

MANAGEMENT PLAN ADDENDUM CONGREGATE PROJECTS

The purpose of this Addendum is to include in the management plan those additional duties and operating procedures inherent to congregate-type complexes. Those additional duties and responsibilities involve the development, administration, and delivery of services to the tenants of the projects that need such services, interviewing tenants to determine the services that they require to maintain an independent life-style, and establishing and maintaining the desired tenant mix in the project.

The following additions are hereby incorporated into the existing management plan.

I. Tenant Admission Policies and Leasing Policies:

A. The Management Agent will maintain two waiting lists of prospective tenants either for "Congregate" or Non-Congregate", in chronological order per unit type, age, and income level.

1. Type Defined:

- a. Congregate: Those persons who need the support services offered by the project to live independently.
- b. Non-Congregate: Those persons who are fully independent, not requiring any support services.

2. Tenant Selection

The tenant mix goal will be as follows: At initial rent-up the maximum percentage of "Congregate tenants will be _____ %.
The ongoing goal will be _____ % of "Congregate" tenants.

As existing tenants age, the percentage may increase, and USDA Rural Development will review and must approve any proposed changes.

In meeting the goals included in the plan, the management agent will utilize the two waiting lists in assigning tenants to the project.

Once the goal for one type of tenant, congregate or non-congregate, has been reached, only applicants from the other waiting list will be considered to fill the remaining units.

Management will conduct an aggressive marketing effort to assure that there are a sufficient number of applicants on each waiting list to assure that the planned tenant mix of congregate and non-congregate tenants is met. Should the marketing effort not be successful in providing an adequate number of applicants on one of the waiting lists to maintain the planned tenant mix, vacant units will then be filled from the waiting list having applicants available to move in.

II. Termination of Lease and Evictions:

A. To ensure the congregate housing project remains residential and non-institutional in nature, the Management Agent will explain clearly to applicants that:

1. When tenants can no longer remain independent without using the services, they may meet the tenant eligibility requirements in Paragraph 5.a.1.(a) of



this Plan by taking the services provided by the project.

2. As a condition of occupancy, tenants must agree to vacate the project when they can no longer remain independent even though they are assisted with services.

B. Should it be determined that the tenant is no longer capable of meeting the terms of their lease agreement and they refuse to move from their apartment unit, management will evict them in accordance with the lease agreement.

III. Service Plan:

A. Meals *

Budget Attached
 Service Agreement Attached

B. Transportation *

Budget Attached
 Service Agreement Attached

C. Housekeeping *

Budget Attached
 Service Agreement Attached

D. Personal Service *

Budget Attached
 Service Agreement Attached

E. Recreational/Social *

Budget Attached
 Service Agreement Attached



