User Guide
Property Manager/Owner Scoring System
Tolemi BuildingBlocks Platform

City of Rochester, NY
Malik D. Evans, Mayor
Rochester City Council

Table of Contents

Background

This project was supported by grant funding from the NYS Attorney General's Office, via the Enterprise Community Partners' Cities RISE program. The program is intended to support innovative projects to advance equitable code enforcement. The Property Manager/Owner scoring system was originally envisioned by Gary Kirkmire, longtime head of the City of Rochester's Division of Code Enforcement and then Commissioner of Neighborhood and Business Development. The goal was to provide an objective and transparent public scoring system that could be used to drive improvements in code compliance. It could be used by City staff to target enforcement provide tenants better insight on rental decisions, and allow owners to see how prospective property managers rate within the city.

To make the scoring system a reality, City staff worked in partnership with Tolemi. The City has provided Tolemi live feeds of code enforcement and property data for public access in their BuildingBlocks online platform since 2017. Building upon this, Tolemi ingests this data and processes the scoring system for viewing in BuildingBlocks.

The scoring system was also workshopped extensively with the Landlord/Tenant Advisory Committee, which is convened by the City to provide input on proposed policies and initiatives. The group is comprised of the leaders of all the known landlord associations, other small landlords, and tenant and community advocates. The committee reviewed several iterations of the scoring system over the course of nearly two years and provided valuable feedback which was incorporated into the final version of the scoring system.

Scoring System Goals

1. **Automated:** updated by system nightly based on most recent City data with no manual calculation necessary.
2. **Objective:** everyone judged against consistent and factual standard. Reduces room for bias.
3. **Transparent:**
   a) Method for calculating the score is public, and easily understood. Score is posted in publicly accessible online tool called BuildingBlocks.
   b) Allows property managers/owners to determine what properties to focus on to improve score.
   c) Allows prospective property owners (clients) and tenants gauge a property manager's track record.
4. **Enable targeted enforcement:** allow City to focus limited time/resources on lowest scoring entities.
5. **Reward good landlords:** objective score allows potential policies for reduced fees and/or frequency of inspection. Give them a new tool to help market themselves.

Scoring Process Detail

1. **Score every property by the below 4 factors:**

   Note: full detail on each scoring factor provided on page 5

Factor	Max Score	Min Score	To Achieve Max Score	To Achieve Min Score
Open and Expired* Health and Safety Violations Per Unit	30	0	0 H&S violations per unit (open + expired)	5+ H&S violations per unit (open + expired)
Days Since Oldest Open Expired* H&S Violation Was Cited	20	0	0 open H&S violations (open + expired)	365+ days since oldest open H&S expired
Days Since Certificate of Occupancy Expired	30	0	89 days or less expired	270+ days expired
Days Property Has Been Vacant (w 1+ Violation)	20	0	Not vacant	270+ days vacant
TOTAL	100	0	All of the above	All of the above

   *Violation Expired = open for 2 x the # of "response days", # specific to each violation code

2. **Remove "grace period" properties from the pool**
   a. New owner or manager acquired the property in the last 90 days
   b. Additional 6-month extension if issued a building permit in first 90 days AND no immediate hazards
   c. Additional 6-month extension if a work schedule was submitted and approved by Code Enforcement AND no immediate hazards

3. **Link properties to their owners and managers**
   a. The scoring is separate for owners vs manager. An individual may have both a manager and an owner score, and they may be very different scores. This can happen when a manager manages properties for other owners, as well as managing properties they own.
   b. The system automatically links and considers properties to be owned/managed by a common entity if the City's records show the property as sharing a common mailing address, contact information, or when it has matching owner/manager names. They system will account for minor spelling differences.
   c. Owner records will only be linked to owner records. Manager records will only be linked to manager records.

4. **Calculate owner/manager "portfolio score" averages from the remaining properties:**
   a. Weighted average of owned/managed properties by # of units at each property. Larger buildings count more in the average.

b. Weighted average by years since last inspection. More recently inspected properties count more in the average.

Years Since Last Inspection	Weighting
0-1 **Or open violations, or expired CofO**	1
1-2	.66
2-3	.33
3+ **(not included in the average)**	0

c. If an owner or manager only has properties inspected over 3 years ago, take the average of those at full weight.

5. Automatically recalculate score nightly

Property Scoring Detail: Values Corresponding to Score

Health and Safety Violations Per Unit

Open expired* H&S violation count/unit

*Violation Expired =
open for 2 x the # of "response days", the # of days is
specific to each violation code. So a H&S viol could be
expired at 2 days or up to 120 days depending on the viol.

Min Value	Max Value	Score Awarded
0	0	30
0.01	1	25
1.01	2	15
2.01	5	5
5.01+		0

Age of Oldest Open Health and Safety Violation

Days since oldest open H&S viol expired*

0	0	20
1	179	15
180	269	10
270	364	5
365+		0

C of O Status

0	89	30
90	180	20
181	364	10
365+		0

Vacant With Violations

Days since marked vacant

0	0	20
1	59	15
60	269	5
270+		0

Example Property Scoring with Hypothetical Conditions:

Factor	Example Property Conditions	Score Awarded
Open Expired* Health and Safety Violations Per Unit	**(2 expired H&S violation at a 2 unit property) = 1 per unit**	**25**
Days Since Oldest H&S Violation Expired	**5 days since oldest H&S violation expired**	**15**
Days CofO Expired	**10 days expired**	**30**
Days Vacant (w 1+ Violation)	**0 days vacant**	**20**
TOTAL		**90**

Viewing Scores in BuildingBlocks

1. Searching a Property Manager or Owner
    a. **PLEASE NOTE:** the ability to search by owner and manager name is not yet available. To view an owner or manager score, you must search a property address that is associated with them, and then click the address to open the property detail page. You can then click the owner or manager name to open their Identity Page. See search by address instructions below.
    b. Go to https://rochester-ny.tolemi.com/
    c. Click in the search bar at the top center of the main page (see image below)
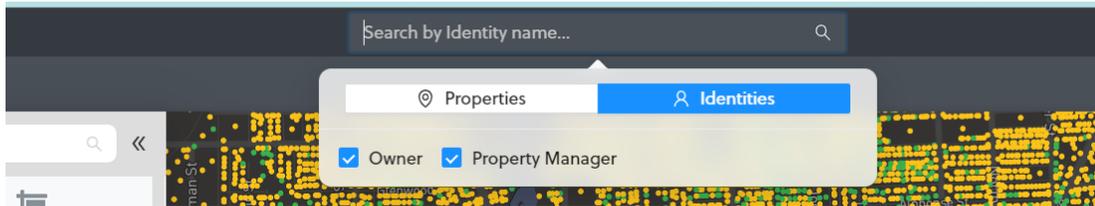
    d. Select "Identities" in the popup. It will highlight in blue. Check the appropriate box(es) below to search for owner, manager, or both.
    e. Type the name of the person or company you want to view
    f. A list of name entities will appear below. Click the name in blue text to go to their identity page and see their score

2. Viewing Identity Page for Owner/Manager
    a. In some cases an individual may be both a manager and an owner, and there is a tab for each role at the top of the screen. You can toggle between them by clicking the blue text "Property Manager" or "Property Owner".
   b. The overall owner/manager score is at the left side of the identity page:

c. Click the colored circle next to the score to open a popup to view the list of properties included in the score calculation, and the individual property scores. The system is averaging the bottom half scoring properties the person/company owns/manages. Click on the "+" symbol next to a property address to expand and see the factors contributing to the property's score. Zero means nothing is being subtracted for that factor.
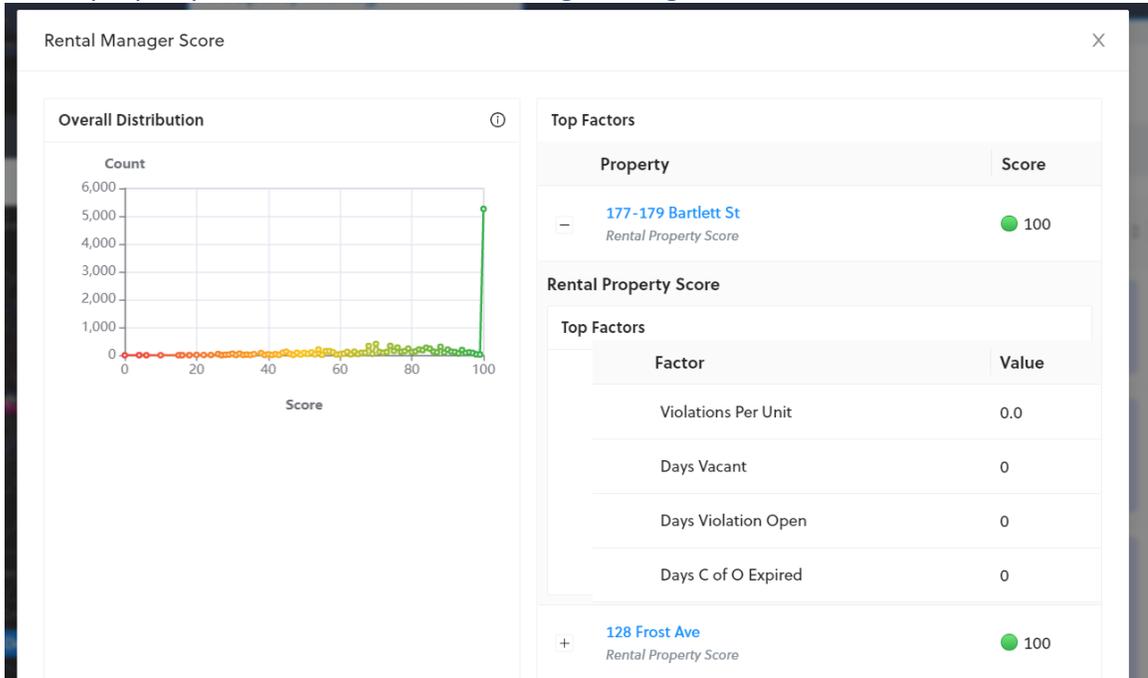
d. Close the popup. You can view ALL owned/managed properties on the main page. Click the column name "Rental Property Score" to sort that column by score, lowest score to the top. For full detail, you can click on the blue number in the "#" column to open the property profile page. There you can view the list of specific violations, CofO status, etc.

3. Reviewing Linked Ownership and Management Groups (on Identity Page)
   a. The system uses an automated algorithm to link different owners/managers using the same tax bill mailing address or other contact info and assumes they share common ownership. This will also help link records with very similar names to account for small typos or omissions. All properties owned/managed by any of the linked identities are included in the overall average score calculation for that owner or manager, and the score is the same for all linked identities. However, owners and manager records are kept separate. Manager records can't be linked to owner records, and vice versa. There is a separate score for manager vs owner, and an individual may have a score for both that may be different.
   b. Back on the manager/owner **identity page**, review the list of properties, and the names in listed in either the "Owner" or the "Manager" column. All of these individuals or entities are linked to you, so that all of their properties are being merged into your portfolio for scoring purposes.
   c. If you feel an identity has been linked to you in error, email CivcsTechSupport@CityofRochester.gov with the list of names and/or properties in question
   d. If you no longer manage a property but it still has your name associated as manager, please ask the owner to contact the City to update the official record. You can also email CodeEnforcement@CityofRochester.gov and request to have your name removed. The City will contact the owner to prompt them to designate a new manager. Owners must designate a new manager whenever there is a change ASAP using the contact above.

   As of August 25th, all legacy property manager records submitted via paper forms before the City implemented its new Infor software system were removed. Only new manager contact records submitted since May 24th, 2023 will be included in the scoring and listed publicly in BuildingBlocks.

4. Searching by Property - Viewing Property Detail Page
   a. The property detail page provides the list of open violations, current property score, permit history, and a plethora of other details.

      You can reach the detail page for a specific property from the Manager/Owner profile, clicking a property SBL# from their property list. See above section.

      Or you can search a property from the main BuildingBlocks landing page:

   b. Return to https://rochester-ny.tolemi.com/
   c. In the search bar at the top of the window, search the property address
   d. Click on the address in the popup:
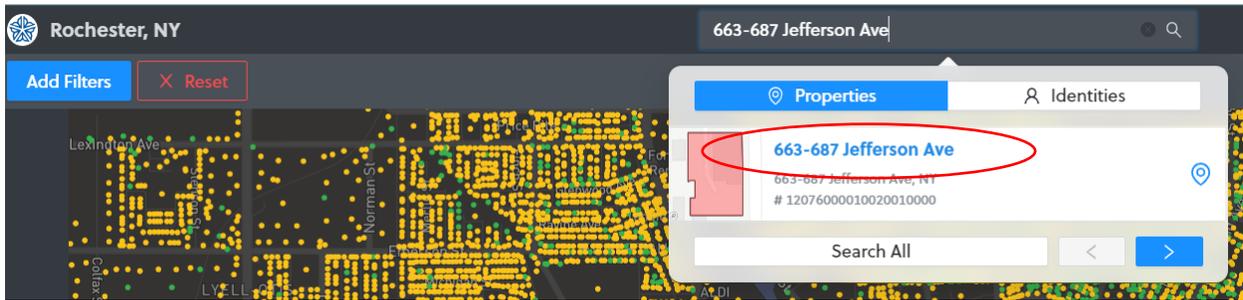
   e. View the property owner's score, and property manager's score on the right side panel. You can jump to their owner/manager profile page by clicking their name in blue.

f. To view this property's score, and list of specific open violations, scroll down to the bottom of the page and find the respective sections. Press the "+" button on the left to expand the section to view it if necessary.

BuildingBlocks Main Page - Map View Filtering

1. Return to https://rochester-ny.tolemi.com/
2. Using the filter tools you can view a map of properties that match certain criteria, such as only viewing those above a certain property score.
3. Click "Add Filters" at the very top left of the page. Find and click the "Scores" section near the bottom. Click Rental Property Score in the popup. Enter the score range you are interested in below in the boxes (example shows properties with score 90+). Hit enter and the map will filter to only show properties matching that filter.
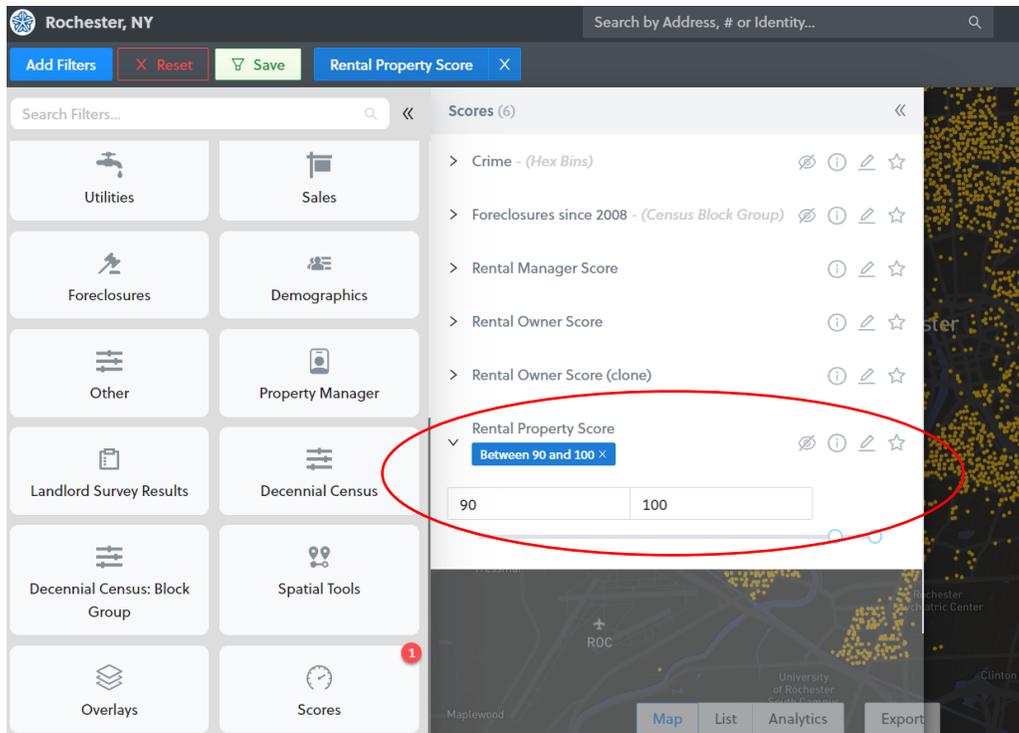
4. You can also filter for properties based on owner's overall avg score across all of their properties. To do this use the filter "Rental Owners Score" and set the range like above.
5. You can combine and add other filters in Code Enforcement, Property Details, or other sections to narrow the pool of properties even further.

Contacts for Questions/Issues

If you need to update the City's records to designate a new property manager, have questions about open violations, or need to schedule an inspection, please email:
CodeEnforcement@CityofRochester.gov

If you need to speak with your code enforcement inspector you can find their contact info here:
https://maps.cityofrochester.gov/portal/apps/webappviewer/index.html?id=b7ccd37b38044e9
3ae724f4a26f5741b

For technical question/issues, please contact: BuildingBlocksIssue@CityofRochester.gov