**ATTACHMENT E**

**Outline for Contents of Management Plan**

1. Project Information

Include the name, address(es), and a brief description of the project, including the total number of units and program type(s).

1. Role and responsibility of the owner, and his/her relation to and delegation of authority to the managing agent.

This section will include the name and address of both the ownership and management entities, as well as leasing agent if different from managing agent. Include the names of all individuals of whom each entity is comprised and the designated contact person of each, a description of the structure of the management company, a list of the separate responsibilities of each, the proposed management fee, and a list of those costs to be paid from the fee and those from the project operating account. Attach a copy of the proposed management agreement between the owner and managing agent for the project. This agreement must be approved by Agency.

1. Personnel Policy and Staffing

Please include both project and managing agent’s staffing with job description, qualifications, status as full-time/part-time/percentage of hours assigned to Property if assigned to more than one property, as well as the contact person for financial issues, mortgage payouts, compliance related matters, and physical inspection issues. Include any units offered to staff, e.g., superintendent’s unit(s) and the unit size(s). Differentiate responsibilities that will be handled on-site at the property as well as any responsibilities that may be handled by the managing agent’s headquarters/centralized office.

1. Narrative Statement for Pre-marketing, Marketing, Tenant Selection, Lease-up and Re-rentals or Resales

This section is to reflect in detail all procedures indicated in the HPD-HDC Marketing Handbook’s Outline of Procedures, the Marketing Plan, and any instructional memoranda issued by the Agency that may apply. This statement should include the following:

* Pre-leasing Program and the start date (include a description of the leasing facility, if any)
* Type of advertising during initial lease-up period and during operations
* Tenant selection criteria, in accordance with the HPD-HDC Marketing Handbook, should also reflect in detail the procedures for inspection of units, transfer policy and waiting list procedures.
  1. Transfer policy should include the reasons for permitting a transfer, i.e. due to increase/decrease in family composition, reasonable accommodation, need for an accessible unit, etc. Further, the transfer policy should include procedures for selecting applicants from the Project’s waitlist and those on a Project’s transfer list, specifically the number of new move-ins v. internal transfer list.
  2. Waitlist procedures should note that the tenant selection and screening criteria will be conducted in accordance with the HPD-HDC Marketing Handbook. Explain Agent’s procedures to maintain a current waitlist or replenish a near exhausted waitlist.
* Date first unit will be ready for occupancy (if newly constructed building)
* Security deposit requirements
* Fees, if any, to be charged
* Outline of acceptable utilization of units by size
* List of all reports to be submitted to the Agency and the frequency of submission
* Acknowledgement that all applicant files, both during lease-up and thereafter, must be submitted to the Agency for review prior to lease signing

1. Rent Collection Policy

Indicate late charges or other fees and how assessed, system of billing and collection, late payment procedures, eviction prevention procedures, handling of security deposits, bookkeeping procedures, accounting, financial records, and any other relevant procedures.

1. Lease

Indicate form of lease, all riders and house rules ( as an Exhibit to this plan, provide sample of forms expected to be utilized).

1. Management ‑ Tenant Relations

Describe Agent’s orientation of tenants to policies and procedures, as well as tenant grievance policy. If applicable, describe Tenant Association /Organization (“TA”) including TA meeting space and frequency of TA/Agent meetings.

1. Social Services Program

Describe the availability of social services if applicable, and any procedure for referrals.

1. Services to Tenants

Provide a list and brief description of community rooms, recreation areas, coin operated laundries, storage units, bicycle storage, etc. Indicate which services require an additional fee from the tenant.

1. Maintenance and Repair

Items to be discussed include inventory, cycle painting of common areas and units, daily and weekly maintenance schedules, preventive maintenance, work order procedures, pest management, and emergency repairs.

1. Security

Give a brief description of all security measures within the project. Note any security cameras, placement, as well as monitoring and onsite response procedures, and security footage retention; any security guard services and hours of operation.

1. Audited Year-End Financial Statement

Indicate the project’s fiscal year-end date and confirm that the audited year-end financial statement will be submitted to the Agency within 90 days from the end of the first full fiscal year and each fiscal year thereafter.

1. Monthly Absorption Schedule

For initial lease-up only, provide a monthly unit absorption schedule that reflects the proposed lease-up timeline. t