

# OAK VIEW GARDENS ASSESSMENT CRITERIA

## **Congregate Housing**

The following are quotes from the 1930-C Instruction for Congregate Housing

### **Tenant Mix**

It is the primary intent of a congregate housing project to provide or arrange for service packages made up of various component services to serve the needs of tenants needing such services. If it is not feasible to provide service packages to all tenants, the borrower may serve tenants services and tenants not needing services. The number of tenants that can be served with service package(s) will be described in the project management plan. Project management should be consulted when establishing the tenant mix. The plan should establish a percentage of tenants who will use a service package with a greater number of component services as differentiated from tenants whose service package will contain fewer services. As existing tenant age and new tenants move in, the percentage may fluctuate. Rural Development must concur with the proposed plan.

### ***Selecting services needed or wanted by tenants in congregate housing***

1. It is the borrower's responsibility to inform applicants or tenants about the supportive services provided at or by the congregate project. Such services or service packages need to be identified on the project's application form as part of an application package.
2. It is the applicant's or tenant's responsibility to identify and request the services or service package provided by the project which that person desires or needs.
3. The borrower may have the applicant/tenant provide only such essential information about the person's desire for provided service(s) to determine whether the project provides the services desired by the applicant/tenant and/or determine how to best serve the applicant's/tenant's request for services with reasonable accommodation, referral services, etc.

The essential information may include an explanation by the applicant/tenant. In the case of a group home, it may also include an assessment by a professional medical examiner or practitioner, social service caseworker, representative of an advocacy group, member of the clergy, etc. that the tenant/applicant provides to support the application for housing and services.

### **Tenants who request services in congregate housing**

1. I understand that I have been selected to live in Oak View Gardens based on its Selection Criteria guidelines. If the selection criteria has determined the need for Meal Services and or Housekeeping

\_\_\_\_\_Initial

Services are necessary because of the residents need for assistance to maintain an independent lifestyle, based on doctor's prescription or letter of request, caseworker letter of request, or self and family evaluation, a request to drop level of services will require a doctor's evaluation or caseworker evaluation, or family evaluation stating that dropping the level of services will not cause physical or mental debilitation to tenant. If independent evaluations are not provided, the level of services must remain the same. You may provide management with proof of outside services to the tenant, which replace services needed, as determined through the initial Oak View selection criteria, and that those services are still being met, through another source. If any evaluation from doctor, caseworker or family is not in concurrence, a second evaluation may be required or the project may have to give a 30 day notice of termination of occupancy to tenant, due the inability of Tenant to maintain an independent lifestyle.

2. "I understand that use of the service package I have selected is not mandatory, and if I later choose to modify or not renew my service contract, such action on my part will not cause default under the terms of the apartment rental agreement. I further understand and agree that I may not use any aspect of dissatisfaction with my service contract as grounds to withhold rents due under the terms of the apartment lease agreement." (Subject to paragraph 1)

3. "The lessor warrants that the following basic services will be made available to all tenants for a fee separate and apart from any rent described in the terms of their lease. The basic services are Housekeeping, Meals, and Recreation. If these services cannot be provided, such failure or inability to provide the services will not constitute a breach of the apartment rental agreement, the lease agreement and the lessor will hold the tenant harmless should the tenant elect to terminate this lease on the grounds that provision of services was cause for the tenant to apply for and accept occupancy in this congregate housing project."

### **Waiting list**

To sustain the number of tenants requesting services, management may maintain waiting lists for tenants requesting large component service packages, small component services packages, and those wanting a service package at a later time. Management may choose tenants from the lists in such manner to maintain the feasibility in providing services; however, priority in tenant selection should go to an applicant requesting a service package over one requesting a service package at some later date.

The Oak View Gardens Assessment criteria will be used to determine the applicant's need for the services, as provided, by Oak View Gardens. This ranking will determine how the applicant is selected for residency as provided by the Tenant Selection Plan.

\_\_\_\_\_Initial

## MEALS SERVICE PACKAGE

Does the applicant anticipate taking this package? \_\_\_\_\_ (Please have applicant Initial)

1. To what degree does the applicant need the Meals Service Package? (This package is given the highest priority using a multiplier of six.)

- A. The applicant requires no assistance to prepare meals. \_\_\_\_\_ (0 pts.) \_\_\_\_\_ Initial
- B. The applicant requires some assistance to prepare meals. \_\_\_\_\_ (1 pt) \_\_\_\_\_ Initial
- C. The applicant requires total assistance to prepare meals. \_\_\_\_\_ (2 pts) \_\_\_\_\_ Initial
- D. The applicant cannot prepare meals, even with assistance. \_\_\_\_\_ (3 pts) \_\_\_\_\_ Initial

1. The applicant requires this degree of assistance because:

- a. They are unable to shop for food. \_\_\_\_\_
- b. They are unable to prepare meals. \_\_\_\_\_
- c. They are unable to maintain a proper diet. \_\_\_\_\_
  - 1. This assessment is based on Doctors note. \_\_\_\_\_
  - 2. This assessment is based on Caseworkers note. \_\_\_\_\_
  - 3. This assessment is based on \_\_\_\_\_

2. The applicant will require this degree of assistance on a:

- a. Temporary basis. \_\_\_\_\_ (0 pts) \_\_\_\_\_ Initial
- b. Permanent basis. \_\_\_\_\_ (3 pts) \_\_\_\_\_ Initial
  - 1. This assessment is based on Doctors note. \_\_\_\_\_
  - 2. This assessment is based on Caseworkers note. \_\_\_\_\_
  - 3. This assessment is based on \_\_\_\_\_

## HOUSEKEEPING SERVICE PACKAGE

1. Does the applicant anticipate taking this package? \_\_\_\_\_

To what degree does the applicant require the Housekeeping Service Package? (This package will be given the next highest priority using a multiplier of 2)

- a. The applicant requires no assistance in housekeeping. \_\_\_\_\_ (0pts)
- b. The applicant requires some assistance in housekeeping. \_\_\_\_\_ (1 pt)
- c. The applicant requires total assistance in housekeeping. \_\_\_\_\_ (2 pts)
- d. The applicant cannot do housekeeping, even with assistance. \_\_\_\_\_ (3 pts)

1. The applicant requires this degree of assistance because:

- a. They are unable to perform heavy chores. \_\_\_\_\_
- b. They are unable to maintain a clean and sage unit. \_\_\_\_\_
- c. They are unable to function safely when unsupervised. \_\_\_\_\_
  - 1. This assessment is based on doctor's note. \_\_\_\_\_
  - 2. This assessment is based on Caseworker's note. \_\_\_\_\_
  - 3. This assessment is based on \_\_\_\_\_

To help further determine the applicants need to live in a Congregate Care Facility; the following questions will address other areas in which the applicant has a need for additional services to sustain their independence.

**MISCELLANEOUS**

1) The applicant requires what degree of assistance to travel and/or move about the apartment and project facilities?

- a. The applicant requires no assistance with mobility. \_\_\_\_
- b. The applicant requires some assistance with mobility. \_\_\_\_
- c. The applicant requires total assistance with mobility. \_\_\_\_

2) The applicant requires what degree of assistance to maintain basic physical health?

- a. The applicant requires no assistance with health issues. \_\_\_\_
- b. The applicant requires some assistance with health issues. \_\_\_\_
- c. The applicant requires total assistance with health issues. \_\_\_\_

3) The applicant requires what degree of assistance to interact with other residents' for emotional stability and general outlook; and maintain awareness of time and place?

- a. The applicant requires no assistance with emotional/psychological issues. \_\_\_\_
- b. The applicant requires some assistance with emotional/psychological issues. \_\_\_\_
- c. The applicant requires total assistance with emotional/psychological issues. \_\_\_\_

4) The applicant requires what degree of assistance to exist safely in a relatively unsupervised environment and comply with emergency procedures; and give consideration for other resident's quiet enjoyment of the premises?

- a. The applicant requires no assistance with safety/quiet enjoyment issues. \_\_\_\_
- b. The applicant requires some assistance with safety/quiet enjoyment issues. \_\_\_\_
- c. The applicant requires total assistance with safety/quiet enjoyment issues. \_\_\_\_

5) The applicant requires what degree of assistance to communicate (oral, written, or sign) and understand?

- a. The applicant requires no assistance with communication issues. \_\_\_\_
- b. The applicant requires some assistance with communication issues. \_\_\_\_
- c. The applicant requires total assistance with communication issues. \_\_\_\_

**The prospective tenant/applicant has read and reviewed this criteria and understands that it shall become the basis for selection, and also shall become a part of service subscription agreement.**

\_\_\_\_\_  
Tenant Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Management Signature

\_\_\_\_\_  
Date

