



Sample Management Plan Checklist

A Management Plan must be prepared for each individual property. Management Plan must address all the following topics, though it may include more if the Owner and Manager choose.

✓	Subject	Comments	Comments
	Owner to Manager Relationship	- Liaison responsibilities - Decision making responsibilities - Tasks remaining the Owner's responsibility	
	Marketing & Outreach Plan or Affirmative Fair Housing Marketing Plan (AFHMP)	- See HUD form 935-2a - Special Outreach - Nondiscriminatory Policy	Example of Special Outreach: social media, referrals, local events, sponsorships, networking with local businesses and community, etc.
	Average Income Testing (AIT)	If the Owner elects AIT, it must be described in this document as well as the TSP	
	Tenant Selection Plan (TSP)	Visit our website for TSP checklists to use as guidance	
	Rent Collection	- Late payment process - Repayment agreements - Eviction for non-payment of rent	
	Maintenance	- Emergency maintenance - Unit turnover procedure - Unit turnover timeframes - Preventative maintenance - Work order procedure & response to calls - Routine schedules - Purchasing & inventory procedures	Emergency maintenance section should include 24-hr emergency answering service and on-call personnel.
	Budgeting and Finance	- Budgeting procedures - Spending controls - Bookkeeping practices - Auditing procedures	
	Contracts	- Contract term - Scope of services - Performance standards and timelines	Explain bidding and procurement

	Personnel	• Organizational Chart • Hiring Plan • Training • Progressive discipline • General benefits and work plan	The hiring plan should include whether new staff are being hired, or if old staff will remain. Include whether staff will be full-time or part-time and if they will be shared with other sites. Refer to Proforma for committed staffing levels.
	Management Software System	• Reporting and filing system procedures • Internal reports • Reports to the Owner • Reports to external parties • Use of Procorem for RIHousing and adherence to their security protocols	Suggested language for Procorem use: “MANAGEMENT COMPANY will adhere to all policies and procedures set forth in this plan in addition to those required by government agencies, funders, lenders, or investors.”

Intentionally left blank. For RIHousing purposes only: