

# MANAGEMENT WORK PLAN

(Management Services Agreement must attach a work plan that includes the following)

This MANAGEMENT WORK PLAN (“Work Plan”) is to commence on the \_\_\_\_\_ of \_\_\_\_\_, 20\_\_\_\_ and is incorporated in the Management Services Agreement between \_\_\_\_\_ Housing Authority (the “Owner”) and \_\_\_\_\_ Housing Authority (the “Management Agent.”)

## 1. Subject of Management Responsibilities:

- A. The property (the “Development”) to be managed by the Management Agent under this Work Plan is a housing development or developments consisting of the land, buildings, and other improvements described in Attachment A.
- B. The programs (the “Programs”) to be managed by the Management Agent under this Work Plan include rental voucher programs and other programs administered by the Owner other than public housing programs and are also identified in Attachment A.

## 2. Scope of Work:

In addition to the scope of work set out in the management services agreement, a written plan must be provided by the Management Agent that addresses areas of deficiency at the Owner LHA. The Work Plan may be organized in any format but shall include, without limitation, an assessment of the following items and a plan to remedy any deficiencies found.

### A. Administration & Finance

- a. Table of Organization indicating positions currently employed by the Management Agent and how they will interact with current staffing at the Owner LHA.
- b. Job Descriptions
- c. General Policies
  - i. Administration of records (Privacy & Confidentiality)
  - ii. Personnel Policy
  - iii. Collective Bargaining Agreements (if applicable)
  - iv. Sexual Harassment Policy
  - v. Workforce Analysis and Affirmative Action Plan
  - vi. Language Access Plan
  - vii. Reasonable Accommodation Policy
- d. Fiscal Policies and Procedures
  - i. Procurement
  - ii. Credit card
  - iii. Reimbursement for expenses
- e. Budget and Budget monitoring
  - i. Budget submission
  - ii. Reserves
  - iii. Other

- f. Financial Reporting
  - i. Operating Statements
  - ii. Audit reports:
    - 1. AUP
    - 2. Single Audits
    - 3. State Audits
- B. Occupancy Policy and Procedures
  - a. Tenant Selection
  - b. CORI Policy
  - c. Rent Determination and Rent Collection
  - d. Lease Policy and Procedures
    - i. Fees
    - ii. Common area use
  - e. Tenant Grievance Policy and Procedure
  - f. Legal & Evictions
  - g. Vacancy
    - i. Vacancy Reporting
    - ii. Marketing/Affirmative Action and Fair Housing
    - iii. Wait List Management
- C. Maintenance Policies and Procedures
  - a. Staffing structure and reporting policy
  - b. Preventive maintenance
  - c. Work order policy and system
  - d. Deferred maintenance
  - e. Planning & Capital Improvements
    - i. CIP Plans
    - ii. Annual Plan
- D. Security and Safety
- E. Tenant Participation (including Local Tenant Organization)
- F. Tenant Services and Amenities
- G. Compliance
  - a. Annual Inspections
  - b. REAC (Section 8 developments)
  - c. Annual, Quarterly and Monthly Reports
  - d. State Sanitary Code

## **ATTACHMENT A**

Identify all Owner Developments and Programs under the Management Agent's management.