



## MANAGEMENT AGENT APPROVAL REQUIRED DOCUMENTATION

In accordance with the Agency lending program policies and procedures the Owner must obtain and maintain a property management agreement with a duly accredited real estate property management company for the management of the Property. *In addition, the Owner shall not change the management company without written approval of the Agency.*

### 1. Proposed Management Company's Portfolio

Including:

- a. Organization Chart of Company
- b. Organization Chart of staff related to the property including Supervising and On-Site staff
- c. Compliance staffing, policies and procedure
- d. Description of duties by position
- e. Salaries and annual budget
- f. List of currently managed Affordable Multifamily Housing projects with the Project name, location, assisted units, market units and funding programs

### 2. Proposed Management Plan

Including:

- a. Affirmative Marketing Plan (SHRA-required format)
  1. Identification of demographic groups
  2. Strategy for outreach
  3. Equal Housing Logo
- b. Affordable Unit Schedule
- c. Tenant Selection Criteria and eligibility forms
- d. Tenant Application and Waiting List procedure
- e. Rent Collection, Inspection Schedule and Work Order Procedures
- f. Tenant Lease and all lease addenda
- g. House Rules and Crime Free Policy
- h. Visitation and Guest Policy
- i. VAWA and Smoke Free Policy
- j. Procedures for Appeal and Grievance

### 3. Agency Required Forms

- a. Application Screening Questionnaire (include screening company overview and contracted services)
- b. Affirmative Marketing Questionnaire
- c. Security Questionnaire

## **RESIDENT SERVICES PROVIDER REQUIRED DOCUMENTATION**

In accordance with the Agency lending program policies and procedures the Owner must obtain and maintain a resident service provider. The firm must provide services on a regular, continuous basis. *In addition, the Owner shall not change the service provider without written approval of the Agency.*

### **1. Proposed Resident Service Provider**

Including:

- a. Mission Statement
- b. Organization Chart of Company
- c. Contractual Agreement or Memorandum of Understanding
- d. Number of Staff and Qualifications
- e. Description of Duties
- f. Salaries and annual budget
- g. Program Descriptions
- h. Needs Assessment Procedure or Questionnaire
- i. Portfolio of Current Projects

### **2. Additional Requirements for Special Needs and Permanent Supportive Housing**

Including:

- a. Description of the Population and Service Needs
- b. Services to be provided
  - i. Name of Agencies
  - ii. List of Services
  - iii. Providers experiences
- c. Description of the manner in which services will be provided
  - i. How
  - ii. When
  - iii. Where
- d. Annual Budget or Funding Sources