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 Guidelines
- 4. Determining Eligibility Procedure Resources
- 5. Leasing and Occupancy Policies
- 6. Resident – Management Relations
- 7. Enforcement of Leases
- 8. Accounting and Record keeping
- 9. Reporting Requirements
- 10. Social Service Requirements (if applicable)
- 11. Maintenance Procedures
- 12. Vacancy and Occupancy Procedures
- 13. Accessibility for impairment
- 14. Citizenship procedures
- 15. Management or Common Use Units
- 16. Office Hours
1. **Responsibility of Management Agent**
   - A. Standard of Conduct
   - B. Goals
   - C. Property information (Total units, unit size, office)
   - D. Company Operation Procedures
   - E. Occupancy reporting
   - F. Office Hours
   - G. Licenses and Permits
   - H. Marketing
   - I. Lease up or stabilization standards
   - J. Grievance Policy
   - K. Emergency Procedures
   - L. Accounting
   - M. Rent collections
   - N. Vendor information
   - O. Insurance, Taxes and budgets
   - P. Disbursement and balances for accounts
   - Q. Employee information
   - R. Compliance Monitoring and Reporting
   - S. Physical
   - T. File
   - U. Occupancy stabilization

2. **Staffing positions and responsibilities**
   - A. Employee Policy
   - B. On-site Management
   - C. On-site Leasing
   - D. On-site Security
   - E. On-site Maintenance
   - F. On-site Grounds
   - G. Training and Certificates Required
   - H. Training Opportunities
   - I. Experience required
   - J. Duties and responsibilities
   - K. Hours – Full or Part time

3. **Resident Selection Guidelines**
   - A. Application Process
   - B. Occupancy Standards
   - C. Screening Standards
   - D. Income Requirements
   - E. Resident Eligibility Requirements
   - F. Waiting List Procedure
   - G. Manager, Maintenance or Security Unit
4. **Determining Eligibility Procedure Resources**

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 resources:

- A. The State Agency’s Compliance Monitoring Procedures and Reporting forms.
- B. The State Agency’s Web site: [www.mhdc.com](http://www.mhdc.com)
- C. HUD Handbook 4350.3
- D. IRS Section 42 Code
- E. Any other program rules and regulations available.

5. **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:

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

6. **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
- B. Terms and conditions
- C. Consequences of violations
- D. Occupancy
- E. Work order policy
- F. Rules and Regulations policy
- G. Grievance Policy
- H. Inspection of residence Policy
- I. Noise and neglect Policy
- J. Resident Handbook

7. **Enforcement of Leases**

- A. Outline the procedures taken for lease violations, terminations and evictions.
8. Accounting and Record keeping

   Security Deposit Procedures
   □ A. Outline the process of collecting, reconciling and disbursement of Security Deposits.

   Rent Collection Procedures
   Outline rent due date and what happens if rent is not received timely.
   □ A. Rent collection Policies
   □ B. Rent violation notice Policy
   □ C. Legal notification
   □ D. Unlawful Holdovers
   □ E. Damages
   □ F. Eviction
   □ G. Abandonment
   □ H. Rent Increase Policy and Procedure

   Record Keeping Procedures
   Outline all accounting, program reporting requirements and responses that are being accomplished on all levels of management. Management should include the following procedures:
   □ A. Accounting books and records
   □ B. Budget Procedures
   □ C. Vendor and outside contractors
   □ D. Rent Increase Procedure
   □ E. Resident Files organization and procedures
   □ F. Maintenance Inventory lists and Requests
   □ G. Utility Allowance verification
   □ H. Annual Owners reporting
   □ I. Timely (monthly, quarterly and annual) property reporting
   □ J. Inspection procedures and responses
   □ K. Employee records
   □ L. Required set up and updating forms
   □ M. Any other supporting documentation required

9. 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.

10. Social Service Requirements

□ Management shall outline all social services that are available or required on the property.
11. **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
- N. Snow removal Procedure
- O. Dangerous Weather
- P. Appliance and Equipment Policy
- Q. Operation Procedure
- R. Inventory Policy
  1. purchasing
  2. stocking
  3. monitoring checklist
  4. Replacement Procedure
- S. Outside Contractor Procedure

12. **Vacancy and Occupancy Procedures**
Outline the procedures for preparing and maintaining vacant and pre occupied units.

13. **Accessibility for Impairment (disabled/handicap)**
Outline the procedures for leasing and occupying impairment/disabled/handicap units.

14. **Citizenship**
Outline the procedures for requesting, tracking, and maintaining citizenship information collected.

15. **Management or Common Use Units**
Outline the procedures for requesting, tracking, maintaining and occupying any management or common use units.

15. **Office Hours**
Posted office hours
16. **Infectious Disease Management Plan**

   a. Plan for addressing an outbreak of infectious disease at the property including but not limited to communication standards for informing stakeholders.

   b. Methods of preventing or reducing infection rates including how processes normally involving person-to-person contact will be handled. Such processes include, but are not limited to interactions in the leasing office, use of community space or common amenities, resident events, deliveries, service or maintenance calls, collection of rent, interaction with third party vendors and marketing or showing of property to prospective tenants.

   c. Processes or procedures addressing high risk tenants such as elderly, special needs or vulnerable populations.

   d. Cleaning and sanitization protocols for all units and common areas.

   e. Any Infectious Disease Management Plan related services that will be provided.

   f. The duration of the Infectious Disease Management Plan.