



# Fair Housing Compliance Checklist

## Advertising & Marketing

Ensuring all advertising and marketing materials comply with Fair Housing laws. This includes online, print, and other forms of communication.

**Review all advertising copy for prohibited phrases or imagery.**

Write something...


**Which advertising platforms are used? (Select all that apply)**

- ☐ Online (e.g., Zillow, Trulia, Facebook)
- ☐ Print (e.g., Newspapers, Magazines)
- ☐ Yard Signs
- ☐ Radio
- ☐ Television
- ☐ Other (specify in LONG\_TEXT)

**If 'Other' selected above, please specify advertising platforms.**

Write something...

**Upload examples of recent advertising materials (images, online ads, print ads).**

 Upload File

**Does advertising explicitly or implicitly target specific demographic groups?**

- ☐ Yes
- ☐ No
- ☐ Unsure

**If 'Yes' selected above, explain the targeting strategy and its justification. (Consult legal counsel)**

Write something...

**Are keywords used in online advertising compliant with Fair Housing guidelines?**

- ☐ Yes
- ☐ No
- ☐ Reviewed by Legal/Compliance

**If 'No' or 'Reviewed by Legal/Compliance' selected, describe keywords used and justification (if any).**

Write something...

## Client Intake & Application Process

Reviewing processes for handling inquiries, applications, and tenant screening to prevent discriminatory practices.

### Source of Inquiry?

- ☐ Online Listing
- ☐ Referral
- ☐ Walk-in
- ☐ Phone Call
- ☐ Other

### Notes Regarding Initial Inquiry (e.g., family size, financial situation)

Write something...

### Assistance Requested?

- ☐ No Assistance
- ☐ Language Assistance
- ☐ Disability Related Assistance
- ☐ Other

### Household Size (Number of People)

Enter a number...

### Date Application Received

Enter date...

### Reason for Moving?

- ☐ Job Transfer
- ☐ Price
- ☐ Size
- ☐ Location
- ☐ Other

### Notes Regarding Application Process (e.g., questions asked, assistance provided)

Write something...

## Sales & Rental Policies & Practices

Examining sales and rental practices to ensure fairness and equal opportunity for all prospective clients.

### Describe your written sales/rental policy regarding occupancy standards.

Write something...

### Explain how you handle requests for reasonable accommodations related to pets (e.g., service animals, emotional support animals).

Write something...

**Which of the following factors are *\*never\** considered in tenant selection?**

- ☐ Race
- ☐ Religion
- ☐ National Origin
- ☐ Familial Status
- ☐ Sex
- ☐ Disability
- ☐ Income

**What is the maximum number of occupants allowed per unit based on applicable regulations?**

Enter a number...

**Describe your procedure for demonstrating that any criteria used for tenant selection are directly related to a legitimate business interest.**

Write something...

**How are requests for modifications or improvements to the property handled?**

- ☐ Approved immediately
- ☐ Reviewed based on specific criteria
- ☐ Denied based on blanket policy
- ☐ Other (specify)

**Describe how your staff is instructed to respond to inquiries about the availability of units with specific accessibility features.**

Write something...

## Client Interactions & Communications

Monitoring interactions between staff and clients to identify and address any potential discriminatory behavior or unintentional bias.

**Describe your company's communication protocols for responding to inquiries from potential clients.**

Write something...

**Do you have a script or guidance for agents when discussing financing options with clients?**

☐ Yes

☐ No

**Describe how agents are instructed to handle questions about schools or neighborhood characteristics.**

Write something...

**Are agents prohibited from steering clients towards or away from specific neighborhoods?**

☐ Yes

☐ No

**Which of the following topics are agents trained to avoid discussing during client interactions? (Select all that apply)**

- ☐ Race
- ☐ Religion
- ☐ National Origin
- ☐ Familial Status
- ☐ Disability
- ☐ Sexual Orientation
- ☐ Gender Identity
- ☐ None of the Above

**Describe how agents are trained to respond to potentially discriminatory client statements or questions.**

Write something...

**Is there a documented process for escalating concerns about potential discrimination to a supervisor or manager?**

- ☐ Yes
- ☐ No

## Record Keeping & Documentation

Establishing and maintaining thorough records to demonstrate compliance with Fair Housing laws.


**Last Fair Housing Training Date**

Enter date...

## Summary of Fair Housing Training Content

Write something...

## Copy of Fair Housing Policy

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## Number of Fair Housing Complaints Received (Past Year)

Enter a number...

## Summary of Complaint Resolution Process

Write something...

## Data Points Tracked for Demographic Analysis (to ensure no disparate impact)

- ☐ Race
- ☐ Ethnicity
- ☐ Family Status
- ☐ National Origin
- ☐ Religion
- ☐ Disability
- ☐ Sex
- ☐ Source of Funds



### Description of Process for Monitoring Advertising Channels for Compliance

Write something...

### Date of Last Record Keeping Audit

Enter date...

## Training & Education

Providing ongoing training to all employees and agents on Fair Housing laws and best practices.

### Training Program Description

Write something...

### Last Training Date

Enter date...

### Number of Employees Trained

Enter a number...

### Topics Covered in Training

- ☐ Protected Classes (Race, Religion, etc.)
- ☐ Advertising Guidelines
- ☐ Client Intake & Application Process
- ☐ Reasonable Accommodation Requests
- ☐ Complaint Handling Procedures
- ☐ Accessibility (ADA) Requirements
- ☐ Language Access
- ☐ Steering
- ☐ Redlining

### Training Materials (Presentations, Handouts)

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### Next Scheduled Training Date

Enter date...

### Training Delivery Method

- ☐ In-Person
- ☐ Online (Live)
- ☐ Online (Self-Paced)
- ☐ Hybrid

### Summary of Key Fair Housing Concepts Reinforced

Write something...

# Accessibility Compliance (ADA)

Addressing requirements related to accessibility for individuals with disabilities under the Americans with Disabilities Act.

**Does the property have accessible parking spaces?**

- ☐ Yes
- ☐ No
- ☐ Not Applicable

**Number of accessible units available (if applicable)**

Enter a number...

**Are common areas accessible to individuals with disabilities (e.g., ramps, elevators)?**

- ☐ Yes
- ☐ No
- ☐ Partial/Limited Accessibility


**Describe any accessibility modifications or accommodations made to the property.**

Write something...

**Does the property comply with accessible signage requirements?**

- ☐ Yes
- ☐ No
- ☐ Under Review

**Upload photos/documentation of accessible features (e.g., ramps, accessible restrooms).**

 Upload File

**Are accessible units offered to individuals with disabilities when applying?**

- ☐ Yes
- ☐ No
- ☐ Not Applicable

## Language Access

Providing reasonable accommodations for individuals with Limited English Proficiency (LEP).

**Does your company offer translation services for key documents (applications, leases, disclosures)?**

- ☐ Yes
- ☐ No
- ☐ Limited/On-Request

**Which languages are commonly spoken in your service area that require accessibility considerations?**

- ☐ Spanish
- ☐ Chinese (Mandarin)
- ☐ Vietnamese
- ☐ Korean
- ☐ Arabic
- ☐ Tagalog
- ☐ Other (Specify in Long Text)

If 'Other' was selected in the previous question, please specify the language(s) and approximate percentage of clients who speak it.

Write something...


**Do you have a designated process for handling inquiries and communications in languages other than English?**

- ☐ Yes
- ☐ No
- ☐ Documented but not consistently followed

**Describe your process for providing language assistance (e.g., interpreters, translated documents).**

Write something...

**Upload copies of translated lease agreements or other key documents, if available.**

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## Complaint Handling & Resolution

Establishing a clear process for receiving, investigating, and resolving Fair Housing complaints.

**Describe the Complaint Handling Process**

Write something...

### Date Complaint Received

Enter date...

### Complainant Information (Name, Contact Details)

Write something...

### Summary of Complaint Received

Write something...

### Complaint Type (e.g., Discrimination, Harassment, Retaliation)

- ☐ Discrimination
- ☐ Harassment
- ☐ Retaliation
- ☐ Accessibility Issue
- ☐ Other

### Investigation Steps Taken

Write something...

### Date Investigation Completed

Enter date...

**Resolution/Outcome of Complaint**

Write something...

**Complaint Status**

- ☐ Open
- ☐ Closed - Resolved
- ☐ Closed - Unsubstantiated
- ☐ Closed - Mediation
- ☐ Closed - Legal Action

**Signature of Person Resolving Complaint**