

MANAGEMENT/MAINTENANCE PLAN OUTLINE

The Management Agent must define how they intend to operate the development successfully for initial lease up and/or on-going stabilization. The following list of items need to be addressed in your Management/Maintenance Plan, a detailed outline procedure is attached for your convenience.

1. Responsibility of Management Agent
2. Staffing positions and responsibilities
3. Resident Selection and Eligibility Procedures
4. Leasing and Occupancy Policies
5. Resident – Management Relations
6. Enforcement of Leases
7. Accounting and Record keeping
8. Reporting Requirements
9. Social Service Requirements (if applicable)
10. Maintenance Procedures
11. Vacancy and Occupancy Procedures
12. Accessibility for disabled/handicap
13. Management of Common Use Units
14. Office Hours

A detailed outline of procedures follows:

DETAILED OUTLINE PROCEDURES

1. Responsibility of Management Agent

- A. Standard of Conduct
- B. Goals
- C. Property information (Total units, unit size)
- D. Operations
 - a. Occupancy reporting
 - b. Office Hours
 - c. Licenses and Permits
 - d. Marketing
 - e. Lease up or stabilization standards
 - f. Grievance Policy
 - g. Emergency Procedures
- E. Accounting
 - a. Rent collections
 - b. Vendor information
 - c. Insurance, Taxes and budgets
 - d. Disbursement and balances for accounts
 - e. Employee information
- F. Compliance Monitoring and Reporting
 - a. Physical
 - b. File
 - c. Occupancy

2. Staffing

- A. Employee Policy
 - a. On-site Management
 - b. On-site Maintenance
 - c. On-site Security
 - d. On-site Grounds
- B. Training and Certificates Required
- C. Training Opportunities
- D. Experience required
- E. Duties and responsibilities
- F. Hours – Full or Part time

3. Resident Selection and Eligibility Procedures

Resident Selection Guidelines

- A. Application Process
- B. Occupancy standards
- C. Screening standards
- D. Income Requirements
- E. Resident eligibility requirements
- F. Waiting List Procedures
- G. Manager, Maintenance or Security Unit

Procedures for Determining Eligibility and Certifying/Re-certifying Incomes

Management must comply with all MHDC required program forms, reporting and training as outlined by the program manuals which can be obtained through the MHDC web site.

Management shall refer to the following documents:

- A. The State Agency's Compliance Monitoring Procedures and Reporting Forms
- B. The State Agency's Web site: www.mhdc.com
- C. HUD Handbook 4350.3
- D. IRS Section 42 code
- E. Any other program rules and regulations

4. Leasing and Occupancy Policies

Outline procedures to obtain the lease up or stabilization of the property. All marketing and leasing activities shall be done in accordance with the following:

- A. The Affirmative Fair Housing Marketing Plan.
- B. Property Resident Selection Criteria
- C. Equal Housing Opportunity
- D. Fair Housing Laws
- E. Federal, State and Local Laws
- F. Program specific requirements

5. Resident – Management Relations

Resident and Management relationship begins from the acceptance of residency. The following are a few items that should be addressed in the Management Plan to promote good communication, health, safety and/or the right to peaceful enjoyment by all residents in the community.

- A. Lease signing Orientation
 - a. Terms and conditions
 - b. Consequences of violations
- B. Work order policy
- C. Rules and Regulations policy
- D. Grievance Policy
- E. Inspection of residence Policy
- F. Noise and neglect Policy
- G. Resident Handbook

6. Enforcement of Leases

Outline the procedures taken for lease violations, terminations and evictions.

7. Accounting and Record keeping

Security Deposit Procedures

Outline the process of collecting, reconciling and disbursement of Security Deposits.

Rent Collection Procedures

Outlines rent due date and what happens if rent is not received timely.

- A. Rent collection Policies
- B. Rent violation notice Policy
 - a. Legal notification
 - b. Unlawful Holdovers
 - c. Damages
 - d. Eviction
 - e. Abandonment
- C. Rent Increase Policy and Procedure

Record keeping

Outline the procedures that management has established to ensure that all accounting, program reporting requirements and responses are being accomplished on all levels of management. Management should include any record retention period requirements mandated by program, state or local law.

- A. Accounting books and records
- B. Budget Procedure
- C. Vendor and outside contractors
- D. Rent Increase Procedure
- E. Resident Files
- F. Maintenance Inventory and Requests
- G. Utility Allowance verification
- H. Annual Owners reporting
- I. Monthly, quarterly and annual property reporting
- J. Inspection responses
- K. Employee records
- L. Any other required supporting documentation

8. Reporting Requirements

Outline the procedures that management has established to ensure that monthly, quarterly and annual reporting requirements or responses to the owner, state and other interested entities. All interested parties should be continually informed of any periodic inspections of the property and responses to any issues or findings pertaining to the inspection.

9. Social Service Requirements

Management shall outline all social services that are available or required on the property.

10. Maintenance Procedures

Outline the procedures and policy established for following items:

- A. Duties and responsibility of the Maintenance Staff
- B. Preventative Maintenance Policy
- C. Training and Certificate Requirements
- D. Training Opportunities
- E. Work Order Policy
- F. Grounds, Common areas and curb appeal Procedures
- G. Tools and Equipment maintenance
- H. Make Ready Policy
- I. Timely inspections and Repairs
- J. Housekeeping issues
- K. Resident communication skills Policy
- L. Reportable findings procedure
- M. Emergency Procedures
 - a. Snow removal Procedure
 - b. Dangerous Weather
- N. Appliance and Equipment Policy
 - a. Operation Procedure
 - b. Inventory Policy
 - 1. purchasing
 - 2. stocking
 - 3. monitoring checklist
 - c. Replacement Procedure
- O. Outside Contractor Procedure

11. Vacancy and Occupancy Procedures

Outline the procedures for preparing and maintaining vacant and pre occupied units.

12. Accessibility for disabled/handicap

Outline the procedures for leasing and occupying disabled/handicap units.

13. Management or Common Use Units

Outline the procedures for tracking, maintaining and occupying any management or common use units.

14. Office Hours

Posted office hours