# MANAGEMENT PLAN CHECKLIST

<table>
<thead>
<tr>
<th>Property Name:</th>
<th>Date:</th>
<th>Click here to enter a date.</th>
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<tbody>
<tr>
<td>PHFA No./TC No.:</td>
<td>HMR:</td>
<td>YES</td>
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1. **Describe the property.** Page #(s)  
   - Name of property  
   - Location  
   - Number of units  
   - Type of Construction

2. **Does the plan describe the relationship between the owner and the management agent?** Page #(s)  
   - Organizational Chart  
   - Delegation of Authority  
   - Key Contact Person

3. **Are staffing requirements noted? What is the proposed staffing?** Page #(s)  
   - Manager  
   - Assistant Manager  
   - Maintenance Staff  
   - Other:

4. **Are occupancy standards described?** Page #(s)  
   - Number of persons per bedroom size or per square feet  
   - Are standards reasonable (e.g. enforceable by state or local law)?

5. **Does the plan have management policies to deal with a vacant accessible unit (i.e. length of time)?**

6. **Does the plan contain all applicable VAWA requirements?** Page #(s)  
   - HUD form 91067 – VAWA Lease Addendum  
   - Form 5380 – The Notice of Occupancy Rights  
   - Form 5382 – Certification Form  
   - Does the plan specify that the information will be provided at resident move-in, at recertification, rejected applicants and with notice of eviction or termination of assistance?

7. **For HOME funded properties on or after 12/16/2016:** Page #(s)  
   - Has the property adopted a VAWA Emergency Transfer Plan?  
   - Does the plan state where the Emergency Transfer Plan is posted?

8. **For HOME funded properties:** Page #  
   - Does the plan describe if the HOME units are fixed or floating?

9. **For Homeownership option:** Page #(s)  
   - If the property converts to Homeownership after 15 years, is there an exit plan?  
   - Does the plan explain that tenant’s refusal to purchase does not constitute grounds for eviction?  
   - Does the plan explain that the owner will inform tenants of their right not to be evicted in the event of the homeownership conversion?  
   - Does the plan explain that tenants will be notified that HOME requirements will apply should they decide to purchase their unit?

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