2022 NMHC/ONE11 ADVISORS
APARTMENT INDUSTRY TECHNOLOGY BENCHMARKING REPORT

SURVEY REPORT MAY 2022
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The information provided herein is general in nature and is not intended to be legal advice. It is designed to assist members in understanding this issue area, but it is not intended to address specific fact circumstances or business situations. For specific legal advice consult your attorney.
ABOUT NMHC

Based in Washington, DC, NMHC is a national association representing the interests of the larger and most prominent apartment firms in the U.S. NMHC's members are the principal officers of firms engaged in all aspects of the apartment industry, including ownership, development, management and financing. NMHC advocates on behalf of rental housing, conducts apartment related research, encourages the exchange of strategic business information and promotes the desirability of apartment living. Nearly one-third of Americans rent their housing, and almost 15 percent live in an apartment (buildings with 5 or more units). For more information, contact NMHC at 202/974-2300, e-mail at info@nmhc.org, or visit NMHC’s Web site at www.nmhc.org

ABOUT ONE11 ADVISORS

One11 Advisors is an integrated professional services firm acquired by Altus Group on July 2, 2019. They provide advisory and managed services for real estate organization’s front to back-office strategies, processes, and technology. Their team of industry experts bring market experience and leverage years of experience to deliver innovative proven solutions to owners, builders, occupiers, and operators of real estate. Their unique team consists of experienced professionals who have successfully worked in leadership positions in the industries we serve and are further strengthened with deep organizational, process and product expertise.
SURVEY OVERVIEW

In partnership with One11 Advisors, the National Multifamily Housing Council (NMHC) conducted a survey of all NMHC member apartment companies from late December of 2021 through March of 2022 seeking input from their company technology leaders. The survey sought to fill a void in information relating to numerous technology related issues that both NMHC and One11 believe would provide valuable insights to both apartment companies and the technology suppliers that support the apartment industry.

As the leading trade association for the larger apartment companies in the U.S., NMHC seeks to assure that the apartment industry is well-positioned to fully reap the benefits of advances in technology and innovation. With seemingly exponential growth in new technologies, such as artificial intelligence, home automation, blockchain and other revolutionary new tech that have the potential to create efficiencies and savings for the industry, NMHC hopes to assure that an ecosystem exists that allows the industry to simply and seamlessly exploit the opportunities provided by existing and exciting new technology and innovation.

An important building block in support of that goal is a baseline understanding of how apartment companies are supporting technology and innovation in their companies, as well as what challenges and opportunities they face as they deploy technology more extensively into company systems.

Seemingly mundane information such as reporting structures may provide valuable insights into how technology is treated at the company level. The role technology professionals play in companies throughout the world of business has evolved. From their initial role as the supporter of company email systems, servers and computers, to key C-Suite players setting and executing company strategy, the job has evolved significantly at companies with the size and resources to support the evolution.

One goal of this survey and other educational efforts is to assist in that evolution by providing data that highlights best practices and allows organizations to evolve their technology capabilities regardless of their size or resources. More specifically, the overall goals for this, the second NMHC-One11 Advisors Technology Survey, are to:

- Provide the apartment industry with basic benchmarks for technology staffing, reporting structure, and the use of contracted employees and consultants.

- Assess how the industry is addressing the recent expansion of innovative new technology products and technology-enabled services and highlight the challenges to adoption of new tech and innovation.

- Assess satisfaction and challenges with existing technology systems.
Determine how effectively the industry is addressing cybersecurity issues.

Gather information on the leading challenges and opportunities that technology professionals are facing today.

In general, the survey hopes to provide a snapshot of the many ways that technology is being addressed at apartment companies of different sizes. It’s hoped that the information will provide a roadmap for all companies to create an internal ecosystem that helps them best take advantage of the opportunities provided by technology while mitigating the risks.

SURVEY METHODOLOGY

As stated above, NMHC sent a digital survey to all its apartment company members seeking information on how they address technology as well as the challenges and opportunities they face in their positions as industry technology leaders.

The survey was created with input from the NMHC member committees, One 11 Advisors and NMHC staff. Responses were received from 60 apartment company technology leaders from an almost equal distribution between small companies (less than 10k units), medium sized companies (10k to 25k units), large companies (25k to 60k units) and very large companies (more than 60k units). In a few instances, more than one person submitted data for a company. In those cases, we accepted the data from the known “Head of IT” and deleted the additional responses. We did notice some survey fatigue due to the length of the survey and will address that in future surveys.

The company size categories were created based upon naturally occurring breaks in the data and through use of the NMHC 50 report as a guide. The range of companies in the NMHC top 50 is from roughly 30k to over 600k at the high end. The mid-point for companies in the list is roughly 50k to 60k. So, if a company made the top 50 list or were roughly just below the cut-off, they were considered a very large or a large company. Companies in the upper half of the list, above 60k units, were considered very large and those between 25k and 60k units were considered large. Using 10k or less for small companies and 10k to 25k for medium was based on natural breaks in the data and a consensus decision from industry professionals.

While quotes from survey respondents are included in the survey report, none are attributed. All data is anonymized and aggregated to preserve the confidentiality of the respondent. The company size categories were created to be large enough to not be able to determine the companies in the profile. No personally identifiable information (PII) from any respondent was disclosed or shared beyond NMHC staff. One11 Advisors only received data without any PII included.
SURVEY RESPONDENT PROFILE

Which of the following would you consider the primary function of your company?

- Third-Party Manager: 17%
- Development/Construction Company: 15%
- Owner/Communities Managed by Third Party: 7%
- Owner/Operator: 62%

What is the size of your organization? (by number of apartment units in your portfolio)

- Very Large (more than 60k units): 25%
- Large (25k to 60k units): 27%
- Medium (10k to 25k units): 22%
- Small (less than 10k units): 27%

Note: Please consider that the company data was sorted by number of apartment units, however a company may have non-multifamily properties as well and while characterized as a small company in the report they may not technically be a “small company”.

Total number of employees (supporting multifamily)

Total number of employees (supported by IT)

Average Number of Employees (supported by IT)

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small (less than 10k units)</td>
<td>96</td>
</tr>
<tr>
<td>Medium (10k to 25k units)</td>
<td>352</td>
</tr>
<tr>
<td>Large (25k to 60k)</td>
<td>1034</td>
</tr>
<tr>
<td>Very Large (more than 60k units)</td>
<td>2251</td>
</tr>
</tbody>
</table>

Average Number of FTE IT Staff

<table>
<thead>
<tr>
<th>Category</th>
<th>Average FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small (less than 10k units)</td>
<td>1.6</td>
</tr>
<tr>
<td>Medium (10k to 25k units)</td>
<td>11.3</td>
</tr>
<tr>
<td>Large (25k to 60k)</td>
<td>22.3</td>
</tr>
<tr>
<td>Very Large (more than 60k units)</td>
<td>26.3</td>
</tr>
</tbody>
</table>
### Average Number of FTE IT Staff/ Average Number of Employees

<table>
<thead>
<tr>
<th>Category</th>
<th>FTE IT Staff/Average Number of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small (less than 10k units)</td>
<td>0.016</td>
</tr>
<tr>
<td>Medium (10k to 25k units)</td>
<td>0.032</td>
</tr>
<tr>
<td>Large (25k to 60k)</td>
<td>0.022</td>
</tr>
<tr>
<td>Very Large (more than 60k units)</td>
<td>0.012</td>
</tr>
</tbody>
</table>

### What percentage of your employees are located onsite? (in apartment communities)

- Less than 10%: 14%
- 10% to 49%: 10%
- 50% to 74%: 12%
- 75% to 100%: 64%

### What percentage of your employees are corporate resources? (i.e. overhead)

- Less than 15%: 20%
- 15% to 29%: 59%
- 30% to 44%: 7%
- 45% to 59%: 2%
- 60% to 100%: 11%
Average number of acquisitions and dispositions executed in a given year

<table>
<thead>
<tr>
<th>Range</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Less than 10</td>
<td>36%</td>
</tr>
<tr>
<td>10 to 29</td>
<td>42%</td>
</tr>
<tr>
<td>30 to 49</td>
<td>11%</td>
</tr>
<tr>
<td>40 to 69</td>
<td>4%</td>
</tr>
<tr>
<td>50 to 69</td>
<td>2%</td>
</tr>
<tr>
<td>More than 90</td>
<td>5%</td>
</tr>
<tr>
<td>70 to 89</td>
<td>2%</td>
</tr>
</tbody>
</table>
I.T. FUNDING

What is your IT expense as a percent of total revenue? (divide total IT expense budget for 2021 by actual revenue for your organization in 2020)

Note: Only 33 respondents answered this question, the rest said either they didn’t know or they preferred not to divulge.
How does your company fund your enterprise operating software? (general ledger, property management, revenue management, other ancillaries)

- IT pays for all software and is part of the IT budget: 19%
- Software is allocated out of each business unit and is not part of the IT budget: 28%
- A hybrid of the above: 51%
- Other: 2%
How does your company fund your desktop software? (O365, Windows, etc.)

- **IT pays for all software and is part of the IT budget**: 19%
- **Software is allocated out of each business unit and is not part of the IT budget**: 28%
- **A hybrid of the above**: 51%
- **Other**: 2%

How does your company fund your cybersecurity programs? (AV malware, internet filtering, SIEM, intrusion detection)

- **IT pays for all software and is part of the IT budget**: 44%
- **Software is allocated out of each business unit and is not part of the IT budget**: 12%
- **A hybrid of the above**: 40%
- **Other**: 4%
I.T. ORGANIZATIONAL STRUCTURE

What is the title of the “Head of IT” at your company?

Chief Information Officer/Chief Technology Officer (CIO/CTO) 37%
Vice President 24%
No in-house head of IT 4%
Other 10%
Director 12%
Senior Vice President 14%

What is the title of the “Head of IT” at your company? (very large companies)

Chief Information Officer/Chief Technology Officer (CIO/CTO) 57%
Senior Vice President 21%
Vice President 20%
Director 7%

What is the title of the “Head of IT” at your company? (large companies)

Chief Information Officer/Chief Technology Officer (CIO/CTO) 47%
Senior Vice President 27%
Vice President 20%
Director 7%
What is the title of the “Head of IT” at your company? (medium companies)

- Chief Information Officer/Chief Technology Officer (CIO/CTO): 45%
- Vice President: 27%
- Director: 18%
- Other: 9%

What is the title of the “Head of IT” at your company? (small companies)

- Chief Information Officer/Chief Technology Officer (CIO/CTO): 40%
- Senior Vice President: 20%
- Director: 10%
- Other: 10%
- No in-house head of IT: 10%

To whom does your “Head of IT” directly report?

- Chief Executive Officer: 35%
- Chief Operating Officer: 25%
- Chief Financial Officer: 25%
- Chief Administrative Officer: 6%
- Other: 10%
To whom does your “Head of IT” directly report? (very large companies)

- Chief Administrative Officer: 7%
- Chief Executive Officer: 50%
- Chief Financial Officer: 21%
- Chief Operating Officer: 21%
- Other: 13%

To whom does your “Head of IT” directly report? (large companies)

- Chief Executive Officer: 53%
- Chief Financial Officer: 33%
- Chief Operating Officer: 10%
- Other: 7%

To whom does your “Head of IT” directly report? (medium companies)

- Chief Administrative Officer: 18%
- Chief Executive Officer: 9%
- Chief Financial Officer: 27%
- Chief Operating Officer: 18%
- Other: 20%

To whom does your “Head of IT” directly report? (small companies)

- Chief Administrative Officer: 10%
- Chief Executive Officer: 10%
- Chief Financial Officer: 10%
- Chief Operating Officer: 20%
- Other: 50%
I.T. STAFFING AND CORE FUNCTIONS

How many dedicated IT full time employees (FTEs) report to your “Head of IT”? (include partial FTEs if needed, i.e. 2.5)

Average Number of FTEs Reporting to Head of IT by Company Size

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Average Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Large Companies</td>
<td>26.3</td>
</tr>
<tr>
<td>Large Companies</td>
<td>22.3</td>
</tr>
<tr>
<td>Medium Companies</td>
<td>11.3</td>
</tr>
<tr>
<td>Small Companies</td>
<td>1.6</td>
</tr>
</tbody>
</table>
Business Functions for which “Head of IT” has Oversight and Accountability (response count listed after bar)
Business Functions for Which “Head of IT” has Oversight and Accountability
(small companies)

- Desktop Support
- Hardware Procurement
- Desktop Imaging/Patching
- Enterprise Software System Admin
- Network Engineering
- Enterprise Software Support
- Cybersecurity
- Software Training
- Data Center Maintenance
- Server Administration/Patching
- Telecom Management
- User Provisioning
- Project Management (PMO)
- Business Intelligence/Data Analytics
- Smart Home Technology
- Accounting/Finance
- Ancillary Income
- Marketing (Digital and Traditional)
- Human Resources

Business Functions Primarily Serviced with In-house Resources

- Enterprise Software System Admin
- Project Management (PMO)
- Enterprise Software Support
- Business Intelligence/Data Analytics
- Infrastructure
- Hardware Procurement
- Desktop Support
- User Provisioning
- Desktop Imaging/Patching
- Network Engineering
- Cybersecurity
- Telecom Network Support
- Server Administration/Patching
- Data Center Maintenance
- Telecom Expense/Contract Management
- Applications Development
How many internal IT FTEs are allocated across the following core IT functions?

<table>
<thead>
<tr>
<th></th>
<th>0.25 to 1</th>
<th>1.5 to 2</th>
<th>2.5 to 3</th>
<th>3.5 to 4</th>
<th>4.5 to 5</th>
<th>5.5 to 6</th>
<th>6.5 to 7</th>
<th>7.5 to 8</th>
<th>8.5 to 9</th>
<th>9.5 to 10</th>
<th>10 to 15</th>
<th>16 to 20</th>
<th>More than 25</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>36%</td>
<td>27%</td>
<td>7%</td>
<td>10%</td>
<td>0%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
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<td>2%</td>
<td>5%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Network Management</td>
<td>38%</td>
<td>33%</td>
<td>10%</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
<td>0%</td>
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<tr>
<td>Cybersecurity</td>
<td>57%</td>
<td>14%</td>
<td>14%</td>
<td>6%</td>
<td>3%</td>
<td>3%</td>
<td>0%</td>
<td>3%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Enterprise Software</td>
<td>33%</td>
<td>12%</td>
<td>5%</td>
<td>9%</td>
<td>12%</td>
<td>2%</td>
<td>2%</td>
<td>7%</td>
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<td>2%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Desktop Support</td>
<td>16%</td>
<td>24%</td>
<td>11%</td>
<td>11%</td>
<td>3%</td>
<td>5%</td>
<td>5%</td>
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</tr>
<tr>
<td>Cybersecurity</td>
<td>48%</td>
<td>17%</td>
<td>14%</td>
<td>7%</td>
<td>3%</td>
<td>0%</td>
<td>7%</td>
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<td>0%</td>
<td>3%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Note: Percentages are percent of total responses for that function, not total responses (Ex. 48% of the respondents who have staff for BI have 1 or less)

How many internal IT FTEs are allocated across the following core IT functions? (very large companies)

<table>
<thead>
<tr>
<th></th>
<th>0.25 to 1</th>
<th>1.5 to 2</th>
<th>2.5 to 3</th>
<th>3.5 to 4</th>
<th>4.5 to 5</th>
<th>5.5 to 6</th>
<th>6.5 to 7</th>
<th>7.5 to 8</th>
<th>8.5 to 9</th>
<th>9.5 to 10</th>
<th>10 to 15</th>
<th>16 to 20</th>
<th>More than 25</th>
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</thead>
<tbody>
<tr>
<td>Management</td>
<td>5%</td>
<td>63%</td>
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<td>5%</td>
<td>5%</td>
<td>0%</td>
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<td>5%</td>
<td>0%</td>
<td>5%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Network Management</td>
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<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
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<td>0%</td>
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<td>8%</td>
</tr>
<tr>
<td>Cybersecurity</td>
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<td>17%</td>
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<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Enterprise Software</td>
<td>15%</td>
<td>15%</td>
<td>0%</td>
<td>8%</td>
<td>15%</td>
<td>0%</td>
<td>0%</td>
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<td>0%</td>
<td>0%</td>
<td>0%</td>
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<td>15%</td>
</tr>
<tr>
<td>Desktop Support</td>
<td>8%</td>
<td>23%</td>
<td>15%</td>
<td>8%</td>
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<td>8%</td>
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<tr>
<td>Cybersecurity</td>
<td>14%</td>
<td>14%</td>
<td>29%</td>
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<td>0%</td>
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<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Note: Percentages are percent of total responses for that function, not total responses

How many internal IT FTEs are allocated across the following core IT functions? (large companies)

<table>
<thead>
<tr>
<th></th>
<th>0.25 to 1</th>
<th>1.5 to 2</th>
<th>2.5 to 3</th>
<th>3.5 to 4</th>
<th>4.5 to 5</th>
<th>5.5 to 6</th>
<th>6.5 to 7</th>
<th>7.5 to 8</th>
<th>8.5 to 9</th>
<th>9.5 to 10</th>
<th>10 to 15</th>
<th>16 to 20</th>
<th>More than 25</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>31%</td>
<td>15%</td>
<td>8%</td>
<td>23%</td>
<td>0%</td>
<td>0%</td>
<td>8%</td>
<td>0%</td>
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<td>0%</td>
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</tr>
<tr>
<td>Network Management</td>
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<td>8%</td>
<td>0%</td>
<td>8%</td>
<td>0%</td>
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</tr>
<tr>
<td>Cybersecurity</td>
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<td>18%</td>
<td>27%</td>
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<td>9%</td>
<td>0%</td>
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<tr>
<td>Enterprise Software</td>
<td>8%</td>
<td>8%</td>
<td>0%</td>
<td>23%</td>
<td>15%</td>
<td>8%</td>
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<td>8%</td>
<td>8%</td>
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</tr>
<tr>
<td>Desktop Support</td>
<td>0%</td>
<td>25%</td>
<td>17%</td>
<td>17%</td>
<td>8%</td>
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<tr>
<td>Cybersecurity</td>
<td>33%</td>
<td>22%</td>
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<td>0%</td>
<td>0%</td>
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</tbody>
</table>

Note: Percentages are percent of total responses for that function, not total responses
### How many internal IT FTEs are allocated across the following core IT functions? (medium companies)

<table>
<thead>
<tr>
<th>Function</th>
<th>0.25 to 1</th>
<th>1.5 to 2</th>
<th>2.5 to 3</th>
<th>3.5 to 4</th>
<th>4.5 to 5</th>
<th>5.5 to 6</th>
<th>6.5 to 7</th>
<th>7.5 to 8</th>
<th>8.5 to 9</th>
<th>9.5 to 10</th>
<th>10 to 15</th>
<th>16 to 20</th>
<th>More than 25</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>44%</td>
<td>33%</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>11%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Network Management</td>
<td>29%</td>
<td>29%</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Cybersecurity</td>
<td>67%</td>
<td>17%</td>
<td>17%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Enterprise Software Support</td>
<td>50%</td>
<td>20%</td>
<td>10%</td>
<td>0%</td>
<td>10%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Desktop Support</td>
<td>29%</td>
<td>14%</td>
<td>0%</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Cybersecurity</td>
<td>60%</td>
<td>20%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>20%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Note: Percentages are percent of total responses for that function, not total responses.

### How many internal IT FTEs are allocated across the following core IT functions? (small companies)

<table>
<thead>
<tr>
<th>Function</th>
<th>0.25 to 1</th>
<th>1.5 to 2</th>
<th>2.5 to 3</th>
<th>3.5 to 4</th>
<th>4.5 to 5</th>
<th>5.5 to 6</th>
<th>6.5 to 7</th>
<th>7.5 to 8</th>
<th>8.5 to 9</th>
<th>9.5 to 10</th>
<th>10 to 15</th>
<th>16 to 20</th>
<th>More than 25</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Network Management</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Cybersecurity</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Enterprise Software Support</td>
<td>86%</td>
<td>0%</td>
<td>14%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Desktop Support</td>
<td>60%</td>
<td>40%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Cybersecurity</td>
<td>88%</td>
<td>13%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

Note: Percentages are percent of total responses for that function, not total responses.
If your organization received the funding and approval to hire more internal IT resources, how many additional FTEs would it attempt to hire?

**Average FTE Deficit**

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Average FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Large Companies</td>
<td>3.7 FTE</td>
</tr>
<tr>
<td>Large Companies</td>
<td>1.6 FTE</td>
</tr>
<tr>
<td>Medium Companies</td>
<td>2.9 FTE</td>
</tr>
<tr>
<td>Small Companies</td>
<td>1.5 FTE</td>
</tr>
</tbody>
</table>

If you received funding and approval, how many additional FTEs would you hire?

- **Very Large Companies**
  - None: 30%
  - Three: 20%
  - Six to ten: 30%
  - Five: 20%

- **Large Companies**
  - None: 25%
  - Three: 25%
  - One: 17%
  - Two: 8%
  - Six to ten: 25%
  - Four: 25%
If you received funding and approval, how many additional FTEs would you hire?

(medium companies)

- One: 11%
- Two: 11%
- Three: 11%
- Six to ten: 67%

(small companies)

- None: 67%
- One: 16%
- Two: 17%

Percent of IT capacity spent “Fighting Fires” versus proactively moving the industry forward:

- 10 to 19%: 19%
- 20 to 29%: 16%
- 30 to 39%: 7%
- 40 to 49%: 9%
- 50 to 59%: 5%
- 60 to 69%: 5%
- 70 to 79%: 5%
- 80 to 89%: 7%
- 90 to 100%: 2%
Percent of IT Capacity Spent “Fighting Fires”

- **Very large companies:**
  - 20 to 29%
  - 40 to 49%
  - 50 to 59%
  - 60 to 69%

- **Large companies:**
  - 20 to 29%
  - 40 to 49%
  - 50 to 59%
  - 60 to 69%

- **Medium companies:**
  - 20 to 29%
  - 30 to 39%
  - 50 to 59%
  - 70 to 79%

- **Small companies:**
  - 20 to 29%
  - 30 to 39%
  - 50 to 59%
  - 60 to 69%

Note: The converse of these numbers are “proactively moving the organization forward”
Percent of IT Capacity Spent on Proactively Moving Organization Forward

Average Percent of IT Capacity Spent on Proactively Moving Organization Forward

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Large Companies</td>
<td>40%</td>
</tr>
<tr>
<td>Large Companies</td>
<td>36%</td>
</tr>
<tr>
<td>Medium Companies</td>
<td>34%</td>
</tr>
<tr>
<td>Small Companies</td>
<td>50%</td>
</tr>
</tbody>
</table>
I.T. OUTSOURCING

Business Functions Primarily Serviced by Outsourcing, Contractors, or Consultants

- Cybersecurity
- Telecom Expense/Contract Management
- Server Administration/Patching
- Telecom Network Support
- Data Center Maintenance
- Network Engineering
- Desktop Support
- Desktop Imaging/Patching
- Enterprise Software Support
- Applications Development
- Hardware Procurement
- Infrastructure
- User Provisioning
- Enterprise Software System Admin
- Business Intelligence/Data Analytics
- Project Management (PMO)

Top Reasons for Using Third Parties for Core IT Functions

- Don't have the skills internally
- Keep IT payroll costs low
- Other
- Can't afford the skills internally
- Temporary need
- None of the above
Other Reasons Mentioned

- Password resets, other simple tasks that are easily and quickly managed by a 3rd party
- Supplemental cyber coverage 24/7
- Able to scale quickly based on needs
- They can do it better than we can.
- 3rd party specialists are more current on emerging issues and needs and have a larger pool of skilled professionals
- Trouble finding resources with the correct skills
- Scalability for growth
- Large Company, do not have a full IT team
- Unable to source talent currently
- More easily billable to properties vs. taking on the overhead.
- Expertise stronger outsourced
- Not full time jobs, better to outsource

On average, how many hours per week do you use contractors? (specify 0 for none) (by number of responses)
Average Hours per Week Contractors Used (very large companies)

- 0 hours per week: 4
- 30 to 49 hours per week: 4
- 1 to 9 hours per week: 3
- 10 to 29 hours per week: 1
- 50 to 99 hours: 1

Average Hours per Week Contractors Used (large companies)

- 1 to 9 hours per week: 4
- 0 hours per week: 1
- 30 to 49 hours per week: 1
- 50 to 99 hours: 1
- 600 to 800 hours per week: 1
- 300 to 600 hours per week: 1
- 100 to 300 hours per week: 1

Average Hours per Week Contractors Used (medium companies)

- 1 to 9 hours per week: 4
- 10 to 29 hours per week: 2
- 50 to 99 hours: 2
- 0 hours per week: 1

Average Hours per Week Contractors Used (small companies)

- 10 to 29 hours per week: 5
- 0 hours per week: 2
- 1 to 9 hours per week: 1
# Accounting and Property Management Systems

Which best describes your portfolio general ledger/property management software structure? (by number of responses)

<table>
<thead>
<tr>
<th>Structure Description</th>
<th>Very Large Companies</th>
<th>Large Companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Single-Stack Solution for All Development, Ops, and Financial Business Processes</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>One Best of Breed Solution for All Development, Ops, and Financial Business Processes</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Multiple Single-Stack Solutions Driven by Third-Party Clients multiple PMS Platforms</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Multiple Best of Breed Solutions Driven by Third-Party Clients</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>
General Ledger/ PMS Structure (medium companies)

- One Single-Stack Solution for All Development, Ops, and Financial Business Processes: 4
- One Best of Breed Solution for All Development, Ops, and Financial Business Processes Platform: 4
- Multiple Single-Stack Solutions Driven by Third-Party Clients: 1
- Multiple Best of Breed Solutions Driven by Third-Party Clients: 1

General Ledger/ PMS Structure (small companies)

- One Single-Stack Solution for All Development, Ops, and Financial Business Processes: 5
- One Best of Breed Solution for All Development, Ops, and Financial Business Processes Platform: 2

What is your general ledger system of record? (by number of responses)

- MRI: 2
- Oracle: 2
- PeopleSoft: 2
- JDE: 3
- Other: 3
- RealPage: 5
- Yardi: 26
What are the top 3 strengths of your general ledger solution? (by number of responses)

<table>
<thead>
<tr>
<th>Strength</th>
<th>Number of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Availability</td>
<td>20</td>
</tr>
<tr>
<td>Ease of Use/Intuitiveness</td>
<td>14</td>
</tr>
<tr>
<td>Breadth of Solutions Available</td>
<td>14</td>
</tr>
<tr>
<td>Uptime/System Responsiveness</td>
<td>12</td>
</tr>
<tr>
<td>Support/Partnership</td>
<td>12</td>
</tr>
<tr>
<td>Integration with Other Platforms</td>
<td>12</td>
</tr>
<tr>
<td>Ongoing Costs</td>
<td>10</td>
</tr>
<tr>
<td>None of the Above</td>
<td>6</td>
</tr>
<tr>
<td>Set Up Costs</td>
<td>2</td>
</tr>
<tr>
<td>Vision for the Future/Innovation</td>
<td>1</td>
</tr>
</tbody>
</table>

Strengths not mentioned:

- Robust solution that is well recognized as a standard system in the industry
- Solid Core Platform
- Support capability (refresh databases on demand, full SQL access, download nightly copies)
- Custom report capabilities
What are the top 3 areas for improvement of your general ledger solution? (by number of responses)

<table>
<thead>
<tr>
<th>Area</th>
<th>Number of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision for the Future/Innovation</td>
<td>21</td>
</tr>
<tr>
<td>Integration with Other Platforms</td>
<td>18</td>
</tr>
<tr>
<td>Support/Partnership</td>
<td>15</td>
</tr>
<tr>
<td>Ease of Use/Intuitiveness</td>
<td>14</td>
</tr>
<tr>
<td>Ongoing Costs</td>
<td>11</td>
</tr>
<tr>
<td>Uptime/System Responsiveness</td>
<td>6</td>
</tr>
<tr>
<td>Set Up Costs</td>
<td>6</td>
</tr>
<tr>
<td>Breadth of Solutions</td>
<td>5</td>
</tr>
<tr>
<td>None of the Above</td>
<td>5</td>
</tr>
<tr>
<td>Data Availability</td>
<td>5</td>
</tr>
<tr>
<td>None of the Above</td>
<td>5</td>
</tr>
<tr>
<td>None of the Above</td>
<td>5</td>
</tr>
<tr>
<td>None of the Above</td>
<td>5</td>
</tr>
<tr>
<td>None of the Above</td>
<td>5</td>
</tr>
</tbody>
</table>

Other areas for improvement mentioned:

- Job cost details
- Normalization across the various modules/products
- They attempt to do everything roll out the next solution and the last generation of new products don't seem to be fully developed
- Inability to quickly update and support core products is a major hinderance
Please tell us what system(s) are used to facilitate your property management processes? (by number of responses)

Other Responses:
- Aptexx, Sightplan
- Funnel, Sightplan
- Mostly Yardi and RealPage used by our 3rd party PMCs
- Encasa
What are the top 3 strengths of your property management software (PMS) solution? (by number of responses)

**Other responses:**

- Ability to customize to meet our business strategy/needs
- Integrated Learning Management System with strong product training
- Robust solution that is well recognized as a standard system in the industry
- Total market share
What are the top 3 areas for improvement of your property management software (PMS) solution?

Other Responses:
- Integration within the modules of Yardi
- Normalization across the various modules/products
- Piloting fully on-line lease creation process driven by applicant
IMPLEMENTING NEW TECHNOLOGY

Does your organization have a centralized committee responsible for governance of key innovation and/or IT activities? (aka “Innovation Council”)

Yes

No

No - but are planning to start one very soon

Very large companies

Large companies

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No - but are planning to start one very soon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very large companies</td>
<td>75%</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>Large companies</td>
<td>54%</td>
<td></td>
<td>23%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>No - but are planning to start one very soon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very large companies</td>
<td>64%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Large companies</td>
<td>54%</td>
<td>23%</td>
<td>23%</td>
</tr>
</tbody>
</table>
What role does IT play within the innovative new technology team?

- Chair - Runs the Show: 41%
- Member - Chaired by the business but IT is at the table with significant input: 43%
- Advisor - IT is not part of the committee and consulted on an “as needed” basis: 10%
- None of the Above: 3%
Do you have staff dedicated to innovation/vetting new technology?

- 27% We have dedicated staff and a single “owner” of innovation/vetting new technology
- 73% No one is dedicated. We all share the responsibility

To whom does the single “owner” of innovation report to?

- 42% Chief Information/Technology Officer (CIO/CTO)
- 25% Head of IT
- 17% Chief Operating Officer (COO)
- 17% Other - Please Specify
What are the top 3 barriers to your organization for effectively implementing new technology opportunities? (by number of responses)

**Top Barriers to Implementing New Technology (very large companies)**

- Adaptation to Change from Internal Associates: 7
- Not Enough Resources Focused on Innovation: 6
- Finding the Right Solutions(s) to Implement: 5
- Unrealistic Implementation Expectations for Time and ROI: 5
- Not Enough Funding from Business: 5
- Finding the Right Partner(s) for Implementation: 3

**Top Barriers to Implementing New Technology (large companies)**

- Adaptation to Change from Internal Associates: 11
- Not Enough Resources Focused on Innovation: 9
- Finding the Right Solutions(s) to Implement: 7
- Finding the Right Partner(s) for Implementation: 6
- Unrealistic Implementation Expectations for Time and ROI: 3
- Not Enough Funding from Business: 2
Top Barriers to Implementing New Technology (medium companies)

- Adaptation to Change from Internal Associates: 10
- Finding the Right Solutions(s) to Implement: 8
- Finding the Right Partner(s) for Implementation: 5
- Not Enough Funding from Business: 3
- Not Enough Resources Focused on Innovation: 2
- Unrealistic Implementation Expectations for Time and ROI: 2

Top Barriers to Implementing New Technology (small companies)

- Finding the Right Solutions(s) to Implement: 6
- Not Enough Resources Focused on Innovation: 3
- Unrealistic Implementation Expectations for Time and ROI: 3
- Finding the Right Partner(s) for Implementation: 2
- Not Enough Funding from Business: 2
- Adaptation to Change from Internal Associates: 1

What innovative new technologies did your organization implemented in 2021?

- API integration/PaaS
- Asana
- Automated Building and Unit Access - Chirp CRM, Marketing Automation, & Virtual Leasing Agent - Funnel
- Business and Network Automation using power platform BI
- Business Intelligence PowerBI Power Automate - Process improvement application development
- Community WiFi
- CRM ChatIQ
- CRM New Resident Portal Smart Rent (continued from 2020) ChatBot Deposit Alternative
- CRM, AI, SmartHome, Service Mobility

Defined as "Innovative", industry game-changers?
What innovative new technologies did your organization implemented in 2021? (cont.)

Deposit alternatives; ID verification; resident rewards programs; area sensors; smart unit tech; resident loans

Entire cloud hosted phone solution tied to AD/SSO allowing elimination of desk phones

Funnel CRM/Leasing (co development w/ vendor) Sightplan mobile maintenance Smartrent access security/home automation Engrain 3d mapping Markerr data analytics

Microsoft Sharepoint Microsoft Teams Microsoft Power BI

New CRM tools Self Guided Tours Org-wide project management platforms

PowerBI Multifamily Dashboard; re4lQ for underwriting

Proprietary Data - Web based innovations

RentCafe (on line application) RightSource (third Party Compliance) Retail Payments (Walk in payments) Microsoft 365/TEAMS

Resident Rewards Programs Security Deposit Alternatives Flexible Rent Payment Solutions

RPA

Salesforce CRM

SharePoint Orion BI O365 Migration

Smart Home Tech Managed Community-Wide Wifi / Internet

smart home technology

Smart home technology, Sharepoint Document Management, Power BI, Intranet

Smart home, access, bulk internet, Bilt

Smart homes

Snowflake, SIEM, User provisioning automation, Lease automation, New Employee Onboarding process automation

Software

Text/Chat/Voice Bots Ubiquitous Wifi SmartHome RPA Internally developed operating platform

Utilizing bulk internet

We focused heavily on cybersecurity efforts. Implemented EDR and immutable data storage protection.

Yardi
What innovative new technologies does your organization plan to implement in 2022?

<table>
<thead>
<tr>
<th>Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional customer self service, SD Alternatives, SGT</td>
</tr>
<tr>
<td>AI bots; self guided tours; resident credit reporting</td>
</tr>
<tr>
<td>Artificial Intelligence Self-guided Tours Streamline online leasing</td>
</tr>
<tr>
<td>Resident Experience / Apps</td>
</tr>
<tr>
<td>Business intelligence</td>
</tr>
<tr>
<td>Cloud native identity</td>
</tr>
<tr>
<td>Community WiFi</td>
</tr>
<tr>
<td>Continue Yardi Data warehouse Knack</td>
</tr>
<tr>
<td>Continued implementation of 2021 initiatives Funnel on-line leasing</td>
</tr>
<tr>
<td>Ubiquitous Wifi Measurabl ESG data management</td>
</tr>
<tr>
<td>CRM, Chatbot, Property Gig Wi-Fi, Smart Home pilot</td>
</tr>
<tr>
<td>Customer focused website and Online Leasing</td>
</tr>
<tr>
<td>Deeper BI, community wide WiFi</td>
</tr>
<tr>
<td>Defined as &quot;Innovative&quot;. industry game-changers?</td>
</tr>
<tr>
<td>Development in Teams Development in BI (Microsoft Power BI)</td>
</tr>
<tr>
<td>Fully 100% cloud based file sharing with strict Cyber Security controls</td>
</tr>
<tr>
<td>and governance</td>
</tr>
<tr>
<td>Maintenance Call center (third party) Implemented Third party IT all sites</td>
</tr>
<tr>
<td>contract Rent Cafe (online leasing &amp; Work Orders)</td>
</tr>
<tr>
<td>Mobile device management</td>
</tr>
<tr>
<td>More automation Advance Reporting Owner/Asset management Portals with</td>
</tr>
<tr>
<td>dashboards and reporting</td>
</tr>
<tr>
<td>More self-guided options, BI, budgeting</td>
</tr>
<tr>
<td>New application and approval process Revenue Management implementation</td>
</tr>
<tr>
<td>New BI tools</td>
</tr>
<tr>
<td>Office 365</td>
</tr>
<tr>
<td>Proprietary Data - Web based innovations</td>
</tr>
<tr>
<td>Reporting software</td>
</tr>
<tr>
<td>Resident Amenity Network Infrastructure Architecture</td>
</tr>
<tr>
<td>Same as above</td>
</tr>
<tr>
<td>Self Guided tours Automation and centralization</td>
</tr>
<tr>
<td>Sightplan, Data Warehouse, Sustainability/ESG Reporting &amp; Tools, Smart</td>
</tr>
<tr>
<td>home, access, bulk internet, Bilt</td>
</tr>
<tr>
<td>SmartRent, Aerwave, Yardi full stack</td>
</tr>
<tr>
<td>Ubiquitous Wifi Additional enhancements to operating platform</td>
</tr>
<tr>
<td>Upgraded Telecom Cybersecurity MFA</td>
</tr>
</tbody>
</table>
Preferred approach to providing your residents with stable and responsive Wi-Fi?

<table>
<thead>
<tr>
<th>Approach</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managed common area Wi-Fi provided by a single third-party</td>
<td>57%</td>
</tr>
<tr>
<td>Locally sourced common area Wi-Fi managed by internal resources</td>
<td>36%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
</tbody>
</table>

What other approaches have you deployed to manage connectivity?

- Bulk internet (2 mentions)
- Cell coverage extenders
- Deployed Cisco Merki web portal
- Gateway controls managed centrally
- Internal Wi-Fi
- Managed access from third parties
- Managed Community-Wide Wi-Fi with a single provider (bulk) for new developments
- Management office Guest Wi-Fi access
- Unmanaged common area Wi-Fi from third parties
- Partnerships with national cellular companies to provide and manage Wi-Fi
- Property wide managed Wi-Fi
- Redundant Internet
- Redundant near-microwave arrays between buildings
- Redundant fiber vendors
- Testing Gigstreem ubiquitous Wi-Fi solution
- Various, but local provider is the most stable
- We do not offer Wi-Fi to residents so falls on telecommunications provider in area
- Will do more property wide Wi-Fi going forward
- Adding provider to existing properties with only one existing provider or with internet issues
- Wi-Fi 6 implementations
What is your organizational approach to utilizing mobile devices at the site level? (by number of responses)

- Deployed to all or most site teams: 31
- Planning to deploy: 4
- In the process of deployment: 5
- No plans to deploy: 5

Very large companies:
- Deployed to all or most site teams: 8
- In the process of deployment: 3
- No plans to deploy: 1

Large companies:
- Deployed to all or most site teams: 9
- In the process of deployment: 2
- No plans to deploy: 1
- Planning to deploy: 1
What is your organizational approach to funding mobile devices? (by number of responses)

- **Deployed to all or most site teams**
- **In the process of deployment**
- **No plans to deploy**
- **Planning to deploy**

**Medium companies**
- Deployed to all or most site teams: 8
- In the process of deployment: 1
- No plans to deploy: 1
- Planning to deploy: 1

**Small companies**
- Deployed to all or most site teams: 6
- In the process of deployment: 2
- No plans to deploy: 1
- Planning to deploy: 1

**Other responses:**
- **BYOD**
  California associates are reimbursed, all onsite associates receive a monthly stipend, some corporate associates receive a stipend - based on requirement of position
- **Funded for site personnel; BYOD for all other personnel**
- **Hybrid, Health care is corp funded (hippa tracker) all other are on a Stipend**
- **Site specific**
- **Varies by position**
OTHER TECH SOLUTIONS

What solution(s) do you have in place for budgeting? (by number of responses)
(all questions in this section were open-ended)

What solution(s) do you have in place for business intelligence or custom reporting?
(by number of responses)
What solution(s) do you have in place for work orders, service delivery, unit inspections, due diligence and/or renovation CapEx tracking? (by number of responses)

![Bar chart showing the number of responses for different solutions.]

What solution(s) do you have in place for managing packages? (package software, package lockers or rooms) (by number of responses)

![Bar chart showing the number of responses for different package management solutions.]