



c. Describe the circumstances under which the Agent will require prior approval from the Owner before taking action. What action can the Agent take in emergency situations without prior approval? Will there be any limitations on the Agent's ability to carry out the Owner's responsibility?

d. Describe the Agent's ability to make disbursements for items not budgeted or for a particular item that would bring that line over budget. Identify any restrictions on the Agent's ability to disburse Development funds, or to contract for services.

**2. Project Description**

a. Type of Development

b. Description and number of units and square footage

c. Unit interior characteristics (i.e., appliances, washer/dryer hookups, flooring)





- c. Describe the training provided to new staff and the ongoing training programs available to staff.

**4. Identification of the Development Area**

a. Regional Analysis

- i. Brief description of the market area

b. Neighborhood Analysis

- i. Brief description of the neighborhood and neighborhood economic conditions

ii. Neighborhood facilities

(1) Recreation

(2) Social

(3) Medical

(4) Education

(5) Stores

(6) Transportation

c. Market Area

i. Cities and towns

ii. Expected principal market draws (i.e., industry, colleges, office complexes, etc.)

iii. Levels of income

5. **Marketing Budget**

a. Type, area and extent of advertising

b. Budgeted amount for advertising

c. Will there be a model unit?

d. Other rental concessions

**6. Market Survey** Please attach:

- a. Comparable development
- b. Location and type of development
- c. Description, size and number of units
- d. Facilities and amenities
- e. Rental schedule
- f. Indicate rent specials or concessions
- g. Occupancy level
- h. Utilities included in rent
- i. Rent concessions

**7. Absorption**

- a. Estimated completion date
  
- b. Estimated time for rent-up
  
  
- c. Monthly absorption schedule

**8. Leases**

- a. Include a copy of the development lease and either the Amendment to Model Lease for Subsidized Programs or Amendment to Lease for Market Rate Developments, whichever one applies. Include all amendments. Also provide a letter from owners'/agents' current legal counsel confirming that the apartment lease complies with all applicable statutes and regulations and is enforceable in accordance with its terms
  
- b. Provide a list of "house rules" that will be attached to the lease and any proposed extra charges (such as air conditioning). House Rules should include, but are not limited to such things as animals,(pet agreements), parking, smoking, decorating and alterations, trash disposal, guests, noise, resident-caused damage, adding locks, use of common areas and laundry rules. Also attach a copy of move-in/ move-out forms that will be used. Provide a copy of all the forms that will be issued to future residents at lease conference. All rules and regulations to be attached to the lease must be reviewed and accepted by the Asset Manager.
  
  
- c. If house rules are amended, how will the residents be notified?

Email

Posted Notice

Letter via USPS

Distributed Letter

Other - Please Explain

**9. Resident Certification**

- a. Describe the process for certifying residents at application, and recertification upon lease renewal.

**10. Lease Termination and Eviction Procedures**

All lease terminations and evictions must be handled according to applicable federal regulations or state laws. Describe eviction procedures in detail.

**11. Resident Orientation**

- a. Describe the pre-occupancy orientation program for residents, including lease signing, and building and equipment orientation.
- b. Suggested checklist for Resident Orientation:
  - Introduction to Management Staff
  - Review and understanding of the lease and the rules
  - Resident/landlord duties and responsibilities
  - Preparation for moving in
  - Maintenance and upkeep of building systems
  - Maintenance of apartments and appliances
  - Sanitation/pest control
  - Security/Safety (emergency equipment, fire drills, etc.)
  - Community resources
  - Consumer information
  - Maintenance request - routine & emergency, and
  - Energy conservation

## 12. Financial

- a. Identify the personnel responsible for the accounting systems, reports, and procedures.
  
- b. Describe in detail the accounting systems, and reports. Provide the procedures of the Management Agent for maintaining the books and records of the proposed or existing housing development, including the methods for recording rent subsidies, cash receipts, service fees and disbursements.
  
- c. Identify the personnel responsible for creating the annual budget. Provide details of the budget process.
  
- d. Identify the personnel responsible for procuring and submitting the Annual Financial Statement to the Authority.
  
- e. Identify the personnel responsible for the preparation of Interim Statement of Operations, if applicable.









**17. Maintenance and Repair**

a. Describe your policy for periodic inspections of the development, including unit interiors, common areas, equipment and mechanical, buildings and grounds.

b. What maintenance supplies and equipment will be provided to the development? What equipment and supplies will be available from another location?

c. What maintenance will be done by on-site staff, central staff, contractors, seasonal employees and/or a revolving crew and if so, what items of maintenance will they be responsible for and just how will the services and time be billed to the development?

d. Who will supervise maintenance staff and outside contractors?

e. Attach a copy of the work order to be used and explain procedures for its use.

f. How will resident maintenance requests be handled? What will be the time period for response to different types of maintenance problems? Give examples of emergencies. How will emergency maintenance be reported and handled in the absence of a resident superintendent?

g. What will the extermination program be?

h. Describe the preventive maintenance program for all mechanical equipment and structural elements. What will the schedule be for interior and exterior painting? Describe the policy for preventative maintenance.

i. How and where will trash be disposed? How will it be collected and removed from the property? Describe the recycling policy.

j. How will tenant-caused damage be identified, corrected, and charged?