

Co-op Coalition Survey: Interview Guide (9-2020)

Thanks to the 12 people who took the time to help out another co-op member.

In a message dated: Sat, Aug 29, 2020 12:50 pm

Subject: SURVEY - Co-op Coalition: Interview Guide Questions and Issues (Due 9/11)

Most co-ops interview prospective new residents - buyers, renters, and guests - before they go to settlement or move in. Some co-ops have Board members conduct the interviews while others have co-owners conduct the interviews or a blend of Board and non-Board members. One co-op had stopped their interviews but are about to reinstate them. They are interested to know what others include in their interviews to help them prepare their interview guide. Their question follows. Please "respond" and provide whatever assistance you can by Friday, September 11.

What resources do other co-ops have that they use for new shareholder/renter interviews? We haven't done any interviews in some time, and it might be helpful to see a list of questions other cooperatives have been asking prospective residents. Thanks for your help.

DC Cooperative Housing Coalition

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<25 units	We don't have scripted interviews with pre-determined questions, per se, but we use the interview to point out the following: -intro to the Board, what each Board member likes about the community -general highlights of the community (some logistical discussions like the laundry room, where the trash is, etc) -for buyers, we gauge if they're an investor or bonafide owner-occupant/resident. Otherwise, it affects our ratios for financing and homestead deduction -an opportunity for the individual to ask the Board any other questions
<25 units	We conduct the interviews with the full board. Prior to the interview the board receives the application which includes letters of reference, employment information, and financial information. The prospective buyers receive our by laws, financial information and our house rules. All of this information provides the background for our questions. We do not have a set list of questions. Of course the financial information is key and if there are points that we need clarified, these issues would have priority. We also spend time reviewing the by laws and house rules to make sure the buyers understand the workings of a coop and our building culture.
<25 units	1. The Board interviews all new owners; with very limited exceptions, we do not permit rentals, but if there were a rental, we would interview the tenants. 2. Before the interview, we request the following: (i) a financial statement, (ii) most recent tax return, (iii) two letters of recommendation, and (iv) a letter of introduction written by the applicant(s). 3. At the interview, we do not have a fixed list of questions. If the submitted material raises any questions, they would be asked at that time. During the interview we do emphasize that we are a community where all shareholders who are able are expected to participate in the management and

	<p>maintenance of the building. We also describe the financial condition of the building -- the status of our reserves, whether we anticipate a special assessment or increases in the monthly assessments, major projects in the works, etc. -- so that there will be no financial surprises for the new owners.</p> <p>4. It is important not to evidence any discriminatory intent during the interview. In the past, coops were accused of using the interview to exclude racial and religious groups. To the extent the Board uses a procedure, it must be applied equally to all applicants.</p>
25 – 49 units	<p>Our Board interviews all prospective shareholders and sublease tenants. For shareholder interviews, we need at least 3 of the 5 Board members; for sublease tenants, 2 is okay. Before the interview, the whole Board looks at their applications. If shareholders, it's the document we get from the transfer agents--it has the prospective shareholders' background checks, their financial disclosure, the purchase agreement, information about their mortgage, etc. We also send our House Rules and ask the prospective shareholders to review them ahead of time. We ask questions if we have any concerns or questions from the document. We try to make sure that prospective shareholders and sublease tenants really understand the House Rules. We used to do this in person. This year, we've done it via Zoom.</p>
25 – 49 units	<p>Our coop interviews all adults who wish to become residents. We use an application form to collect basic contact information and request two letters of reference. We don't have a set list of questions, but I can recommend the following:</p> <p>We open the interview by asking the applicant(s) to tell us a little bit about themselves. This open-ended question without any incorrect response tends to put them at ease and can segue into questions that they may have. If they are not from our area, we discuss neighborhood services and public transportation options.</p> <p>We always ask whether they have read, understand, and agree to our House Rules. Again, a good way to bring questions forward, and because we always ask this we can later remind a resident that they agreed to the House Rules during their interview.</p> <p>We ask when they plan to move in, using this as a way to review restrictions on moving days/times in the House Rules and explaining that arrangements must be made in advance with front desk. We offer helpful information about reserving street parking for moving trucks if needed.</p> <p>We talk in general about our building services (front desk, packages) and use of common areas (laundry, garden, etc.) Parking availability often comes up - if not, we ask whether they have a car, trying to pre-empt unauthorized parking on our property.</p> <p>We talk about building security and use of our call-entry box. At our discretion, we might discuss best practices for personal safety late at night. If they want/need extra keys for friends/family it usually comes up here.</p> <p>With potential owners, we ask about any remodeling plans and discuss when Board approval is required and how to submit a request.</p> <p>We always close the interview by asking if the applicant(s) have any other questions, telling them that if something is not going to work out it is better to discover this before they move in.</p> <p>We'll be interested to see what questions others are asking - might pick up a few ideas.</p>

25 – 49 units	We typically focus on the House Rules and get the prospective shareholder or tenant to agree to abide by them. We specifically focus on those affecting noise, no smoking for tenants, limited parking time in the front driveway, and the requirement to do all moves through the rear service elevator.
25 – 49 units	We don't really ask questions so much as go over information about the building and what's expected of members so there are no surprises.
50 – 74 units	All we (the Board) do at [our co-op] is ask if they've read the house rules and bylaws and if they're willing to abide by them. We also ask if they have any questions about the bylaws and rules. Also, we do ask for their bank statements and pay stubs to see if they have the financial wherewithal to afford their purchase.
75 – 99 units	We have developed the following documents to help with our interviews [<i>3 documents appended to response that were shared with the co-op requesting survey</i>]. We have all three to help with board turnover and to maintain institutional practices. We provide the welcome info in addition to our complete rules, regs and bylaws. We have found the short summary answers many questions we received from applicants, and covers information we would highlight for them before moving in. We are happy for these documents to be shared with anyone interested.
100 – 199 units	No responses
200+ units	We don't conduct interviews. The Board reviews the financial package for purchasers and the lease application package for renters.
200+ units	<p>Our co-op had always interviewed every potential co-owner, renter and guest for over 50 years BEFORE prospective buyers went to settlement or renters moved in. However, effective January 2019, the Board decided to stop interviewing people before they purchased/rented/moved in as a guest. Instead, they meet with the new residents as a group AFTER they purchased and moved in.</p> <p>For those 50+ years, prospective residents met with members of the Admissions Committee made up of co-owners—not the board. Two members of the Committee met with one or more prospective residents in the evening, but day and time changes were always made to accommodate the people being interviewed. The Committee members had a set script to ensure the interview covered everything that needed to be discussed and was consistent from interview to interview, year after year (but periodically updated as needed). At least two questions were always asked: What is a cooperative (not everyone understood the difference between a co-op and a condo) and a question about a House Rule to see if they had read the them (that was in addition to signing a document indicating they had read and would abide by them).</p> <p>This new policy was made by the board without any input from, or communication with, the long-time chair of the Admissions Committee. The Committee now gives new owners and renters a group orientation and tour of the complex about a month or two AFTER they move in. Given Covid-19, the Committee has not been able to personally welcome new residents or give them the orientation and tour nor address their questions and concerns.</p> <p>The new method has not worked out as well since during the first year of implementing the new policy, some new residents have failed to attend the “required” tour after moving in. Given that problem, early this year, the board was forced to amend the House Rules mandating these tours. However, the revised House Rule does not provide for significant penalties so only time will tell how this new method of introducing people to the co-op and addressing their questions and concerns works out.</p> <p>Personally, I think an interview should be held BEFORE people move in to welcome them, share our rules and expectations with them, and perhaps most important, address any questions or concerns. We now have a small</p>

and growing number of people who, because of COVID-19, have moved into our co-op but haven't been welcomed and may have no idea how things work. To me, there is a loss of community spirit and identification.

Interviews in the past haven't always been in person and had been done via phone or Skype when a prospective resident, especially a new co-owner, lived a great distance away and could not meet in person. Unfortunately, the Board didn't see the importance of early interviews. Interviews are an opportunity to welcome new people, provide expectations, and to answer their questions and address their concerns. As it stands now, that link has been broken and only time will tell what effect, if any, the new policy will have on our community.