



# **Courtesy Officer Job Description**

## **(Sample, Revise as needed)**

My Departmental schedule is:

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### **The following activities are required by a Courtesy Officer**

1. Officers are required to have authorization to work for the property from their respective department.
2. Officers are required to patrol (uniform or plain clothes) the property by foot and vehicle to provide the greatest visible presence on the property. (This means they can't just drive the perimeter of the property.)
3. Officers are "on call". (This should be detailed as to how they are to be contacted and what their response should be).
4. Officers are required to be patrolling the property X times per hour/shift/day/week.
5. During the officer's patrol the following specific areas will be checked each time to determine if the area is secure:
  - a. Pool area. Detail hours and property rules.
  - b. Laundry rooms
  - c. Fitness Center
  - d. Offices
  - e. Maintenance storage
  - f. All gates. Gates (drive through and pedestrian) should be numbered.
  - g. Lighting: (Report any lighting needing replacement/improvement.)
  - h. Fencing (they will have to observe the entire perimeter fence)
  - i. CCTV: (all that can be observed is if they are pointing where they are supposed to)
6. Officers will complete a Daily Activity Report (DAR) every day they work. This report must be turned in daily to the office by \_\_\_\_\_.
7. Any incident that requires an arrest or involvement in an investigation of a serious nature should be reported by phone to XXXX.
8. Officers should take every opportunity to introduce themselves to our tenants. (This serves two purposes: foremost it connects the officer to the residents. Secondly it gives the officer probable cause, in a nice way, to approach people they do not know.)
9. Officers should randomly walk through the parking lots to observe the interior of vehicles. Tenants should be reminded to not leave valuables in their cars. This reminder can be accomplished a number of ways: notice to all tenants, emails, official reminder by officer in the way of a "We noticed...We Care" as a way to remind tenants to not leave things in their cars.
10. Officer will meet with patrol officers of the patrol district of our property each month. (This should be documented).
11. Officer will attend all resident meetings.

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12. Officer will attend staff meetings as directed.
13. Vacation schedule will be provided at least 2 weeks in advance. (What do you do about coverage?).
14. Officers will complete a Monthly Activity Report and submit to \_\_\_\_\_ the first day of each month.
15. Courtesy officers will analyze crime trends within the property on an ongoing basis and submit observations and recommendations to the Property Manager. (This analysis involves tracking the various crimes as to Day of Week, Time of Day, and location within the property. A plot of the property should be used to mark the locations of burglaries, car break ins, etc on a continuous basis. This information can be shared with the property's Crime Watch and other residents. Burglaries occur primarily during daytime hours. Crimes against people are more likely to occur at night.)

Signed \_\_\_\_\_ Date \_\_\_\_\_



## **Developing a Daily Activity Report**

If any security personnel are utilized, a DAR should be in place. Guard companies should have their own company version however a property may have proprietary security guards or Courtesy Officers. Regardless, there needs to be a mechanism in place that documents their time and activity.

Below are three templates that are fairly common formats. A spiral notebook would suffice as long as every day is documented and there is a documented supervisory/management review of each day. Notebooks however, when lost, lose all documentation.

The report's primary purpose is accountability. It is virtually the only method one can ensure the officer is properly performing their duties. The report itself can as generic or detailed as needed for the position. Three versions are offered below.

### **Version I**

This version outlines some specific areas that are required to be checked each time the officer patrols the property. It is recommended that specific areas to be checked (i.e. pool) be listed individually to ensure consistency. The report can be formatted any number of ways to capture the information required. While checking the same things each and every time may seem redundant, the consistency of duties performed is vital to managing security personnel. The time should be shown as to when each area was checked.

### **Version II**

This version is fairly straightforward. The security person documents the time they conduct any activity (patrol, checking buildings, light checks). This format is more likely to leave to chance that critical functions could be overlooked especially if a fill-in person is working. Regardless, detail is important when completing these reports. They will be critical in the event of litigation or in assuring that the person is doing as directed.

### **Version III**

This is a mix of both formats.

### **Report Distribution**

- **Daily Activity Reports:** A copy is maintained by the Courtesy Officer and a copy is given to the Property Manager each day.
- **Serious Incidents:** Whether there is a separate document for serious incidents or they are recorded within a Daily Activity Report a copy should be forwarded to the District Manager and Corporate Offices. Internal written policy should be in place to establish the proper protocol.
- **Monthly Activity Report:** A copy is maintained by the Courtesy Officer and distributed to the Property Manager, District Manager, and Corporate Offices.







## DAILY ACTIVITY REPORT

Version III

**Date:** \_\_\_\_\_

**Officer:** \_\_\_\_\_

Time	Comments
	Pool area. (Detail hours and property rules.) _____ Laundry rooms _____ Fitness Center _____ Offices _____ Maintenance storage _____ All gates. Gates (drive through and pedestrian) _____ Lights _____ Fencing _____ CCTV _____
<b>1700</b>	Met with management in office and discussed any new concerns or issues.
<b>1900</b>	All areas secure. One parking lot light out on SE lot, directly in front of apartment 118.
<b>1930</b>	Patrolled Phase II and all was secure. Observed no unusual activity
<b>2130</b>	I observed a vehicle draft behind a tenant entering gate 1. The car, a 2002 Escort, was driving slowly through the parking lot and did not park. I stopped the driver and identified myself. The driver, John Doe, 1234 Main St, said he was looking for a friend's apartment, #1122. The friend's name was Sally. I advised him we did not have an apartment by that number and he did not know Sally's last name. I advised him to leave the premises. 2002 Ford Escort, Blue. TX 123XYZ
<b>2300</b>	No unusual activity
<b>0100</b>	Off duty

A copy of any activity report containing a "serious incident" should be forwarded to your District Manager and Corporate Office.



**Monthly Activity Report**

When the officer's job description is structured and there are certain activities that must be completed each month, there should be a method to document that those were successfully completed. This report should be submitted by the first day of each month.

Sample

1. Met with area patrol officers. (Decide if this is to be certain or all shifts).\_\_\_\_\_
2. Participated in community crime watch meeting.\_\_\_\_\_.
3. Distributed reminders about property left in vehicles.\_\_\_\_\_.
4. Obtained police incident reports for all serious crimes on property\_\_\_\_\_.
5. Reviewed area crime statistics.\_\_\_\_\_.
6. Reviewed Community bulletin boards to ensure crime prevention tips are current\_\_\_\_\_.

Criminal Activity (Based on their review of crime statistics of the property)
Burglary_____ Auto Theft_____ Burglary of vehicles_____ Criminal Mischief_____
Robbery_____ Aggravated Assault_____ Murder _____ Sexual Assault_____
Other_____

Recommendations:

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Submitted by:\_\_\_\_\_ Date\_\_\_\_\_

Reviewed by:\_\_\_\_\_ Date\_\_\_\_\_

Copy to District Manager Date:\_\_\_\_\_ Copy to Corporate Offices Date:\_\_\_\_\_

Revised Date:\_\_\_\_\_



## Incident Reporting By Tenants

Tenants should be encouraged on a regular basis to report any crimes that they may have experienced. Reports should be a formal document that is maintained in a binder. A copy should be placed in the tenant's file. It is not recommended that the only copy of the report be kept in the tenant's file. Check with your legal department on the length of retention.

### Reporting Methods

A template can be placed on the property's web site so the tenant can print the document and fill out. This however requires the tenant to hand deliver the report to the office. This same template can be developed to allow the tenant to fill out the form and then electronically send the report to the office. It should be recognized from the beginning that this electronically transmitted form will be used for many things other than the intended purpose.

Many properties require a tenant to create a written report in person at the office to report a crime. Tenants may also be required to produce a copy of a police report as "verification" of the crime. Placing burdensome requirements on tenants defeats the purpose: you want the information about crime that occurs on your property. Certain crimes such as sexual assault and murder will naturally prove to be problematic with strict reporting requirements. Information regardless of its source is vital to crafting appropriate crime prevention measures. Claiming no knowledge of crime unless "properly reported" by a tenant will hold no water in a litigation setting. Consider all reports of crime from tenants as valid. It is not the responsibility of the management to determine if any or all of the information is valid/accurate. Have the tenant provide the case number assigned to it by the police department. If it was not reported to the police, notate as such on the report. Management has equal access to police reports through Open Records Requests. If the incident is of such a nature to require a copy of that report, it can be requested directly.

### Providing Notice to Tenants

Criminal activity information should be provided to all tenants. Notification should be prompt and bilingual. Notices can be issued in a number of ways but perhaps the most convenient is at common locations such as mail boxes, exercise rooms, pools, and laundry areas. A mix of methods ensures the widest notification such as the use of email and notices. Crime notices should be maintained in a single file. Check with your Legal Department regarding retention policies.



## **Security Officer Post Orders**

Security guard services can be an integral aspect of an overall crime prevention program. Generally there are two types of services: a.) personnel who are assigned to a location who patrol and/or are stationed at a post, and b.) a “Patrol Service” whereby the company is contracted to drive by/through a location a prescribed number of times. That patrol may also include the checking of specific doors, buildings, etc. but in general they drive a marked security company car through the client’s location as a deterrent through visibility.

### **Post Orders**

Post Orders are an agreed upon list of duties, responsibilities, and actions for a specific client or location. Clearly written Post Orders are critical because over time multiple individuals will work on a client’s property and consistency is vital and it establishes a legal agreement with the security contractor as part of the overall contract. There should be no services agreed to without the collaborative creation/approval of the guard company’s duties on your property.

The apartment industry creates challenges for security companies from many aspects that are different than most other clients. It is an environment that presents a wide range of situations that range from interacting with residents with annoyance complaints to responding to/observing violent crime to emergency response. These are the very reasons that Post Orders should not be created from a boiler plate document and the review of these should be on-going to meet the shifting environment. The list of potential activities for a security officer is no different than that of a police officer. Refer to the previous section in Courtesy Officers for general concepts.

The major differentiator between a guard and law enforcement is that guards are no more than civilians when it comes to powers of arrest. A person detained by a guard cannot be charged with fleeing or resisting arrest. A person assaulting a guard cannot be charged with offenses usually associated with injury to a police officer. (Check your local jurisdiction as laws change over time). Conversely, there is the risk that a security officer may “feel” like they are “law enforcement” thus exposing themselves, the residents and management company at risk.