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.