

SUGGESTED CONTENT FOR MANAGEMENT AGENT PROFILE
(Coinsured Projects)

- 1a. Name of Management Entity: _____
- 1b. E.I.N. No.: _____
- c. Type of Company
 Corporation
 Partnership
 Individual
 Other (Specify _____)

2. Names and Titles of Firm's Principals (e.g., General Partner, President, Treasurer, etc.)

Name	Title
Name	Title
Name	Title
Name	Title

3. What year did the Company begin managing:

- a. HUD-subsidized projects _____
- b. HUD-related unsubsidized projects _____
- c. Conventional projects _____

4. Estimate what percent of the Company's property management activities involve management of:

- a. Conventional projects _____ %
- b. HUD-related projects _____ %
- c. Commercial space _____ %
- d. Other _____ %

5a. How many of the following types of HUD-related projects (rental and coops) does the Company manage?

	# Projects	# Units
(1) HUD-unsubsidized	_____	_____
(2) HUD-subsidized	_____	_____
(3) HUD-owned	_____	_____

b. How many of the projects included in #5a:

- (1) have HUD-held mortgages? _____
- (2) are non-insured? _____
- (3) subsidized coops? _____
- (4) unsubsidized coops? _____

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APPENDIX 5

c. Approximately what percent of the projects in 5a above fall into the following categories:

- a. Elderly _____%
- b. Family _____%
- (2) Owned by a Non-Profit _____%
- (3) a. Core City _____%
- b. Troubled Neighborhood _____%
- c. Other Suburban _____%
- d. Rural Area _____%

6. Are any of the following activities administered out of a centralized site?

- a. Bookkeeping _____
- b. Landscaping _____
- c. Maintenance _____
- d. Purchasing _____
- e. Tenant Applications _____

7. How many of the Company's full-time employees serve in the following supervisory or advisory rolls and what percentage are minorities:

	Total No.	Percent Minority		Total No.	Percent Minority
Engineers	_____	(_____%)	Training Specialists	_____	(_____%)
Maintenance Supervisors	_____	(_____%)	Regional Property Managers	_____	(_____%)
Occupancy Supervisors	_____	(_____%)			

8. Identify any professional memberships, licenses, certificates or accreditations which are related to property management activities and are held by the Company, Company executives, or the employees considered in Item 7.

9. Describe any purchasing procedures you have implemented to control or reduce costs (e.g., bulk purchasing, paying early to take advantage of discounts, cost comparisons or bids, etc.).

10. List any companies which regularly supply goods or services to the HUD-related projects and have an identity-of-interest with the management Company or its principals (e.g., officers, general partners). Specify the type of goods or services provided.

11. What types of property management procedures or operating manuals are used by on-site or supervisory staff?

12. What types of recurring written reports are prepared on project operations (e.g., maintenance, move-ins/outs, payables, comparisons of budgeted and actual expenses)? Specify who (by position title) prepares the report, the frequency of the report, and who reviews the report.

13. How frequently do Company executives or supervisory staff visit the projects the Company manages? Specify who (by position title) conducts the on-site visits or reviews?

14. If the Company has a non-discriminatory hiring policy, please attach a copy of the policy statement.
15. If applicable, describe how the home office supervises supervisory staff (i.e., property managers, occupancy specialists, maintenance supervisors), who operate out of branch offices.
- 16a. Describe how the Company trains its employees in property management practices. Consider resident managers, grounds and maintenance employees and supervisory personnel.
- b. Describe how the Company trains its employees on HUD's financial and recordkeeping requirements and on civil rights and fair housing laws. Consider both supervisory and front-line personnel.
- NOTE: For items 16 a and b, discuss both on-going training and initial training provided when the employee is hired. Specify the frequency and duration of the training and who/what organization conducts the training.
17. Has an owner of a HUD-related project, at any time during the past three years, cancelled a property management contract held by the Company? During the past three years, how many HUD-related projects have not renewed their management contracts with the Company? Explain the reasons for any cancellations or failures to renew and identify the projects involved.
18. List all HUD Field Offices that have jurisdiction over the projects included in #5a.
19. Provide mailing addresses for the Company's home office and any branch offices involved in management of HUD-related multifamily projects. Specify the geographic area covered by each office.
20. If the firm has previously managed HUD-related multifamily housing projects, describe what non-discriminatory marketing and management policies and practices the firm has used to implement Title VIII of the Civil Rights Act of 1968.