

**MONTEREY FOUNDATION  
HOUSING APPLICANT INSTRUCTIONS**

Updated 02/2026



*Using God's Resources to Build a Lasting Legacy*

At its core, the Monterey Foundation focuses on using God's resources to serve the community. One way the Monterey Foundation seeks to use God's blessings is through providing affordable transitional family residential housing. The goal is to allow the family to work on financial independence and become self-sustaining. That includes setting several specific requirements for the occupant and an approval process prior to occupancy.

1. Application should be made to the Monterey Foundation Board of Directors or its agent by supplying the attached **Application for Housing** form and **a written narrative** submitted by the family head(s) describing in detail the following items:

- The family makeup, listing the adults by name and the children by name and age.
- The family history, describing recent events and actions that have led to your current status. List your most current address and phone numbers.
- Describe current financial situation. What debts do you owe? What income sources do you have? Are you using SNAP, welfare or Medicaid? What is your current outlook?
- Describe current or expected employment information. What resources do you currently have? Family help? Friends or church support structure? What are the expectations for the immediate future?
- Describe why you desire this housing. List your reasons for needing or wanting to occupy this residential property.
- Describe your long-term goals, and the expectations you have or the outcome you seek from your family living in Foundation housing.

2. The **narrative** and **application** may be handwritten or typed. You may email, mail, or hand deliver those to any of the contacts listed below. Nothing can be done to approve or process a particular family's application until the narrative is received and reviewed.

3. The Board or its agent will screen submitted applications, and may request additional information as part of their deliberation process.

4. When a family is identified as a potential qualifying candidate for housing, additional checks will be made. Those include doing **background checks**, credit checks, and confirmation of the information provided in the narrative. Once reviews of all background checks, credit checks, and other items (like in-person interviews, etc.) are completed, the family will be notified if they are candidates to occupy the property.

5. Prior to any agreement, the family head(s) will be interviewed and asked to prepare a **monthly budget** that will be reviewed to assess financial condition. All financial items need to be disclosed – including all sources of income, all expenses, and all known financial obligations.

6. When accepted to occupy the housing, a tailored **Occupancy Agreement** will be drafted for that family. This agreement will outline the term of the occupancy, the fee payment schedule,

and the utility schedule. A part of that Agreement is a detailed list describing the rules for the property and the Foundation's expectations of the occupant, including completion of some specific tasks with deadlines, and other requirements. The property is strictly NO PETS, NO DRUGS, NO SMOKING and NO FIREARMS.

7. The occupant and the Foundation's agent will both sign that **Occupancy Agreement** and will be provided a copy for their retention. Among other things, it will detail the occupancy period, giving an **End Date** to the agreement. Normally, that End Date will be **12 months** from occupying the home, but it can be tailored for special cases. That agreement will act in similar manner as a 'lease agreement' is used in other property arrangements and will carry the same obligations.

8. At the time of physical move-in, a property inventory will be done with the family head and the Foundation's agent. A detailed list of any furniture items provided by the Foundation and any existing property conditions will be signed and agreed to by both parties.

9. Monthly, on the **first of the month**, the agreed upon **Occupancy Fee** schedule will be implemented. Payments may be made by card, check, or money order and are due on or before the 1<sup>st</sup> day of each month. They will be payable to and delivered to the Foundation's collection agent listed in the Occupancy Agreement. In general, monthly occupancy fees are significantly lower than the market value rent. Whenever possible, we also ask the occupant family to pay for their utilities while living there.

10. As the end of the Occupancy Agreement period approaches, the family will begin the process of finding other housing. While the Foundation may assist or provide direction, this action belongs to the family. The occupant family is expected to move out prior-to or at the end of their original occupancy agreement period. Any extensions for individual circumstances will be negotiated with the Foundation at least 30 days prior to the end of the agreement period.

11. At the time of moving out, all applicable furniture checklists and inspections will be done with the Foundation's agent. Any significant property repairs found to be created or caused by the occupants will be paid for by the family as they move out.

12. The Foundation's agent will provide any necessary referrals or 'landlord' references, upon request.

**Any questions may be referred to Mike Martin (see contact information below).**

**REQUIRED FORMS:** Application Form  
Consent to Perform Background Checks  
Family Narrative  
Simple Budget Template - How much Income? / How much Expense?

#### **CONTACT INFORMATION**

Monterey Foundation  
6111 82nd Street, Lubbock, TX 79424

BStephens@MontereyChurch.com

Property Manager Contact: Mike Martin, 806-787-4700, [mikemart@swbell.net](mailto:mikemart@swbell.net)  
Backup Property Manager Contact: Butch Davis, 806-790-1682