

This form is used to assist in the collection of information which will be used to develop a management plan customized to your organization. It will help to identify certain activities and the roles of various staff members.

COMMERCIAL PROPERTY MANAGEMENT

Organizational Information

Organization: Acme CDC
Contact: _____

Address: 1234 Smith Street
San Francisco, California

Telephone: (415) 555-5555
FAX: (415) 555-5556
e-mail: _____

I) STAFFING:

Title – Name

II) GENERAL POLICIES AND PROCEDURES:

Frequency of Management Plan Review _____
Frequency of Status Reports _____
From _____ **to** _____
Property start-up:
 Project/property management coordination
 Tenant improvements
 Scheduling

III) LEASING AND OCCUPANCY

Who handles commercial leasing/marketing?

Who makes decisions about using brokers?

Who makes decisions about lease terms?

Who signs leases? _____
Are leases standardized? _____
Lease abstract? _____
Screening requirements:

Credit Report _____
Landlord Reference _____
Business Plan _____
Bank Statements _____
Other _____
Other _____

IV) MOVE-IN PROCEDURES

V) SECURITY DEPOSITS

VI) RENT COLLECTION

How is rent collected? _____

Is partial month rent accepted? _____

Who works with tenants having financial problems?

Who would approve payment work-out schedule?

Who monitors lease terms – rent increases, CAM, etc.?

Who is responsible for giving tenant notices?

Who is responsible for calculating tenant pass-throughs, escalations, etc.? _____

VII) UTILITIES

VIII) TAXES

IX) CAM

Who calculates pro-rata % allocated to tenants?

Contracts & Disbursements – different from residential procedures? _____

Budget overages and contract limits _____

Who bills for pass throughs? _____

X) BUDGETING

When are new budgets implemented? (calendar year, fiscal year)

When are proposed budgets submitted for review ?

When are budgets approved? _____

Who prepares proposed budgets? _____

Who approves budgets? _____
Is commercial budget separate from residential budget?

Reserves _____

XI) ACCOUNTING

Is there a particular bookkeeper in charge of commercial income/expenses? _____

Commercial operating statements (separate from residential) due on what day of the month? _____

What reports are required on what schedule?

List of disbursements

List of accounts payable

Cash status – balance sheet

Operating statement – monthly vs. budget
year to date vs. budget

Rent roll

Who reviews monthly operating statements? _____

XII) INSURANCE

Who keeps tenant insurance certificates? _____

Who reviews tenant insurance certificates? _____

Who monitors expiration and new tenant insurance certificates?

XIII) TENANT/LANDLORD RELATIONS

Merchant/tenant associations? _____

Site visits – who and how often? _____

Resources & referrals? _____

Grievance procedures? _____

XIV) LEASE ADMINISTRATION

Who monitors lease requirements (rent increases, CAM, options, etc.)? _____

Who gives tenant rent/lease notices? _____

Advance timing of notices _____

Who sends notices of breach of lease or other problems?

Who provides/updates rent roll and how often?

Who reviews rent rolls? _____

XV) EVICTIONS

Who gives initial written notices? _____

Who contacts tenant? _____

Eviictions referred to attorney or professional eviction service?

Policies regarding tenant workouts vs. eviction

XVI) MAINTENANCE AND SECURITY

Property Start-Up:

Warranties/ instruction manuals

Repairs under warranty

Who keeps warranties/manuals? _____

Who develops maintenance schedule & who reviews?

Who monitors warranty repairs vs. standard repairs?

System for allocation of staff maintenance between tenants/projects/commercial vs. residential - # of hours/%contract? _____

Maintenance response schedule/process: _____

Process for monitoring work to be reimbursed by tenants:

Managing tenant work (liens, workmanship, etc.) _____

Who approves tenant work and monitors permitting, etc.?

Who provides assessment of damage vs. normal wear and tear?

Who monitors tenant move-out, inspection, etc.

Is there a staff maintenance person assigned to work on commercial properties? _____

What is typically their scope of work? _____

