris*

*Class B: Becca & Tommy*

### **As People Enter: (SLIDE 1)**

*Music:*

[https://www.youtube.com/watch?v=HqknAaKNaMM&list=RDHqknAaKNaMM&start\\_radio=1](https://www.youtube.com/watch?v=HqknAaKNaMM&list=RDHqknAaKNaMM&start_radio=1)

*Carrie Underwood: The Champion ft. Ludacris*

### **Game Plan/Notes:**

- 2 Game Show Hosts per session: Class A, Shannon & Chris ; Class B, Becca & Tommy
- What will we be wearing: [Winter Olympics 2026: USA Track Suits or Hockey Jersey.](#)
  - Matt to order: 3 buzzers, 1 white board , dry erase markers, pen and paper for each team(3 team in total), gold medal, silver medal, and bronze medal.
  - Facilitators will need a stop watch to track each question is answered within 30 seconds.
  - Facilitators will keep track of master score on white board.
  - Each team will need a pen and paper along with a buzzer.

### **Materials Needed:**

Room Decor –

- Team USA- Michelson 2026 Flags, buttons, lanyards,
- Hockey decor

## **Mission Statement: (2 minutes) (SLIDE 2)**

Welcome to the “**Policy Puck Drop**”! Just like an Olympic athlete trains for years to reach their highest potential, we too have the opportunity to create a gold-medal experience for everyone we interact with—residents and colleagues alike. This roundtable will help us sharpen our skills in engaging with others, staying aligned with our company values, and maintaining a positive, professional attitude, even in the most challenging moments.

Much like the discipline and dedication seen in Olympic sports, we’ll explore how to align our actions with company policies and foster a culture where everyone feels valued, motivated, and inspired.

**Choosing a positive mindset**, no matter the hurdles we face, will be the cornerstone of our success. Think of it as your personal “Olympic mindset”—pushing through challenges with grace and professionalism while building authentic, meaningful connections with the residents.

Much like an Olympic team that works together to achieve success, helping each of us develop the skills to make company policies and procedures feel natural and effortless. By the end of this roundtable, you’ll be equipped with tools to make every day an opportunity to achieve your personal and team “gold” in creating positive impact.

## **Ice Breaker: (10-15 minutes) (SLIDE 3)**

- ” What’s Your Hockey Name?
- Participants will go around the room and using the chart on slide 3, they will tell the room their “Hocky Nickname” and their real name and property
- They will also tell a project they are currently working on getting bids for, or something budgeted this year they will need to get bids for

## **Play Clip (Before we start game & go into details) SLIDE 4**

[https://www.reddit.com/r/hockey/comments/1ph3q71/new\\_nbc\\_promo\\_for\\_usa\\_hockey\\_at\\_the\\_olympics/](https://www.reddit.com/r/hockey/comments/1ph3q71/new_nbc_promo_for_usa_hockey_at_the_olympics/)- Promo for USA hockey at the Olympics.

# **GAME: Policy Puck Drop GAME SLIDE 5**

## **How to play (5 minutes)**

1. Divide Class into 3 Teams, by forming 3 single file lines behind each buzzer
2. Each team choose a Country for your team's name
3. Each team choose a team captain

**Format:** Facilitator will ask a question covering different categories pertaining to the Michelson Policies and Procedures. The questions are listed on the slideshow, and are in order of the manual. There are 5 categories and 5 questions in each category

**Scoring:** First team to come up with the answers first, click the buzzer, and answer correctly will receive 100 points. No duplicate answered will be accepted. Team 2 and 3 will have an opportunity to answer. If answered correctly each team can earn up to 50 points. If answer is incorrect or duplicated, team will earn 0 points.

## **“Policy Puck Drop” Questions AND ANSWERS that correspond with each slide**

*Questions for the game are listed below and will be broken into 5 categories. Each category will have 5 questions. Each question is worth 100 points.*

### **1<sup>st</sup> Category – Office Operations:**

- Name 3 items that should be given to a new move in. **SLIDE 6, Answers on SLIDE 7**
  - A Move In Gift
  - Michelson Resident Handbook
  - Michelson Tips and Guides
  - Community site map
  - USPS change of address cards
  - Move In/Out Checklist
- Besides Happy Residents, what are at least 4 benefits to creating an environment for happy residents. **SLIDE 8, answers on SLIDE 9**
  - Higher community reviews!
  - More resident engagement online and in events
  - Resident referrals
  - They have positive things to say when on a tour with a prospect!
  - It typically means you're also creating a Happy Team!

- It shows your residents you care about the community you work at.
- List 5 reasons our resident questionnaires and surveys are important. [SLIDE 10, Answers on SLIDE 11](#)
  - Provide important feedback
  - Brings issues to the front we may not know about
  - Open communication to the residents and prospects where they can communicate in their own words.
  - Allows for bragging on the teams
  - Generates conversation resulting in reviews.
- Name 5 important steps done throughout the lease term that contributes to our renewal process. [SLIDE 12, Answers on SLIDE 13](#)
  - 120 Day Call
  - Peach Card
  - Renewal Menu
  - Anniversary Letter
  - Engage throughout renewal process
  - If notice is given: efforts should be given to retain the resident
  - Smooth move-in
  - Resident events
  - 24 hour work orders
- List 5 Resident Questionnaire/ Surveys that are sent out via email to residents. [SLIDE 14, Answers on SLIDE 15](#)
  - Bi- Yearly Resident Questionnaire
  - Notice given survey
  - Maintenance work order survey
  - New move in survey
  - Past resident survey
  - Renewal survey

## **2<sup>nd</sup> Category - Maintenance:**

- What is the purpose of Michelson's STOP door tag? [SLIDE 16, answers SLIDE 17](#)
  - To remind staff and vendors to turn everything off in an apartment when they exit to minimize utility costs.
- Name at least 3 items that should be done during an Apartment Preventative Maintenance. [SLIDE 18, answers on 19](#)
  - Change batteries on smoke detectors
  - Change ac filters
  - AC coil cleaning
  - Inspect HWH (age of the property)
  - Check for foundation/wall cracks
  - Check the overall condition of the apt
  - Pet checks
- Name at least 4 items that should be done during an Exterior Preventative Maintenance. [SLIDE 20, answers on SLIDE 21](#)
  - Gutter cleaning
  - Check and clear drains

- Periodic insecticide spraying around exterior of the apt buildings
- Power washing buildings, breezeways and common areas
- Exterior light checks
- Cleaning out dryer vents
- Name at least 2 maintenance emergencies. **SLIDE 22, answers on SLIDE 23**
  - Sewer Backup
  - Any Flooding
  - Damage caused by natural disasters
  - No AC and it is above 80 degrees outside
  - No Heat and it is below 60 degrees outside
  - Evidence of smoke/fire
  - Inoperable stove or fridge and it will be more than 15 hours before reg. maint. hours
  - Inoperable hot water heater and it will be more than 15 hours before reg. maint. hours
  - Gas Leak
  - Inoperable smoke detector
  - Lock out or inoperable front or patio lock
  - Inoperable toilet when there's only 1 in the apartment
- Name at least 4 work order priorities that must be completed before the end of the day. **SLIDE 24, answers on SLIDE 25**
  - Garbage disposal
  - Clogged toilet (if they have 1)
  - No AC, above 75
  - Minor leak such as a sink or AC

### **3<sup>rd</sup> Category - Leasing Manuals:**

- Name 3 factors included in a market study. **SLIDE 26, Answers on SLIDE 27**
  - Number of units
  - Amenities - apt and community
  - Rent
  - Specials, concessions, etc.
- Besides a caller's basic needs and interests, name 3 things we should also learn. **SLIDE 28, answers on SLIDE 29**
  - Current residency/location
  - Reason for moving
  - How they heard about us
  - Amenities/social activities they are interested in
  - General demographics - where they work, how many are moving with them, etc.
- **300 PTS:** Name the 4 personality types. **SLIDE 30, answers on SLIDE 31**
  - Analytic
  - Expressive
  - Driver
  - Amiable
- "Hot buttons" are a part of the prospect's personality that might modify their logical decision-making. Name three examples of a hot button. **SLIDE 32, answers on SLIDE 33**
  - Finances/Investments
  - Friends/Family
  - Recreation/Leisure

- Convenience/Privacy
- Name **all** of the protected classes under the Fair Housing Act. [SLIDE 34, answers on SLIDE 35](#)
  - Race
  - Color
  - National Origin
  - Religion
  - Sex (including gender identity and sexual orientation)
  - Familial Status
  - Disability

#### **4<sup>th</sup> Category General Policies and Procedures:**

- Name 2 scenarios that allow us to give a key to a resident's immediate family or friends. [SLIDE 36 / 37](#)
  - They are an occupant or guarantor of the lease
  - We have written permission from resident
  - If due to death of resident - only when letter of administration is provided
- Name the Qs of the Michelson Mission. [SLIDE 38/39](#)
  - Quality Communities
  - Quality Homes
  - Quality Service
- When is it permissible for cash to be handled in the office? [SLIDE 40 / 41](#)
  - Petty cash fund
  - Collecting coins or cash from laundry/vending services
- Name the process to handle and remove a derelict vehicle. [SLIDE 42 / 43](#)
  - If car is in system, notify resident via phone to make them aware
  - Tag car with tow notice
  - Give resident allotted time to correct situation
  - If not handled within allotted time, tow vehicle from property
- Name 3 examples of preventative risk management. [SLIDE 44 / 45](#)
  - Notifying residents of changes in rules and regulations
  - Re-keying apartments at move out or when requested
  - Inspecting exterior lighting
  - Being familiar with local emergency procedures

#### **5<sup>th</sup> Category Michelson "Gold Medal" Standards:**

- What are the three requirements to hitting the summit. [SLIDE 46 / 47](#)
  - 100% occupancy
  - \$0 DQ by 10th
  - Higher market rents than comps
- List 4 examples of the "unreasonable hospitality" we can utilize to make a friend/engage in our prospective or current residents. [SLIDE 48 / 49](#)
  - Tailored move in gifts
  - Tailored renewal gifts
  - Helping resident wipe snow off vehicle
  - Feeding cat while resident is stuck at work

- Bringing resident's package to them from package room
- Gifts/Cards when a resident experiences an illness or personal loss
- (Any example that shows going above and beyond for our residents or prospects)
- What 3 qualities can make you successful at Engaging Leasing. [SLIDE 50 / 51](#)
  - Authentic communication
  - Listening
  - Open ended questions
  - Going beyond small talk
- Name at least 4 important factors to engage with prospects that are not ready to fill out an application. [SLIDE 52 / 53](#)
  - Determine if there was anything else they were looking for in their new home.
  - Ask what it would take to get them to lease that day.
  - If viewing other comps, use your Market Notebook to review (objectively) the differences between them and our community.
  - Identify your audience & provide useful content
  - Inform about community and how we interact
  - STAYING ENGAGED
  - Show off your success
  - Be persistent but not pushy
- What 5 services can you provide to ensure effective resident retention. [SLIDE 54 / 55](#)
  - Provide what was promised
  - Your willingness to help
  - Inform of changes in your property
  - Understanding your neighborhood and competitors as they grow
  - The way you present the community and yourself.

### **6<sup>th</sup> Category Bids and Scopes:**

- What must be included in a bid? [SLIDE 56 / 57](#)
  - Labor
  - Materials
  - Equipment
  - Assumptions
  - Exclusions
- Name 2 risks of an unclear scope? [SLIDE 58 / 59](#)
  - Scope Creep
  - Disputes
  - Unpaid work
  - Delays
- Why must exclusions be clearly stated and documented within bids? [SLIDE 60 / 61](#)
  - Prevent assumptions
  - Disputes
  - Unpaid Work
- Why are company policies important? [SLIDE 62 / 63](#)
  - Insure consistency
  - Protect the company
  - Protect the employee
  - Define authority and accountability

# **BIDS and Scope of Work** **SLIDE 65** Pass out Class Handout #1 and Discuss with the class

## **(Class Handout 1)**

- **Purpose:**
- This training provides a clear understanding of company policies and procedures, how bids are created and approved, and how scopes of work define and protect project execution. These systems work together to control cost, reduce risk, and prevent disputes.
- **1. POLICIES & PROCEDURES**
- ***What Are Policies & Procedures?***
- Policies and procedures establish the rules and expectations for how work is approved, documented, and performed.
- ***Why They Matter:***
- Ensure consistency across projects
- Protect the company legally and financially
- Define accountability and authority
- Reduce errors and rework
- ***Key Expectations:***
- Follow approval authority at all times
- Document decisions and changes
- Never begin work without proper authorization
- Communicate issues immediately
- Common Policy Areas
- Approval authority
- Change orders
- Documentation requirements
- Safety and compliance
- Communication protocols
- **2. BIDS:**
- ***What Is a Bid?***

- A bid is a formal pricing proposal that defines the cost of work based on a specific scope of work.
- ***What a Bid Is NOT:***
  - Not an estimate “just to get the job”
  - Not verbal pricing
  - Not flexible without written approved changes
- ***Required Bid Components:***
  - Scope
  - Labor
  - Materials
  - Equipment
  - Assumptions
  - Exclusions
- ***Common Bid Risks:***
  - Underestimated labor
  - Missing exclusions
  - Incomplete scope alignment
  - Verbal approvals
- **3. SCOPES OF WORK:**
  - ***What Is a Scope of Work?***
    - A scope of work defines exactly what work will be performed and what is excluded.
  - ***Why Scope Clarity Matters:***
    - Prevents disputes
    - Prevents scope creep
    - Protects profit
    - Sets expectations clearly
  - ***Required Scope Elements:***
    - Detailed description of work
    - Deliverables
    - Timeline
    - Responsibilities
    - Exclusions
  - ***Key Takeaways:***
    - Policies guide decisions
    - Bids define pricing
    - Scopes define execution
    - Documentation protects everyone

## Review Actual Roof Bids with Class **SLIDE 66**

Class Discussion:

BID #1 **SLIDE 67**

- What do you notice about this bid?
  - It lacks possible pricing on exclusions
  - It's vague in the scope of work
  - Timeline expected
  - Are there additional charges for equipment rental?
  - What warranties does it come with?
- Bid #2 **SLIDE 68** (double click on the photo to go thru the 8-page BID) What do you notice about this bid?
- How does it compare to Bid # 1?

## GAME: SCOPE CURLING **SLIDE 69**

CLASS HANDOUT Mock Bids

Format:

- Class divides into groups of 4
- 2 Maintenance, and two Office on each team at least
- Each team will receive a different mock bid/scope.
  - Mock Bid # 1: Concrete Replacement
  - Mock Bid # 2: Pool resurfacing
  - Mock Bid # 3: Roof Replacement
    - Each Group will have to review as a team to find the incorrect sections or errors within the document.
    - Discuss as a team.
    - The Team Captain will then present to the class what they found and the changes that needed to be made per the Michelson policy

### **Mock Bid # 1 Concrete Replacement ANSWERS**

**MOCK BID #1 – Gateway Concrete Solutions**

**⚠** Intentionally Missing: ADA Compliance Language

**What's Missing & Why It Matters:**

**✗** Bid #1 – Gateway Concrete Solutions

**Missing:** Explicit ADA compliance language

Why It's a Problem:

The scope requires ADA routes, slopes, and corrections at no cost

Owner could be liable for non-compliance

Creates costly change orders post-install

Teaching Point:

If ADA is not explicitly acknowledged, it is not enforceable.

### **MOCK BID #2 – Midwest Flatwork & Paving**

⚠ Intentionally Missing: Phasing & Resident Access Plan

**What's Missing & Why It Matters:**

✗ Bid #2 – Midwest Flatwork & Paving

**Missing:** Phasing & resident access plan

**Why It's a Problem:** Property is fully occupied

No limits on closures

No temporary access strategy

High risk of resident complaints, safety issues, and stop-work orders

Teaching Point:

In occupied communities, logistics matter as much as price.

### **MOCK BID #3 – Arch City Concrete (BEST BID – COMPLETE)**

✅ Fully Compliant with Scope

## **Mock Bid # 2 Pool Resurfacing ANSWERS**

### **ANSWER SHEET — BID ISSUES ONLY**

#### **BID #3 — River City Aquatic Construction, LLC**

Issues Identified:

None

Bid fully aligns with scope of work

No responsibility gaps

No scope creep triggers

✅ No deficiencies

#### **BID #2 — Midwest Aquatic Construction, LLC**

**Issues Identified:**

- Does not explicitly assign contractor responsibility for:
- Permits
- Health department inspections

- Final approval to operate
- Surface preparation method not defined (hydro-blast not guaranteed)
- No neutralization requirement after acid wash
- No debris disposal responsibility stated
- Shell repair scope lacks:
- Structural issue notification requirement
- Unit pricing for additional repairs
- Resurfacing system does not state freeze/thaw rating
- Tile and fitting scope missing:
- Lights and niches
- Replacement of gaskets and seals
- Verification of watertight penetrations
- ADA scope incomplete:
- Handrails and ladders not listed
- No verification prior to inspection
- Pool lift coordination omitted
- Start-up scope incomplete:
- No brushing schedule
- No curing duration
- No written start-up log
- No staff training
- Inspection and turnover missing:
- Contractor-led inspection coordination
- Requirement to pass inspection prior to final payment
- Documentation deliverables
- Warranty lacks defined coverage (bond failure, delamination, cracking)
- Exclusions not stated

**BID #1 — Gateway Aquatic Solutions, Inc.**

Issues Identified:

- Regulatory responsibility shared/vague (“coordinate with ownership”)
- No unit pricing for additional shell repairs
- ADA compliance partially shifted to owner (pool lift and verification)
- Start-up scope incomplete:
- No brushing schedule
- No curing requirements
- No written logs
- No staff training
- Inspection responsibility not owned by contractor
- Final payment not tied to passing health department inspection
- Warranty excludes:
- Delamination

- Bond failure
- Surface cracking

## ***Mock Bid # 3 Roof Replacement ANSWERS***

### **BID #1 Issues**

- Missing explicit permit responsibility
- Insurance not clearly additional insured
- Workers comp not stated
- Ice & water locations incomplete
- Flashing vague
- Ventilation not code tied
- Deck pricing undefined
- Resident notice timing missing
- Weak warranty
- Exclusions vague

### **BID #2 Issues**

- Permit responsibility shifted
- Insurance vague
- Owner coordination burden
- Ice & water vague
- Flashing incomplete
- Ventilation optional
- Deck approval delay risk
- Resident notice responsibility unclear
- Additional insured not stated

### **BID #3**

- ✓ No major deficiencies
- ✓ Matches template scope
- ✓ No responsibility gaps
- ✓ No scope creep triggers

***Before bidding out projects, teams should put together their own SOW's so they have an idea of what an estimate should come out to before receiving bids.***

***Once you have all correct bids in place with the same scopes, you can easily present them to your manager for approval!***

***Thank you for your time and attention, and we look forward to seeing you at the top of the Summit!***

