



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 *transitional* affordable family residential housing. That comes with several requirements for the occupant - such as NO PETS, NO SMOKING, etc. - and an approval process prior to occupancy.

1. Application should be made to the Monterey Foundation Board of Directors by supplying the attached **Application for Housing** form accompanied by a **written narrative** 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 most current address and phone numbers.
- Describe current financial situation. What debts do you owe? What income sources do you have? Are you using welfare or Medicaid?
- Describe current or expected employment information. What resources do you currently have? 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 or outcome from your family living here.

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 that narrative is received and reviewed.

3. The Board will screen any applications submitted, 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 a confirmation of the information provided in the narrative. Once reviews of all background checks, credit checks, budget forecasts, and other items are completed, the family will be notified if they are accepted to occupy the property.

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

6. When accepted by the Board to occupy the housing, an **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 **expectations of the occupant**. A copy of that Agreement can be made available at any time for review.

7. The occupant and the Foundation 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.

8. At the time of physical move-in, a property inventory will be done with the family head and the Foundation representative. A detailed list of any furniture items provided 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 in cash, check, or money order, on or about the 1st day of each month. They will be payable to the Foundation, and either mailed to the address shown below or delivered to the Foundation's agent.

10. As the end of the Occupancy Agreement period approaches, the family will begin the process of finding other housing. **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 prior to the end of the agreement period.

11. At the time of moving out, all applicable 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.

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CONTACT INFORMATION

Monterey Foundation
6111 82nd Street
Lubbock, TX 79424

Board Contact: Barry Stephens, 806-795-5201
BStephens@MontereyChurch.com

Property Manager Contact: Mike Martin, 806-787-4700, mikemart@swbell.net

Backup Property Manager Contact: Butch Davis, 806-790-1682

**MONTEREY FOUNDATION
APPLICATION FOR HOUSING**

Name of Applicant _____ Telephone _____

Name of Spouse _____

Present Address _____

City, State, Zip Code _____

How many in your family? Adults ____ Children ____ (We have a strict NO PET Policy)

How long have you lived at the present address? _____

Name of Landlord _____ Telephone _____

Applicant’s Employer _____ Position _____

How long? _____ Salary _____ Telephone _____

Spouse’s Employer _____ Position _____

How long? _____ Salary _____ Telephone _____

Additional Personal/Credit References (Name - Relationship – Telephone)

I assert that the information provided in this application is true to the best of my knowledge. You are hereby authorized to verify my credit and employment references in connection with the processing of this application.

Dated: _____

Applicant Signature

Other Contact Info: email, phone, etc.