

(Model)

Utilizing this form will ensure program compliance and aid in Departmental review but is not mandatory. You may give the same information in some other format.

## PROPOSAL FOR MANAGEMENT AGENT

For Approval of: \_\_\_\_\_ Initial Agent or \_\_\_\_\_ Change of Agent

This proposal is submitted as an application by the sponsor and management agent named below to provide management services for the project known as: \_\_\_\_\_ and located at:

2. Residential units (complete for all that apply):  
\_\_\_\_\_.

### Part 1. PROJECT INFORMATION

1. HCD Contract or Loan Number: \_\_\_\_\_  
Number: \_\_\_\_\_ Total \_\_\_\_\_ HCD \_\_\_\_\_ TCAC \_\_\_\_\_ Other Subsidy  
\_\_\_\_\_ Market Rate \_\_\_\_\_ Other Space (specify) \_\_\_\_\_

Type: \_\_\_\_\_ Multi-Family \_\_\_\_\_ Elderly \_\_\_\_\_ Special Needs \_\_\_\_\_ Other (specify)  
\_\_\_\_\_

3. Commercial space: \_\_\_\_\_ square feet

4. Other non-residential space: \_\_\_\_\_ square feet (Office space, common area, community center, day-care center, special needs area, etc.) \_\_\_\_\_  
\_\_\_\_\_.

### Part 2. PROPOSED MANAGEMENT AGENT INFORMATION

5. Name of Organization: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
Contact Person, Title: \_\_\_\_\_  
Telephone, FAX Numbers: \_\_\_\_\_  
Email: \_\_\_\_\_

6. Type of Organization:  
A. \_\_\_\_\_ Corporation \_\_\_\_\_ Partnership \_\_\_\_\_ Sole Proprietor  
B. \_\_\_\_\_ For Profit \_\_\_\_\_ Nonprofit \_\_\_\_\_ Local Government  
C. \_\_\_\_\_ Other (specify) \_\_\_\_\_ LLC

7. For how many years and what types of rental housing or commercial space has the proposed agent managed?

A. Subsidized Housing \_\_\_\_\_  
B. Private Rental Housing \_\_\_\_\_  
C. Commercial Space \_\_\_\_\_

8. By type of project, how many projects does the proposed agent currently have under management?

	<u>Total #</u>	<u># Family</u>	<u># Elderly</u>	<u>#Other</u>
Subsidized Housing	_____	_____	_____	_____
Private Rental Housing	_____	_____	_____	_____
Commercial Property	_____	_____	_____	_____

Description, as needed:

**Part 3. REQUIRED DOCUMENTATION**

**Attach the following information to this Proposal for Management Agent. The sponsor must submit copies of the Proposal and other necessary documents to the Department. A fully complete package will facilitate timely approval by the Department.**

- 9. A statement from the sponsor describing the sponsor's advertising, selection process and basis for recommendation of the proposed agent.
- 10. A copy of the proposed agent's real estate broker's license or statement of reason for exemption.
- 11. A copy of the Management Corporation's certificate of status and statement of officers (if applicable).
- 12. **A list of the rental properties currently and previously managed by the proposed agent, including the following information for each project:**
  - a. Project name and address
  - b. Number and type (e.g., multi-family, special needs, elderly) of units
  - c. Dates during which project was managed
  - d. Types of financing, (i.e., conventional, public funds, low income tax credits or other). If other public funds are part of the project financing, specify which source and type of funding (i.e., federal, state, or local; loans, grants, bonds, other contributions).
  - e. Other items as requested by the Department e.g.: names and address of owners and other governmental agencies/staff involved.

**Part 4. CERTIFICATION**

We certify that the information contained in this proposal is true and correct to the best of our knowledge and belief.

Project Sponsor:

Proposed Management Agent:

\_\_\_\_\_  
Name of Organization

\_\_\_\_\_  
Name of Organization

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Title Date

\_\_\_\_\_  
Title Date