

**These checklists are samples. They may need to be adjusted to conform with a co-op's own by-laws, policies and procedures.**



## Marketing Checklist

NOTICE TO VACATE IS RECEIVED			
Item or Action	Start How Many Days After Notice?	Who is Responsible?	✓
Call applicants on your waiting list. If you have an approved applicant, skip the next three steps.	1-2 days	Staff / Committee / Other	
Update office phone message with details about the vacancy.	1-2 days		
Advertise the vacancy on a rental/co-op/federation website, or all three.	1-5 days		
Put out a sign, visible from the street, advertising the vacancy.	1-5 days		
Evaluate unit: if the unit can be shown, show to applicants as soon as possible.	1-5 days		
Drop off brochures at local housing-help centres, universities, senior centres or other strategic locations.	5-15 days		
Co-ordinate move-out / move-in logistics.	30-40 days		
UNIT BECOMES VACANT			
Item or Action	Start How Many Days After Vacated?	Who is Responsible?	✓
Continue to show unit to interested applicants.	1-2 days	Staff	
If necessary, hold an open house and give out applications.	1-5 days		
Confirm logistics; conduct move-in inspection; hand over key.	1-15 days		
UNIT IS RENTED AND NEW MEMBER MOVES IN			



## Unit Turnover Maintenance Checklist

NOTICE TO VACATE IS RECEIVED			
Item or Action	Start How Many Days After Notice?	Who is Responsible?	✓
Complete move-out inspection.	1-2 days	Staff	
Review move-out inspection report.	2-5 days		
Send outgoing member a list of their obligations upon move out.	2-5 days		
Schedule contractor/maintenance staff to complete minor repairs.	10 days		
Communicate with the household about the minor-repairs schedule (to be completed prior to move out).	10 days		
Complete minor repairs while unit is occupied.	10-60 days		
Schedule contractors to complete repairs / replacements required.	20-60 days		
UNIT BECOMES VACANT			
Item or Action	Start How Many Days After Vacated?	Who is Responsible?	✓
Renovations and capital repairs are underway in vacant unit.	1-10 days	Contractors/ Staff	
Final cleaning and detailing of the unit is completed.	10-15 days		
UNIT IS MOVE-IN READY			



## Wait List and Annual Planning Checklist

### Marketing

PLAN AND PREPARE			
Item or Action	Start When?	Who is Responsible?	✓
Evaluate your member-selection processes. (See member-selection checklist.)	Annual Planning	Staff / Board	
Know the features and benefits of your co-op and community.	Annual Planning	Board / Staff / Committee	
Evaluate your vacancies; develop strategic incentives when necessary.	Annual Planning	Board / Staff	
Update vacancy information on rental-housing websites.	Monthly	Staff	
Photograph sample occupancy-ready vacant or staged units.	Annual Planning	Staff / Volunteer	
Develop a brochure or flyer that showcases your co-op and community.	Annual Planning	Consultant / Committee / Staff	
Create a website and a schedule for updating the content.	Monthly	Consultant / Committee / Staff	
MANAGE THE WAIT LIST			
Item or Action	Start When?	Who is Responsible?	✓
Set the minimum and maximum number of applicants needed on your waiting list to avoid unnecessary vacancies.	Annual Planning	Staff / Committee / Other	
Advertise to keep your minimum number of applicants. (See Notice to Vacate section.)	As necessary		
Call to confirm that applicants want to stay on the list.	Once a year		



## Annual Planning Checklist

### Maintenance and Capital Replacement

Item or Action	Start When?	Who is Responsible?	✓
Have a capital plan.	Annual Planning	Staff / Board	
Develop a program for routine replacements (i.e., carpet, flooring, vanities, lighting etc.).			
Develop a general scope of work for unit turn-over (flowing from capital plan).			
Pre-qualify contractors for unit turn-over work.			