

**STATE OF FLORIDA
FLORIDA HOUSING FINANCE CORPORATION**

CATHEDRAL TERRACE 2, LTD.

Petitioner

FHFC Case No. 2016-053VW

RFA 2014-111

v.

APPLICATION NO. 2014-426S

FLORIDA HOUSING
FINANCE CORPORATION

Respondent

_____ /

PETITION FOR WAIVER

CATHEDRAL TERRACE 2, LTD ("Petitioner"), by and through its undersigned attorney, pursuant to Section 120.542, Florida Statutes ("F.S."), and Chapters 28-104, 67-48 and 67-60 Florida Administrative Code ("F.A.C.") hereby petitions the Florida Housing Finance Corporation ("Florida Housing") for a waiver of Rule 67-48.004, F.A.C. (2014) and provisions and requirements of RFA 2014-111 SAIL Financing of Affordable Multifamily Housing Developments to be Used in Conjunction with Tax Exempt Bond Financing and Non-Competitive Housing Credits ("RFA") In support Petitioner provides as follows:

A. THE PETITIONER

1. The address, telephone and facsimile number of Petitioner is:

5300 W. Cypress St., Suite 200
Tampa, FL 33607
Tel: (727) 578-1174
Fax: (727) 579-0145

2. The address, telephone and facsimile number of Petitioner's attorney is:

Michael P. Donaldson
Carlton Fields Jordan Burt
215 S. Monroe Street, Suite 500
Tallahassee, FL 32301-1866
Tel: (850) 513-3613
Fax: (850) 222-0398

B. THE DEVELOPMENT

3. Petitioner successfully applied for financing by submitting an Application in response to the RFA. The financing was to be used to supplement the rehabilitation of a 240 unit apartment complex in Duval County, Florida named Cathedral Terrace. Petitioner was assigned Application Number 2014-426S (the "Application"). As provided in the RFA at page 18, Petitioner was required to comply with the following:

The Applicant will be required to enter into a Memorandum of Understanding (MOU) with at least one (1) designated supportive services lead agency approval by the Corporation, for the purpose of coordinating services and housing for Persons with Disabling Conditions. The Corporation will establish and maintain a list of approved participating agencies in each county that the Development shall work with to execute the MOU. The FHFC-Designated Supportive Services Lead Agencies List is available on the Corporation's Website <http://www.floridahousing.org/Developers/MultiFamilyPrograms/Competitive/2014-111/OtherInformation/> (also by clicking here). The purpose of the MOU is to establish the roles and responsibilities of the Development and lead agency/agencies in meeting the intent of this commitment. These include roles and responsibilities regarding the Applicant notifying the lead agency that a unit is available, the lead agency referring households to apply for the set-aside unit, and the lead agency addressing the needs or the residents in the set-aside unit. The roles and responsibilities of the lead agency may be in conjunction with the supportive services agency's network of community-based service providers.

C. THE RULES FROM WHICH A WAIVER IS SOUGHT

4. Petitioner requests a waiver from the portion of RFA that requires the MOU with a designated supportive services lead agency. This requirement of the RFA has been incorporated into the loan documents executed by Petitioner. As required by Rule 67-48.010(12) F.A.C. Petitioner must comply with all loan conditions and requirements.

D. STATUTES IMPLEMENTED BY THE RULE

5. The RFA implements, Chapter 420, F.S. The Florida Housing Finance Corporation Act,¹ which is the statute that created the funding programs implemented by Florida Housing. (See 420.5087 and 420.509 F.S.). As the designated funding agency, Florida Housing is responsible for and is authorized to establish procedures for the allocation and distribution of funds. Accordingly, the RFA implements, among other sections of the Act, the allocation procedures and process for funding.

6. Florida Housing has the authority pursuant to Section 120.542(1), F.S. and Chapter 28-104, F.A.C. to grant waivers to rules and other requirements when strict application of such rules and requirements would lead to unreasonable, unfair and unintended consequences in particular instances.

7. Waivers shall be granted when the person subject to the rule demonstrates that the application of the rule or in this case RFA requirements incorporated by rule would (1) create a substantial hardship or violate principals of fairness, and (2) the purpose of the underlying statute has been or will be achieved by other means by the person. Section 120.542(2), F.S.

¹ The Florida Housing Finance Corporation Act is set forth in Section 420.501 through 420.526, Florida Statutes.

E. FACTS DEMONSTRATING ENTITLEMENT TO WAIVER

8. For the reasons set forth below, compliance with the requirements of the aforementioned RFA would give rise to a substantial hardship to Petitioner that would violate principles of fairness.

9. Cathedral Terrace is a HUD Section 236 property by virtue of its original financing. However the Development has operated much closer to the model of a Section 202 property.

10. The property operates as follows:

A. The property has a Regulatory Agreement with language that mirrors a more traditional 202 set up by dedicating the property to serve elderly persons (62+) or persons with disabilities. (See Attachment 1)

B. The property employs a service coordinator whose position is funded from the operating budget, approved by HUD. A Semi-Annual Performance Report (Form 92456) is submitted to HUD to document activity of the service coordinator. The most recently completed form submitted in October 2016 indicated that nearly 44% of the current residents qualify as Frail or At-Risk Elders. In addition, there are 82 residents (35% of total residents) who fall into the category of non-elderly people with disabilities. (See Attachment 2)

C. Vernita Blocker has been the service coordinator for the property for over 21 years and has assessed the service needs of residents by determining eligibility for public services and linking residents to medical or supportive services provided by public or private agencies. Ms. Blocker has referred and linked

residents to service providers in the community such as case management, personal assistance, housekeeping, meals on wheels, transportation, visiting nurses, preventative health screen/wellness programs and legal advocacy. Ms. Blocker also monitors the ongoing provision of services and keeps the provider agency current with the progress of the resident and manages the provision of supportive services if needed. (See Attachment 3)

11. At the time of award and closing there was the requirement in the RFA for the creation of an MOU to be executed with a designated supportive services lead agency in order to among other things direct Persons with Disabling Conditions to the property.

12. Petitioner is requesting that the MOU requirement be waived given the circumstances specific to this property as follows:

- a) As explained earlier, the property is restricted to elderly or handicapped families or individuals under its HUD Regulatory Agreement, and a significant majority of the residents would qualify under Florida Housing's definition of Persons with Disabling Conditions. Because of this reality Florida Housing has waived the MOU requirements for HUD Section 202 properties in subsequent Requests for Applications and as explained above this property is operated consistent with a Section 202 property.
- b) Given that this property has HUD Section 8 rental assistance it maintains an extensive waiting list. Given the population served (low income elderly or handicapped individuals), almost everyone on the waiting list would qualify as Persons with Disabling Conditions and the majority of the residents are at or

below the Extremely Low Income limit. In addition the property employs a services coordinator.

- c) The intent of the RFA requirement at issue was to ensure that the property serves Extremely Low Income Persons with Disabling Conditions. However, by using designated supportive services lead agencies under the MOU rather than its own internal services coordinator Petitioner is disadvantaged. For example Petitioner has incurred longer vacancies times, given the lengthy time it takes the supportive services lead agency to qualify applicants. Petitioner would be better able to accomplish the RFA requirements intent in a shorter amount of time by using its own in-house wait list.

13. Petitioner believes that it makes sense to waive the MOU requirement, and that waiving this requirement is consistent with Florida Housing's past waivers addressing similar facts. (See Case No. 2015-041VW)

14. Additionally Petitioner intends to continue offering services coordination to its residents and would agree to sign an acknowledgement to that effect. To the extent Petitioner at any time in the future should cease the provision of services coordination it would immediately agree to work with a designated lead agency to provide those services.

F. WAIVER WILL SERVE THE UNDERLYING PURPOSE OF THE STATUTE

15. Florida Housing's approval of the requested waiver would serve the purpose of the underlying Act. The purpose of both the Act and the RFA is to facilitate and stimulate the development and/or preservation of multifamily rental housing that is affordable to families of limited means. If the requested waiver is granted, this site will generate better occupancy due to faster lease-up of vacant units. The property will still meet the intentions of the Handicapped or

Persons with Disabling Conditions category because the development will continue to serve frail low income seniors and mobility impaired households, the majority of which are at or below the ELI income limit.

Petitioner reserves the right to provide additional information should it be necessary.

G. TYPE OF WAIVER REQUESTED

16. The waiver being sought is permanent in nature.

H. ACTION REQUESTED

17. For the reasons stated above, Petitioner requests a waiver the RFA requirement for the creation and execution of a MOU with a designated supportive services lead agency.

Respectfully submitted this 15th day of November 2016.

/s/ Michael P. Donaldson
MICHAEL P. DONALDSON
Carlton Fields Jordan Burt
Florida Bar No. 802761
215 S. Monroe Street, Suite 500
Tallahassee, FL 32301
Telephone: 850-513-3613
Facsimile: 850-222-0398
Email: mdonaldson@carltonfields.com
Attorney for Petitioner

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that the Petition for Waiver is being served by Hand-Delivery for filing with Kate Flemming, Agency Clerk and Hugh Brown, General Counsel for the Florida Housing Finance Corporation, 227 N. Bronough Street, Suite 5000, Tallahassee, FL 32301-1329, with copies served via Hand-Delivery on the Joint Administrative Procedures Committee, 680 Pepper Building, 111 W. Madison Street, Tallahassee, Florida 32399 this 15th day of November, 2016.

/s/ Michael P. Donaldson

Michael P. Donaldson

ATTACHMENT 1

REGULATORY AGREEMENT FOR NONPROFIT MORTGAGORS
UNDER SECTION 236 OF THE NATIONAL HOUSING ACT, AS AMENDED

OFFICIAL RECORDS

Project No. 063-44007-NP-WAH-SUP

RE-RECORD

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Mortgagor W. M. MASON AND CO., a Florida corporation

Amount of Mortgage Note \$4,919,500.00

Date November 29, 1972

Mortgage Recorded:

State Florida

County Duval

Date November 29, 1972

Official Records Volume

3432

Page 363

This Agreement entered into this

29th day of November

day of November

1972

CATHEDRAL TERRACE, INC.

between [redacted], a Florida corporation

not for profit;

whose address is 256 East Church St.; Jacksonville, Florida 32202

their successors, heirs, and assigns (jointly and severally, hereinafter referred to as Owners) and the undersigned Secretary of Housing and Urban Development and his successors, acting by and through the Federal Housing Commissioner (hereinafter called Commissioner).

In consideration of the endorsement for insurance by the Commissioner of the above described note or in consideration of the consent of the Commissioner to the transfer of the mortgaged property, and in order to comply with the requirements of Section 236 of the National Housing Act, as amended, and the Regulations adopted by the Commissioner pursuant thereto, Owners agree for themselves, their successors, heirs and assigns, that in connection with the mortgaged property and the project operated thereon and so long as the contract of mortgage insurance continues in effect, and during such further period of time as the Commissioner shall be the owner, holder or reinsurer of the mortgage, or during any time the Commissioner is obligated to insure a mortgage on the mortgaged property:

1. Owners, except as limited by paragraph 18 hereof, shall promptly make all payments due under the note and mortgage; provided, however, that the Commissioner shall make payments to the mortgagee on behalf of the Owners in accordance with the interest reduction contract between the mortgagee and the Commissioner.
2. (a) Owners shall establish or continue to maintain a reserve fund for replacements by the allocation to such reserve fund in a separate account with the mortgagee or in a safe and responsible depository designated by the mortgagee, concurrently with the beginning of payments towards amortization of the principal of the mortgage insured or held by the Commissioner of an amount equal to \$ 1,630.00 per month unless a different date or amount is approved in writing by the Commissioner. Such fund, whether in the form of a cash deposit or invested in obligations of, or fully guaranteed as to principal by, the United States of America shall at all times be under the control of the mortgagee. Disbursements from such fund, whether for the purpose of effecting replacement of structural elements and mechanical equipment of the project or for any other purpose, may be made only after receiving the consent in writing of the Commissioner. In the event of a default in the terms of the Mortgage, pursuant to which the loan has been accelerated, the Commissioner may apply or authorize the application of the balance in such fund to the amount due on the mortgage debt as accelerated.
- (b) Where Owners are acquiring a project already subject to an insured mortgage, the reserve fund for replacements to be established will be equal to the amount due to be in such fund under existing agreements or charter provisions at the time Owners acquire such project, and payments hereunder shall begin with the first payment due on the mortgage after acquisition, unless some other method of establishing and maintaining the fund is approved or required in writing by the Commissioner.
- (c) Owners shall establish and maintain, in addition to the reserve fund for replacements, a residual receipts fund by depositing thereto, with the mortgagee, the residual receipts, as defined herein, within 60 days after the end of the semiannual or annual fiscal period within which such receipts are realized. Residual receipts shall be under the control of the Commissioner, and shall be disbursed only on the direction of the Commissioner, who shall have the power and authority to direct that the residual receipts, or any part thereof, be used for such purpose as he may determine.
3. Real property covered by the mortgage and this Agreement is described in Schedule A attached hereto.
4. The Owners covenant and agree that:
 - (a) with the prior approval of the Commissioner, they will establish for each dwelling unit (1) a basic rental charge determined on the basis of operating the project with payments of principal and interest under a mortgage bearing interest at one percent and (2) a fair market rental charge determined on the basis of operating the project with payments of principal, interest and mortgage insurance premiums due under the insured mortgage on the project;
 - (b) the rental charged for each unit, which will include all utilities except telephone, will be equal to 25% of the tenant's income or the basic rental, whichever is greater, but in no event shall the rental charged exceed the fair market rental; See Schedule "B" attached hereto and made a part hereof.
 - (c) on forms approved by the Commissioner they will obtain from each prospective tenant, prior to admission to the project, a certification of income, and a recertification of income from all tenants who are not paying fair market rental at intervals as required by the Commissioner;

THIS INSTRUMENT WAS PREPARED BY
WILLIAM E. SCHEU, JR. OF ULMER, MURCHISON, ASHBY & BALL
850 FLORIDA NATIONAL BANK BLDG.
JACKSONVILLE, FLORIDA

OFFICIAL RECORDS.

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- (f) if any recertification reveals a change in income whereby the tenant becomes eligible for a lower or higher rental, such adjustment in rental charged shall be made, provided that rental shall never be less than basic rental and shall never exceed fair market rental;
- (g) in a manner prescribed by the Commissioner, they will obtain written evidence substantiating the information given on the tenants' certifications and recertifications of income and shall retain the evidence in their files for three years;
- (h) they shall require all tenants who do not pay the fair market rental to execute a lease in the form prescribed by the Commissioner, and shall not rent any unit in the project for less than 30 days nor more than one year; **beginning with the commencement of the term of the interest reduction payment contract**
- (i) they shall remit to the Commissioner on or before the tenth day of each month the amount by which the total rentals collected on the dwelling units exceeds the sum of the approved basic rentals for all occupied units, which remittance shall be accompanied by a monthly report on a form approved by the Commissioner, provided that a monthly report must be filed even if no remittance is required;
- (j) they shall not restrict occupancy by reason of the fact that there are children in the family, except in those projects that are designed primarily for elderly persons;
- (k) they will rent commercial facilities, if any, at not less than the rental approved by the Commissioner;
- (l) no change will be made in the basic rental or fair market rental unless approved by the Commissioner;
- (m) no tenant shall be permitted to rent more than one unit at any given time without the prior written approval of the Commissioner;
- (n) if there are rent supplement units in the project, the determination as to the eligibility of tenants for admission to such units and the conditions of continued occupancy shall be in accordance with the Rent Supplement Contract executed by the Owners and Commissioner which is incorporated in and made a part of this Agreement.
5. Upon prior written approval of the Commissioner, the Owners may charge to and receive from any tenant such amounts as from time to time may be mutually agreed upon between the tenant and the Owners for any facilities and/or services which may be furnished by the Owners or others to such tenant upon his request, in addition to the facilities and services included in the approved Rental Schedule.
6. Owners agree that no dividends of any kind will be paid on the capital stock issued by the corporation, except as the charter may authorize due to domiciliary requirements.
7. Owners shall not without the prior written approval of the Commissioner:
- (a) Convey, transfer, or encumber any of the mortgaged property, or permit the conveyance, transfer or encumbrance of such property;
- (b) Assign, transfer, dispose of, or encumber any personal property of the project, including rents, or pay out any funds, except for reasonable operating expenses and necessary repairs;
- (c) Convey, assign, or transfer any beneficial interest in any trust holding title to the mortgaged property, or the interest of any general partner in a partnership owning the mortgaged property, or any right to manage or receive the rents and profits from the mortgaged property;
- (d) Remodel, add to, reconstruct, or demolish any part of the mortgaged property or subtract from any real or personal property of the project;
- (e) Engage in any other business or activity, including the operation of any other rental project, or incur any liability or obligation not in connection with the project;
- (f) Require, as a condition of the occupancy or leasing of any unit in the project, any consideration or deposit other than the prepayment of the first month's rent plus a security deposit in an amount not in excess of one month's rent to guarantee the performance of the covenants of the lease. Any fund collected as security deposits shall be kept separate and apart from all other funds of the project in a trust account the amount of which shall at all times equal or exceed the aggregate of all outstanding obligations under said account;
- (g) Permit the use of the dwelling accommodations of the project for any purpose except the use which was originally intended, or permit commercial use greater than that originally approved by the Commissioner;
- (h) Incur any liability, direct or contingent, other than for current operating expenses, exclusive of the indebtedness secured by the mortgage and necessarily incident to the execution and delivery thereof;
- (i) Pay any compensation, including wages or salaries; or incur any obligations, to themselves, or any officers, directors, stockholders, trustees, partners, beneficiaries, underwriters, or to any of their nominees;
- (j) Enter into any contract or contracts for supervisory or managerial services.
8. Owners shall maintain the mortgaged premises, accommodations and the grounds and equipment appurtenant thereto, in good repair and condition. In the event all or any of the buildings covered by the mortgage shall be destroyed or damaged by fire or other casualty, the money derived from any insurance on the property shall be applied in accordance with the terms of the insured mortgage.
9. Owners shall not file any petition in bankruptcy, or for a receiver, or in insolvency, or for reorganization or composition, or make any assignment for the benefit of creditors or to a trustee for creditors or permit an adjudication in bankruptcy, the taking possession of the mortgaged property or any part thereof by a receiver, or the seizure and sale of the mortgaged property or any part thereof under judicial process or pursuant to any power of sale and fail to have such adverse actions set aside within forty-five days.
10. (a) Owners shall provide for the management of the project in a manner satisfactory to the Commissioner. Any management contract entered into by Owners, or any of them, involving the project shall contain a provision that it shall be subject to termination, without penalty and with or without cause, upon written request by the Commissioner addressed to the Owners. Upon receipt of such request Owners shall immediately terminate the contract within a period of not more than thirty (30) days and shall make arrangements satisfactory to the Commissioner for continuing proper management of the project.
- (b) Payment for services, supplies, or materials shall not exceed the amount ordinarily paid for such services, supplies, or materials in the area where the services are rendered or the supplies or materials furnished.

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- (c) The mortgaged property, equipment, buildings, plans, offices, apparatus, devices, books, contracts, records, documents, and other papers relating thereto shall at all times be maintained in reasonable condition for proper audit and shall be subject to examination and inspection at any reasonable time by the Commissioner or his duly authorized agents. Owners shall keep copies of all written contracts or other instruments which affect the mortgaged property, all or any of which may be subject to inspection and examination by the Commissioner or his duly authorized agents.
 - (d) The books and accounts of the operations of the mortgaged property and of the project shall be kept in accordance with the requirements of the Commissioner.
 - (e) Within sixty days following the end of each fiscal year the Commissioner shall be furnished with a complete annual financial report based upon an examination of the books and records of the mortgagor prepared in accordance with the requirements of the Commissioner, certified to by an officer or responsible Owner and, when required by the Commissioner, prepared and certified by a Certified Public Accountant, or other person acceptable to the Commissioner.
 - (f) At the request of the Commissioner, his agents, employees, or attorneys, the Owners shall furnish monthly occupancy reports and shall give specific answers to questions upon which information is desired from time to time relative to the income, assets, liabilities, contracts, operation, and condition of the property and the status of the insured mortgage.
 - (g) All rents and other receipts of the project shall be deposited in the name of the project in a bank, whose deposits are insured by the F.D.I.C. Such funds shall be withdrawn only in accordance with the provisions of this Agreement for expenses of the project and remittances to the Commissioner as required under Paragraph 4(i) above. Any owner receiving funds of the project shall immediately deposit such funds in the project bank account and failing so to do in violation of this Agreement shall hold such funds in trust. Any owner receiving property of the project in violation of this Agreement shall immediately deliver such property to the project and failing so to do shall hold such property in trust.
11. Owners will comply with the provisions of any Federal, State, or local law prohibiting discrimination in housing on the grounds of race, color, creed, or national origin, including Title VI of the Civil Rights Act of 1964 (Public Law 88-352, 78 Stat. 241), all requirements imposed by or pursuant to the Regulations of the Department of Housing and Urban Development (24 CFR, Subtitle A, Part 1) issued pursuant to that title, and regulations issued pursuant to Executive Order 11063.
 12. Upon a violation of any of the above provisions of this Agreement by Owners, the Commissioner may give written notice, thereof, to Owners, by registered or certified mail, addressed to the addresses stated in this Agreement, or such other addresses as may subsequently, upon appropriate written notice thereof to the Commissioner, be designated by the Owners as their legal business address. If such violation is not corrected to the satisfaction of the Commissioner within thirty days after the date such notice is mailed or within such further time as the Commissioner reasonably determines is necessary to correct the violation, without further notice the Commissioner may declare a default under this Agreement effective on the date of such declaration of default and upon such default the Commissioner may:
 - (a) (1) If the Commissioner holds the note - declare the whole of said indebtedness immediately due and payable and then proceed with the foreclosure of the mortgage;
 - (2) If said note is not held by the Commissioner - notify the holder of the note of such default and request the holder to declare a default under the note and mortgage, and the holder after receiving such notice and request, but not otherwise, at its option, may declare the whole indebtedness due, and thereupon proceed with foreclosure of the mortgage, or assign the note and mortgage to the Commissioner as provided in the Regulations;
 - (b) Collect all rents and charges in connection with the operation of the project and use such collections to pay the mortgagor's obligations under this Agreement and under the note and mortgage and the necessary expenses of preserving the property and operating the project;
 - (c) Take possession of the project, bring any action necessary to enforce any rights of the Owners growing out of the project operation, and operate the project in accordance with the terms of this Agreement until such time as the Commissioner in his discretion determines that the Owners are again in a position to operate the project in accordance with the terms of this Agreement and in compliance with the requirements of the note and mortgage;
 - (d) Apply to any court, State or Federal, for specific performance of this Agreement, for an injunction against any violation of the Agreement, for the appointment of a receiver to take over and operate the project in accordance with the terms of the Agreement, or for such other relief as may be appropriate, since the injury to the Commissioner arising from a default under any of the terms of this Agreement would be irreparable and the amount of damage would be difficult to ascertain;
 - (e) Terminate the interest reduction payments to the mortgagee made pursuant to Paragraph 1 hereinaabove.
 13. As security for the payment due under this Agreement to the reserve fund for replacements, and to secure the Commissioner because of his liability under the endorsement of the note for insurance, and as security for the other obligations under this Agreement, the Owners respectively assign, pledge and mortgage to the Commissioner their rights to the rents, profits, income and charges of whatever sort which they may receive or be entitled to receive from the operation of the mortgaged property, subject, however, to any assignment of rents in the insured mortgage referred to herein. Until a default is declared under this Agreement, however, permission is granted to Owners to collect and retain under the provisions of this Agreement such rents, profits, income, and charges, but upon default this permission is terminated as to all rents due or collected thereafter.
 14. As used in this Agreement the term:
 - (a) "Mortgage" includes "Deed of Trust", "Chattel Mortgage", and any other security for the note identified herein, and endorsed for insurance or held by the Commissioner;
 - (b) "Mortgages" refers to the holder of the mortgage identified herein, its successors and assigns;
 - (c) "Mortgagor" means the original borrower under the mortgage and its successors and assigns;
 - (d) "Owners" refers to the persons named in the first paragraph hereof and designated as Owners, their successors or assigns; such term includes a nonprofit corporation executing this Agreement in its capacity as a contract purchaser of the project pursuant to a Sales Agreement with a Builder-Seller mortgagor;
 - (e) "Mortgaged Property" includes all property, real, personal, or mixed, covered by the mortgage or mortgages securing the note endorsed for insurance or held by the Commissioner;

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(f) "Project" includes the mortgaged property and all its other assets of whatsoever nature or wheresoever situate, used in or owned by the business conducted on said mortgaged property, which business is providing housing and other such activities as are incidental thereto;

(g) "Residual Receipts" means any cash remaining after:

- (1) the payment of:
 - (i) All sums due or currently required to be paid under the terms of any mortgage or note insured or held by the Federal Housing Commissioner;
 - (ii) All amounts required to be deposited in the reserve fund for replacements;
 - (iii) All obligations of the project other than the mortgage insured or held by the Commissioner unless funds for payment are set aside or deferment of payment has been approved by the Commissioner;
 - (iv) Remittances due to the Commissioner as required by Paragraph 4(i); and

- (2) the segregation of:
 - (i) An amount equal to the aggregate of all special funds required to be maintained by the project;
 - (ii) All tenant security deposits held;
 - (iii) That portion of rentals which must be remitted to the Commissioner in accordance with Paragraph 4(i), but not yet due.

(h) "Family" means (1) two or more persons related by blood, marriage, or operation of law, who occupy the same unit; (2) a handicapped person who has a physical impairment which is expected to be of long continued and indefinite duration, substantially impedes his ability to live independently, and is of such a nature that his ability to live independently could be improved by more suitable housing conditions; (3) a single person, 62 years of age or older; or (4) a single person, 62 years of age or older, who is a member of the project; ~~or (5) a single person, 62 years of age or older, who is a member of the project;~~

(i) "Income" means the gross annual income of the family from all sources before taxes and withholding, after giving effect to exclusions allowed by the Commissioner;

(j) "Default" means a default declared by the Commissioner when a violation of this Agreement is not corrected to his satisfaction within the time allowed by this Agreement or such further time as may be allowed by the Commissioner after written notice.

15. This instrument shall bind, and the benefits shall inure to, the respective Owners, their heirs, legal representatives, executors, administrators, successors in office or interest, and assigns, and to the Commissioner and his successors so long as the contract of mortgage insurance continues in effect, and during such further time as the Commissioner shall be the owner, holder, or reinsurer of the mortgage, or obligated to reinsure the mortgage.

(a) In the event this Agreement is executed by a nonprofit corporation in its capacity as a contract purchaser of the project pursuant to a Sales Agreement with a Builder-Seller mortgagor, said nonprofit corporation agrees that all of the provisions hereof shall continue to bind it in its capacity as title owner of the project upon consummation of the purchase. In the event the purchase is not consummated at final endorsement or such later time as may be agreed to in writing by the Commissioner, its obligations hereunder shall terminate.

16. Owners warrant that they have not, and will not, execute any other agreement with provisions contradictory of, or in opposition to, the provisions hereof, and that, in any event, the requirements of this Agreement are paramount and controlling as to the rights and obligations set forth and supersede any other requirements in conflict therewith.

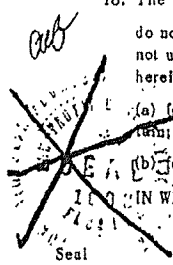
17. The invalidity of any clause, part or provision of this Agreement shall not affect the validity of the remaining portions thereof.

18. The following Owners: *None*

do not assume personal liability for payments due under the note and mortgage, to the reserve for replacements, or for matters not under their control, provided that such Owners shall remain liable under this Agreement only with respect to the matters hereinafter stated; namely:

- (a) for funds or property of the project coming into their hands which, by the provisions hereof, they are not entitled to retain; and
- (b) for their own acts and deeds or acts and deeds of others which they have authorized in violation of the provisions hereof.

IN WITNESS WHEREOF, the parties hereto have set their hands and seals on the date first hereinabove written.



CATHEDRAL TERRACE, INC.
Owners

WITNESS
William Edely
W. Stanley Gordon

By Charles W. Pruitt
Its President

Jane A. Higginbotham

SECRETARY OF HOUSING AND URBAN DEVELOPMENT
acting by and through the FEDERAL HOUSING COMMISSIONER
By [Signature]
Authorized Agent

Schedule "A" *CSB*

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OFFICIAL RECORDS.

All of Lots 1, 2, 3, & 4 and portions of Lots 5 & 6, Block 84, Harts Map of Jacksonville, more particularly described as follows:

For point of beginning, commence at the Southwesterly corner of said Lot 1, and run N. 20° 00' E., along the Easterly right of way line of Ocean Street and along the Westerly Boundaries of said Lots 1 and 4; a distance of 210.08 feet to a point in the Southerly right of way line of Union Street; run thence S. 69° 31' 00" E., along said right of way line and along the Northerly boundaries of said lots 4 and 5, a distance of 181.78 feet to a point; run thence S. 20° 03' 17" W., parallel to, and 30.00 feet Westerly from, the Easterly boundary of said Lot 5, a distance of 96.90 feet to a point; run thence S. 69° 25' 02" E. a distance of 135.84' feet to a point in the Westerly right of way line of Newnan Street and the Easterly boundary of said Lot 6; run thence S. 20° 05' 00" W., along said right of way line and along the Easterly boundaries of said Lots 6 and 3, a distance of 112.94 feet to a point in the Northerly right of way line of Beaver Street; run thence N. 69° 31' 00" W., along said right of way line and along the Southerly boundaries of said Lots 3, 2, and 1, a distance of 317.37 feet to the point of beginning.

RECORDER'S MEMO: LEGIBILITY QUESTIONABLE WHEN DOCUMENT RECEIVED.

NOTE: This Regulatory Agreement is being re-recorded in order to reflect the recording references of the Mortgage described herein.

RE-RECORD VOL 3434 PG 1133

OFFICIAL RECORDS.

VOL 3432 PG 378

OFFICIAL RECORDS.

Schedule "B" to Regulatory Agreement
between ~~CATAPPAZ - FEDERAL INC.~~ *WB*
~~_____~~, and Secretary of
Housing and Urban Development, act-
ing by and through the Federal Housing
Commissioner, dated November 29, *WB*
1972.

Paragraph 4.(c):

They shall limit admission to the project to those elderly or handicapped families whose incomes do not exceed the limits prescribed by the Commissioner, with the exception of those tenants who agree to pay fair market rental and they shall also limit assisted admission to those families whose incomes are above the lowest practicable limit which is defined as those families whose rental charge does not exceed 35% of their adjusted income, with the exception of rent supplement tenants and elderly families (62 years or older);

Paragraph 4.(d):

Preference for occupancy shall be given to elderly or handicapped families displaced from an urban renewal area, or as a result of governmental action, or as a result of a disaster determined by the President to be a major disaster, and to those elderly or handicapped families whose incomes are within the lowest practicable limits for obtaining rental units in the project;

VOL 3434 PG 1134
OFFICIAL RECORDS.
RE-RECORD

VOL 3432 PG 379

OFFICIAL RECORDS.

STATE OF FLORIDA
COUNTY OF DUVAL

I HEREBY CERTIFY that on this day before me, an officer duly authorized in the State and County aforesaid to take acknowledgments personally appeared P. M. Johnson to me known to be the person described in and who executed the foregoing instrument as the authorized agent of The Secretary of Housing and Urban Development acting by and through the Federal Housing Commissioner, and acknowledged to and before me that he executed the same as the act and deed of said Secretary for the purposes described therein.

WITNESS my hand and official seal in said County and State this 29th day of November, 1972.

Wilde B. Biederback

Notary Public in and for the County and State aforesaid.
My Commission expires:

NOTARY PUBLIC, STATE OF FLORIDA AT LARGE
MY COMMISSION EXPIRES APR 20, 1974
BONDED THRU FRED O. DIESTELHORST

STATE OF FLORIDA
COUNTY OF DUVAL

I HEREBY CERTIFY that on this day before me, an officer duly authorized in the State and County aforesaid to take acknowledgments personally appeared Charles W. Pruitt, Jr. to me known to be the person described in and who executed the foregoing instrument as President of

CATHEDRAL TERRACE, INC., a Florida corporation not for profit, the corporation named therein, and acknowledged to and before me that they executed the same as the act and deed of said corporation for the purposes described therein.

WITNESS my hand and official seal in said County and State this 29th day of November, 1972.

William E. Ellet

Notary Public in and for the County and State aforesaid.
My Commission expires: 11/8/79



72- 79154
Nov 3 4 51 PM '72

FILED AND RECORDED IN PUBLIC RECORDS OF DUVAL COUNTY, FLA
S. Maize Langley
CLERK OF COUNTY COURTS

72- 77795
Nov 29 4 51 PM '72

FILED AND RECORDED IN PUBLIC RECORDS OF DUVAL COUNTY, FLA
S. Maize Langley
CLERK OF COUNTY COURTS

Prepared by:
Hollie A. Croft, P.A.
Broad and Cassel
390 N. Orange Ave., Suite 1400
Orlando, FL 32801

Doc # 2016017462, OR BK 17438 Page 2147,
Number Pages: 6
Recorded 01/25/2016 at 04:36 PM,
Ronnie Fussell CLERK CIRCUIT COURT DUVAL
COUNTY
RECORDING \$52.50

ASSIGNMENT AND ASSUMPTION OF RENTAL USE AGREEMENT

This ASSIGNMENT AND ASSUMPTION OF RENTAL USE AGREEMENT ("Agreement") is made as of the 25th day of January, 2016, by and between CATHEDRAL TERRACE, INC., a Florida corporation ("Seller"), CATHEDRAL TERRACE 2, LTD., a Florida limited partnership (the "Purchaser"), and SECRETARY OF HOUSING AND URBAN DEVELOPMENT, its successors and assigns (the "Secretary" or "HUD"), and provides as follows:

WHEREAS, Seller was the owner of certain improved real property located in Jacksonville, Duval County, Florida, as more particularly described in Exhibit A, on which is constructed a rental apartment project known as Cathedral Terrace Apartments (collectively, "Property");

WHEREAS, Seller and HUD entered into a certain Rental Use Agreement ("Use Agreement") which has been recorded Book 17413, Page 211 in the Public Records of Duval County, Florida (the "Land Records");

WHEREAS, the Use Agreement set forth certain obligations and restrictions regarding the use of the Property and affordability of the rental units;

WHEREAS, the Seller and Purchaser entered into an Agreement for Purchase and Sale pursuant to which Seller agreed to sell, and Purchaser agreed to purchase the Property;

WHEREAS, the Seller desires, with the consent of the Secretary, to assign and Purchaser desires to assume all rights and obligations in and to the Use Agreement as herein provided, effective upon the recording among the Land Records of the deed to the Property into the Purchaser ("Effective Date").

NOW, THEREFORE, in consideration of the Assignment, the mutual agreements contained herein and other good and valuable consideration, it is agreed as follows:

1. Seller and the Secretary hereby agree to the assignment of the liabilities, duties and obligations contained in the Use Agreement from the Seller to the Purchaser and its successors and assigns subject to the terms set forth herein.

2. Seller shall be responsible for all liabilities, duties and obligations under the Use Agreement prior to the Effective Date.

3. Purchaser agrees to the assumption of all duties, obligations and restrictions set forth in the Use Agreement and shall be responsible for all liabilities or obligations arising under the Use Agreement from and after the Effective Date.

4. Except as amended herein, the Use Agreement shall be and remains in full force and effect in accordance with its terms and nothing in this Assignment shall waive, compromise, impair or prejudice any right HUD may have under the Use Agreement, including, but not limited to, seeking judicial recourse of any breach of the Use Agreement, which breach may have occurred prior to or may occur subsequent to the date of this Assignment.

5. Subject to Section 2 of this Assignment, Purchaser and the Secretary do hereby release Seller from the Use Agreement from and after the Effective Date and Purchaser does hereby agree to hold Seller harmless from and against any claims, demands or causes of action arising out of the Use Agreement based on facts or circumstances occurring after the Effective Date of this Assignment.

6. This Agreement shall run with the land and be binding upon the Purchaser, as well as any successors and assigns. Notwithstanding the above sentence, upon conveyance of the Property during the term of this Agreement, the Purchaser shall by contract, require its successors or assignees to assume its obligations under this Agreement.

7. This Agreement may be executed in counterparts all of which when taken together shall constitute an original document.

[SIGNATURE PAGES FOLLOW]

IN WITNESS WHEREOF, this Agreement has been executed as of the day and year written above.

SELLER:

WITNESSES:

CATHEDRAL TERRACE, INC., a Florida corporation

Michael G. Ware
Print: MICHAEL G. WARE

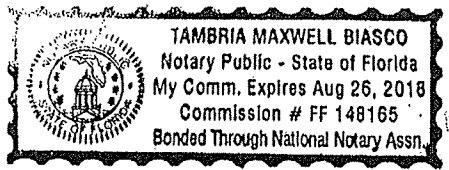
By: Teresa K. Barton
Teresa K. Barton
CEO/Executive Director

Jimmie Clements
Print: JIMMIE CLEMENTS

STATE OF FLORIDA
COUNTY OF DUVAL

The foregoing instrument was acknowledged before me this 30 day of December, 2015, by Teresa K. Barton, as CEO/Executive Director of CATHEDRAL TERRACE, INC., a Florida not for profit corporation, on behalf of the corporation. Said person is personally known to me or has produced a valid driver's license as identification.

Tambria Maxwell Biasco
Notary Public; State of Florida
Print Name: Tambria Maxwell Biasco
My Commission Expires: 8-26-2018
My Commission No.: FF 148165



IN WITNESS WHEREOF, this Agreement has been executed as of the day and year written above.

PURCHASER:

WITNESSES:

CATHEDRAL TERRACE 2, LTD., a Florida limited partnership

Michael G. Ware
Print: MICHAEL G. WARE

By: CATHEDRAL TERRACE, INC., a Florida corporation

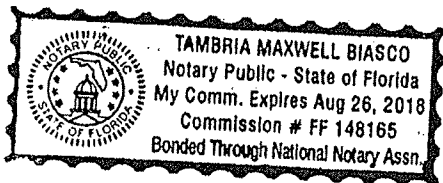
Jimmie Clements
Print: JIMMIE CLEMENTS

By: Teresa K. Barton
Teresa K. Barton
CEO/Executive Director

STATE OF FLORIDA
COUNTY OF DUVAL

The foregoing instrument was acknowledged before me this 30 day of December, 2015, by Teresa K. Barton, as CEO/Executive Director of CATHEDRAL TERRACE, INC., a Florida not for profit corporation, as the general partner of CATHEDRAL TERRACE 2, LTD., a Florida limited partnership, on behalf of the corporation and the partnership. Said person is personally known to me or has produced a valid driver's license as identification.

Tambria Maxwell Biasco
Notary Public, State of Florida
Print Name: Tambria Maxwell Biasco
My Commission Expires: 8-26-2018
My Commission No.: FF 148 165



IN WITNESS WHEREOF, this Agreement has been executed as of the day and year written above.

WITNESSES:

SECRETARY OF HOUSING AND URBAN DEVELOPMENT:

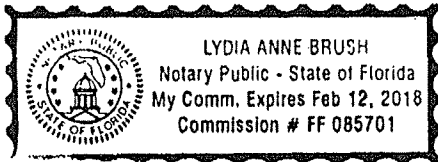
Debra Lee Varley
Print: Debra Lee Varley

By: Belinda Koros
Name: Belinda Koros
Title: Account Executive Branch Chief

Cristal H. Cervone
Print: CRISTAL H. CERVONE

STATE OF FLORIDA
COUNTY OF DUVAL

The foregoing instrument was acknowledged before me this 5 day of January, 2016, by Belinda Koros, on behalf of the Secretary of the Department of Housing and Urban Development. Said person is personally known to me or has produced a valid driver's license as identification.



Lydia Anne Brush
Notary Public; State of FLORIDA
Print Name: LYDIA ANNE BRUSH
My Commission Expires: 2/12/2018
My Commission No.: FF 085701

EXHIBIT A

Legal Description

(Cathedral Terrace)

OF LOTS 1, 2, 3 & 4 AND PORTIONS OF LOTS 5 & 6, BLOCK 84, HARTS MAP OF JACKSONVILLE, DUVAL COUNTY, FLORIDA, MORE PARTICULARLY DESCRIBED AS FOLLOWS:

FOR A POINT OF BEGINNING, COMMENCE AT THE SOUTHWESTERLY CORNER OF SAID LOT 1, AND RUN N. 20° 00' E., ALONG THE EASTERLY RIGHT OF WAY LINE OF OCEAN STREET AND ALONG THE WESTERLY BOUNDARIES OF SAID LOTS 1 AND 4, A DISTANCE OF 210.08 FEET TO A POINT IN THE SOUTHERLY RIGHT OF WAY LINE OF UNION STREET; RUN THENCE S. 69° 31' 00" E., ALONG SAID RIGHT OF WAY LINE AND ALONG THE NORTHERLY BOUNDARIES OF SAID LOTS 4 AND 5, A DISTANCE OF 181.78 FEET TO A POINT; RUN THENCE S. 20° 03' 17" W., PARALLEL TO, AND 30.00 FEET WESTERLY FROM, THE EASTERLY BOUNDARY OF SAID LOT 5, A DISTANCE OF 96.90 FEET TO A POINT; RUN THENCE S. 69° 25' 02" E. A DISTANCE OF 135.84 FEET TO A POINT IN THE WESTERLY RIGHT OF WAY LINE OF NEWNAN STREET AND THE EASTERLY BOUNDARY OF SAID LOT 6; RUN THENCE S. 20° 05' 00" W., ALONG SAID RIGHT OF WAY LINE AND ALONG THE EASTERLY BOUNDARIES OF SAID LOTS 6 AND 3, A DISTANCE OF 112.94 FEET TO A POINT IN THE NORTHERLY RIGHT OF WAY LINE OF BEAVER STREET; RUN THENCE N. 69° 31' 00" W., ALONG SAID RIGHT OF WAY LINE AND ALONG THE SOUTHERLY BOUNDARIES OF SAID LOTS 3, 2, AND 1, A DISTANCE OF 317.37 FEET TO THE POINT OF BEGINNING.

Prepared by:
Hollie A. Croft, P.A.
Broad and Cassel
390 N. Orange Ave
Suite 1400
Orlando, Florida 32801

RENTAL USE AGREEMENT

This RENTAL USE AGREEMENT ("Agreement") is made and entered into this 30th day of December, 2015, by and between CATHEDRAL TERRACE, INC., a Florida corporation ("Owner") and the SECRETARY OF HOUSING AND URBAN DEVELOPMENT ("Secretary" or "HUD"), its successors and assigns, and provides as follows:

WHEREAS, Cathedral Terrace is a 240 unit project located in Jacksonville, Florida ("Project");

WHEREAS, the Project was financed with a Secured Note and Mortgage dated November 29, 1972 and insured and assisted by the Secretary under Section 236(j)(1) of the National Housing Act, as amended, which is recorded in Book 3432, Page 363 in the Official Records of Duval County ("236 Loan");

WHEREAS, the Project additionally received two Flexible Subsidy Loans; one in the amount of \$1,824,228 and one in the amount of \$1,386,132. The total unpaid principal and accrued interest balance as of December 17, 2015 is \$3,899,494.66 ("Flex Loans");

WHEREAS, the 236 Loan matured on its terms on November 1, 2014 which triggered the repayment in full of the Flex Loans;

WHEREAS, the Owner requested a deferment of full repayment of the Flex Loans which HUD granted on December 30, 2014;

WHEREAS, in connection with the Secretary's approval of the deferment, the Owner has agreed to subject the Project to certain use restrictions, as set forth herein, which shall run with the land;

NOW, THEREFORE, in consideration of the mutual promises set forth herein, the parties hereby agree as follows:

1. Continuation of Section 8 Assistance. The Project currently receives the benefit of Section 8 assistance for 224 units pursuant to the terms of the HAP Contract (No. FL29L000028). The Owner agrees to accept and utilize project-based Section 8 assistance in accordance with the HAP Contract, and agrees to accept, on the same terms and conditions of the

existing HAP Contract, any renewal or extension of the HAP Contract or any contract under a program designated by the Secretary as a successor to the Section 8 program.

2. HAP Restrictions. Pursuant to the HAP Contract between Owner and HUD with respect to the Project which imposes certain restrictions on the Owner and the Project (the "HAP Restrictions"), the Owner is required to adhere to the most restrictive of the restrictions affecting the Property.

3. Continuation of All Affordability Restrictions. The Owner agrees to operate the Project in accordance with all low-income affordability restrictions for the project in connection with the Federal Assistance for the project for a period having a term of twenty (20) years from the date of execution of this Agreement. By "all low-income affordability restrictions" and the word "Federal" before "assistance," the statutory provision requires the continuation of any low-income affordability restrictions in effect at the project on the date of the prepayment of the section 236 mortgage, if such restrictions have resulted from Federal, as opposed to, for example, state or local assistance, whether such assistance is presently being provided, or was provided at some point in the past. Examples of affordability restrictions linked to Federal assistance can include, but not be limited to, the section 236 restrictions governing the use of IRP, use restrictions on projects that were preservation eligible and received preservation incentives pursuant to an approved plan of action, use restrictions deriving from tax credits, etc.

The following affordability restrictions shall continue for the period referred to in the preceding paragraph: The affordability restriction inherent, through the operation of the section 236 statute, and in the section 236 program, which is to provide affordable housing for low-income tenants, and, which as implemented by HUD, makes the housing affordable for tenants whose income is at 80 percent of median income or lower. Thus, all section 236 statutory and regulatory requirements governing rents and occupancy operate, including the establishment of basic and fair market rents, pursuant to 24 CFR 236 of the National Housing Act.

4. HUD Oversight. The Owner, for itself, its successors and assigns, hereby agrees and acknowledges that HUD will continue its oversight and monitoring requirements throughout the term of this Agreement.

5. Physical Condition of the Property. The Owner shall, for the term of this Agreement, maintain the property in a condition that is decent, safe and sanitary, and in good repair. It shall do so in conformity with HUD requirements at 24 CFR Part 5, Subpart G, or any successor regulation.

6. Financial Reporting Requirements. The Owner shall, for the term of this Agreement comply with HUD financial reporting requirements at 24 CFR Part 5, Subpart H, or any successor regulation.

7. Tenant-based Assistance. The Owner shall not unreasonably refuse to lease a dwelling unit to, or otherwise discriminate against, a prospective tenant because the tenant is the holder of a Certificate of Family Participation or a Voucher under Section 8 of the United States Housing Act of 1937 (42 USC § 1437f).

8. Runs With the Land. This Agreement shall run with the land described on Exhibit A attached hereto (the "Property"), and be binding upon the Owner, as well as any successors and assigns. Notwithstanding the above sentence, upon conveyance of the Project during the term of this Agreement, the Owner shall by contract, require its successors or assignees to assume its obligations under this Agreement.

9. Liens. This Agreement, with all rights, options, liens and charges created by this Agreement, is intended to be a first and prior lien and encumbrance upon title to the Property and to remain superior to any and all liens, mortgages and other encumbrances recorded against the Property.

10. Term. This Agreement shall continue in full force and effect until the date that is twenty (20) years from the execution hereof.

[SIGNATURE PAGES FOLLOW]

IN WITNESS WHEREOF, this Agreement has been executed as of the day and year written above.

OWNER:

WITNESSES:

CATHEDRAL TERRACE, INC., a Florida corporation

Michael G. Ware
Print: MICHAEL G. WARE

By: Teresa K. Barton
Teresa K. Barton
CEO/Executive Director

Jimmie Clements
Print: JIMMIE CLEMENTS

STATE OF FLORIDA

COUNTY OF DUVAL

The foregoing instrument was acknowledged before me this 23rd day of December, 2015, by Teresa K. Barton, as CEO/Executive Director of CATHEDRAL TERRACE, INC., a Florida not for profit corporation, on behalf of the corporation. Said person is personally known to me or has produced a valid driver's license as identification.

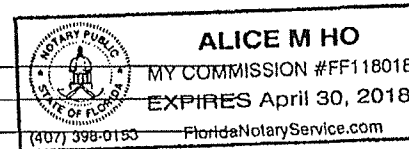
Alice M Ho

Notary Public; State of Florida

Print Name: _____

My Commission Expires: _____

My Commission No.: _____



IN WITNESS WHEREOF, this Agreement has been executed as of the day and year written above.

WITNESSES:

Debra Lee Varty
Print: Debra Lee Varty

Latonya Klade
Print: Latonya Klade

SECRETARY OF HOUSING AND URBAN DEVELOPMENT:

By: [Signature]
Name: Saadia Figueroa-Davis
Title: Chief, Resolution Specialist Branch

STATE OF Florida
COUNTY OF Duval

The foregoing instrument was acknowledged before me this 29 day of December, 2015, by Saadia Figueroa-Davis, on behalf of the Secretary of the Department of Housing and Urban Development. Said person is personally known to me or has produced a valid driver's license as identification.

[Signature]

Notary Public; State of
Print Name: _____
My Commission Expires _____
My Commission No.: _____

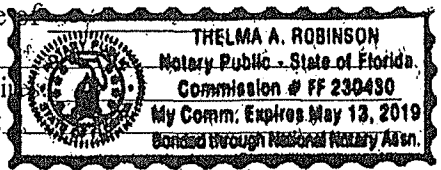


EXHIBIT A

LEGAL DESCRIPTION

(Cathedral Terrace)

OF LOTS 1, 2, 3 & 4 AND PORTIONS OF LOTS 5 & 6, BLOCK 84, HARTS MAP OF JACKSONVILLE, DUVAL COUNTY, FLORIDA, MORE PARTICULARLY DESCRIBED AS FOLLOWS:

FOR A POINT OF BEGINNING, COMMENCE AT THE SOUTHWESTERLY CORNER OF SAID LOT 1, AND RUN N. 20° 00' E., ALONG THE EASTERLY RIGHT OF WAY LINE OF OCEAN STREET AND ALONG THE WESTERLY BOUNDARIES OF SAID LOTS 1 AND 4, A DISTANCE OF 210.08 FEET TO A POINT IN THE SOUTHERLY RIGHT OF WAY LINE OF UNION STREET; RUN THENCE S. 69° 31' 00" E., ALONG SAID RIGHT OF WAY LINE AND ALONG THE NORTHERLY BOUNDARIES OF SAID LOTS 4 AND 5, A DISTANCE OF 181.78 FEET TO A POINT; RUN THENCE S. 20° 03' 17" W., PARALLEL TO, AND 30.00 FEET WESTERLY FROM, THE EASTERLY BOUNDARY OF SAID LOT 5, A DISTANCE OF 96.90 FEET TO A POINT; RUN THENCE S. 69° 25' 02" E. A DISTANCE OF 135.84 FEET TO A POINT IN THE WESTERLY RIGHT OF WAY LINE OF NEWNAN STREET AND THE EASTERLY BOUNDARY OF SAID LOT 6; RUN THENCE S. 20° 05' 00" W., ALONG SAID RIGHT OF WAY LINE AND ALONG THE EASTERLY BOUNDARIES OF SAID LOTS 6 AND 3, A DISTANCE OF 112.94 FEET TO A POINT IN THE NORTHERLY RIGHT OF WAY LINE OF BEAVER STREET; RUN THENCE N. 69° 31' 00" W., ALONG SAID RIGHT OF WAY LINE AND ALONG THE SOUTHERLY BOUNDARIES OF SAID LOTS 3, 2, AND 1, A DISTANCE OF 317.37 FEET TO THE POINT OF BEGINNING.

ATTACHMENT 2

Semi-Annual Performance Report
Multifamily Housing
Service Coordinator Program

**U.S. Department of Housing
and Urban Development**
Office of Housing
Federal Housing Commissioner

OMB Approval
No.2502-044
(exp. 30 20)

Public reporting burden for this collection of information is estimated to average 4 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information and you are not required to complete this form, unless it displays a currently valid control number.

Instructions: See pages 3 - 5 for detailed instructions.

1. Reporting Period <input type="checkbox"/> Oct. 1 - Mar 31, 2016 <input checked="" type="checkbox"/> Apr. 1 - Sept. 30, 2016	2. Service Coordinator Information Name: <input type="text" value="Blocker, Vernita"/> Email address: <input type="text" value="vblocker@carte-retmgt.com"/> Phone w/area code: <input type="text" value="(904) 798-9574"/> Number of weekly hrs at project: <input type="text" value="40.00"/> Hire date: <input type="text" value="8"/> / <input type="text" value="1"/> / 1995
---	---

3. Source of funds for Service Coordinator (check all that apply)

Debt Service Savings <input type="checkbox"/>	Residual Receipts <input type="checkbox"/>	Project Rental Assistance Project (PRAC) <input type="checkbox"/>
Grant Provider # <input type="text"/>	Section 23 Excess Income <input type="checkbox"/>	Section 8 Operating Funds <input checked="" type="checkbox"/>

4. Project Information

Project Name: Cathedral Terrace

Street Name, City, State, and Zip code: 701 N. Ocean St. Jacksonville, FL 32202

Number of Units: Number of Residents:

5. People Served

a. Resident Age Ranges
Age 18 - i.e., non elderly people w disabilities: Age 62-80: Age 81-90: Over 96: Total:

Type	Number of Project Residents	% of Total	Number SC Assisted During Reporting Period
frail Elders	17	7%	14
At Risk Elders	86	37%	71
Non- frail Elders	82	35%	58
All others	50	21%	39
Total	235	100%	182

c. Neighbors Served:
Number of low income elderly or people with disabilities who live in the neighborhood and whom you assisted during the reporting period.

d. First Timers:
Number of individuals whom you assisted for the first time during this reporting period.

New move ins: Neighborhood residents

All other project residents:

6. Type of Service Coordination Performed Click on title for **Glossary of Service Types**

For each service, provide the number of project and neighborhood residents whom you assisted and number of contacts you made. Count the individuals only once, but provide the total number of contacts for each individual.

Service/Activities	Individuals	Contacts
Advocacy	14	14
Assessments	11	11
Benefits/Entitlements	59	83
Case Management	8	32
Conflict Resolution	42	54
Crisis Intervention/ Support Counseling	30	38
Education/Employment	2	2
Fair Housing and Civil Rights Assistance	0	0
Family Support	16	32
General Info/Referral	28	29
Health Care Services	71	233
Home Management	88	264
Homemaker	3	5
Isolation Intervention	0	0

Service/Activities	Individuals	Contacts
Legal Assistance	2	2
Lease Education	22	24
Meals	5	6
Mental Health Services	17	25
Monitoring Services	34	53
Outreach	9	10
Resident Councils	0	0
Substance Abuse	0	0
Tax Preparation Services	0	0
Transfer to Alternative Housing	0	0
Translation/Interpretation	0	0
Transportation	8	21
Other (specify)	0	0

7. Aging in Place Statistics for Residents who moved out of the Project During the Reporting Period.

Move/Out Reasons	This Reporting Period	Last Reporting Period
Number of residents who died	3	2
Number of residents who moved to a higher level of care	7	4
Number of residents who moved in with family	1	1
Number of residents evicted	1	0
Other	6	3
Total number of move/outs	18	10

8. Time Allocation of Monthly Tasks (List approximate of time per month you performed these tasks. Sum of all should equal 100)

Contact with outside service providers	1	<input type="checkbox"/>	Paperwork not related to residents	0	<input type="checkbox"/>
Direct contact with project and neighborhood residents	82	<input type="checkbox"/>	Researching available services	2	<input type="checkbox"/>
Documentation of resident files	13	<input type="checkbox"/>	Meetings with property management staff	0	<input type="checkbox"/>
Other	2	<input type="checkbox"/>			
Total			100	<input type="checkbox"/>	

Please respond to the following items 9-14 on the follow pages (limited to the space provided).

9. Professional Training Duration (hours or days)

List the training programs you attended during this reporting period. Provide the name of the training provider and program, its location, number of hours, and the number of continuing education hours earned.

10. Educational / Preventative Health Programs

List the programs you implemented for project and or neighborhood residents during this reporting period.

11. Fundraising

Fundraising activities are optional, but if you have engaged in any activities during the reporting period, please list them.

12. Community Engagement

List meetings or visits with community partners and attendance at or planning of community events that encourage interaction between the community and project residents.

13. Resident Problems / Issues

Provide anecdotes (no more than two paragraphs each) describing two resident issues with which you were involved during this reporting period.

14. Additional Information

Provide any other information relevant to the administration and performance of the Service Coordinator Program. Provide any recommended "Best Practices" you have found to be effective in providing service coordination and promoting independent living for residents.

Service Coordinator's Name Blocker, Vernita Date 10/18/2016

9. Professional Training Duration (hours or days)

List the training programs you attended during this reporting period. Provide the name of the training provider and program, its location, number of hours, and the number of continuing education hours earned.

09/20/2016 Encouraging Health, Housing, Transportation and Social Service Partnerships; Provider: Lori Simon-Rusinowitz, MPH, PhD; Location: Webinar Dept. Health & Human Services, Dept. HUD; Duration: 1:30; CEUs: 0.00
09/15/2016 Medicare for Individuals Under Age 65; Provider: Georgia Burke, attorney; Location: Webinar - Justice In Aging; Duration: 1:00; CEUs: 0.00
08/25/2016 Silversphere Training; Provider: Blake & Sasha; Location: Teletron; Duration: 1:00; CEUs: 0.00
08/17/2016 The Importance of Recovery Tools for the Family; Provider: Ann Tucker; Location: Hazelden Betty Ford Foundation - Webinar; Duration: 1:00; CEUs: 0.00
08/02/2016 Improving SSA's Representative Payee Program; Provider: Shana Wynn; Location: Justice in Aging - Webinar; Duration: 1:30; CEUs: 0.00
07/28/2016 Lessons on Integrated Care from the VA and DOD; Provider: Dr. Christopher Hunter, Dr. Sarah Lucas Hartley, Dr. Edward Post; Location: Webinar - SAMHSA-HRSA; Duration: 1:30; CEUs: 0.00
07/26/2016 Assess & Educate to Prevent Re-hospitalizations; Provider: Debi Damas, RN; Location: Webinar - Relias Learning; Duration: 1:30; CEUs: 0.00
06/08/2016 HIPAA Training; Provider: Sandy Beaumont; Location: Webinar - DCF; Duration: 1:00; CEUs: 0.00
06/06/2016 Security Awareness Training; Provider: Sandy Beaumont; Location: Webinar - DCF; Duration: 1:00; CEUs: 0.00
05/27/2016 Documenting 101 Focus on Intake and Assessments; Provider: Brenda Tsavatewa, Quality Assurance Specialist; Location: Webinar, NHE; Duration: 1:00; CEUs: 0.00
05/24/2016 HCBS Final Rule Virtual Q & A Follow-up Session; Provider: Melissa Harris, Senior Policy Advisor; Location: Webinar National Council for Behavioral Health; Duration: 1:00; CEUs: 0.00
05/04/2016 Creating A Culture of Wellness: A 360 Degree View; Provider: Anthony Salerno, PhD, Rebecca Hartman, MPH; Location: Webinar, SAMHSA-HRSA; Duration: 1:30; CEUs: 0.00

10. Educational / Preventative Health Programs

List the programs you implemented for project and or neighborhood residents during this reporting period.

Semi Weekly (twice a week) - Silver Sneakers Exercise; Speaker: Fredda Renshaw; Agency: YMCA; Average Attendance: 9
Weekly - Literacy Program; Speaker: Brenda Jones; Agency: Volunteer with Cathedral Terrace; Average Attendance: 3
Weekly - Literacy Training; Speaker: Brenda Jones; Agency: n / a; Average Attendance: 1
Bi-Weekly (every 2 weeks) - LifeSkills - Communication; Speaker: Diane Mollica; Agency: Aging True; Average Attendance: 8
Bi-Weekly (every 2 weeks) - Memory Group; Speaker: Diane Mollica; Agency: Aging True; Average Attendance: 33
Semi Monthly (twice a month) - Memory Enhancement; Speaker: Dianne Mollica, MS, LMHC; Agency: Aging True; Average Attendance: 5
9/23/2016 - What you Should Know and Do this Flu Season; Speaker: Estrella Piragine, BSEd; Agency: Cathedral Care; Average Attendance: 18
9/8/2016 - Voter's Registration; Speaker: Greg Clark; Agency: Elections Office; Average Attendance: 1
8/23/2016 - Healthy Vision; Speaker: Estrella Piragine, BS, ED; Agency: Cathedral Care; Average Attendance: 17
7/29/2016 - Dehydration; Speaker: Estrella Piragine, BS, ED; Agency: Cathedral Care; Average Attendance: 19
7/13/2016 - The Importance of a Healthy Breakfast; Speaker: Sandra Perez; Agency: Duval Extension Office; Average Attendance: 14
6/24/2016 - Loud & Clear - Free Telephone for Hearing Impaired; Speaker: Candace Wyatt; Agency: Independent Living Resource Center; Average Attendance: 9
6/20/2016 - Life Skills- Secrets of Making Friends; Speaker: Diane Mollica; Agency: Aging True; Average Attendance: 6
6/17/2016 - Health Care Coverage Discussion; Speaker: Estrella Piragine, BS, ED; Agency: Cathedral Care; Average Attendance: 17
6/16/2016 - Living On A Budget, Advance Directives, Beware of Scams; Speaker: Esther McMillan; Agency: Aging True; Average Attendance: 12
6/13/2016 - Blood Glucose Check; Speaker: Christian Blaker; Agency: Diabetic Medical Concepts; Average Attendance: 6
6/10/2016 - Senior Life Services; Speaker: Wisler Myrthil; Agency: Senior Life Services; Average Attendance: 12
5/26/2016 - National High Blood Pressure Education Month; Speaker: Estrella Piragine, BS, ED; Agency: Cathedral Care;

11. Fundraising

Fundraising activities are optional, but if you have engaged in any activities during the reporting period, please list them.

12. Community Engagement

List meetings or visits with community partners and attendance at or planning of community events that encourage interaction between the community and project residents.

5/19/2016 Senior Expo;

Description: The senior expo is a great place to obtain resources and services available for seniors that enhance their quality of life. The Expo was held at the Prime Osborne Convention Center and featured a variety of vendors including social security, Vision is Priceles, Independent Living Resource Center, Assisted Living, Wellness Checks, YMCA, Hospice, Jacksonville Transportation Authority to name a few. I was able to talk to representatives and obtain material as well as business cards for future educational programs.

13. Resident Problems / Issues

Provide anecdotes (no more than two paragraphs each) describing two resident issues with which you were involved during this reporting period.

09/06/2016 A 62 year old resident showed the service coordinator a 127.00 telephone bill. As I examined the bill there were 2 separate charges for long distance and one was with an unknown company. Called AT & T and discussed the first long distance fee. The representative would not give the telephone to the supervisor but stated that person was unavailable and that I would get a call back. The coordinator refused to accept a call back and elected to wait for the supervisor. The AT & T representative eventually waived the fee and blocked long distance from the telephone. Service coordinator then called the long distance company listed and spoke to the representative that stated a call was made using the operator. Obtained the telephone number that was called as well as discovered that for 3 minutes resident was charged 39.00. When the coordinator explained that resident did not recall making a long distance call and is very hard of hearing she agreed to take a percentage off the long distance fee that was charged. Resident paid a lower amount and he was explained how using the operator result in a fee. He stated he did not use the operator but called 411. Explained to resident that this is where the charge originated. He now understands and will not use that service again. This resident is hearing impaired and unable to advocate for himself.

04/14/2016 A 61 year old resident who is hearing impaired was required to use the breathing machine for sleep apnea. The company that provide the machine stated that he was only using it 10 minutes per night. Spoke to resident who stated he uses it every night all night. Informed representative who wanted to remove the machine. By advocating for resident the representative decided to review the SD Card. After review it was determine that SD card was corrupted. It pays to advocate for one's residents. He's hearing impaired and couldn't advocate for himself. He was upset that machine would be removed as it was quite helpful to him.

14. Additional Information

Provide any other information relevant to the administration and performance of the Service Coordinator Program. Provide any recommended "Best Practices" you have found to be effective in providing service coordination and promoting independent living for residents.

Blocker, Vernita; Sandy Beaumont, government operations consultant with Department of Children and Families is our partner for all Medicaid and food stamp programs. We have a wonderful working relationship whereby she is able to help us solve application problems as well as do site visits quarterly to insure we are in compliance with the guidelines for being in partnership with Department of children and Families. I've emailed her as well as called her on many application issues and she has been helpful with answers. When she comes for her site visits she always have brochures so that I can share with residents. When I meet with other communities I encourage them to establish such a relationship as it is very helpful with the Medicaid and Food Stamp process.

Instructions for Completing Form HUD-92456 General:

Service Coordinators whose positions are paid by any of the funding sources listed in item 3 must submit this Report. Service Coordinators must fill out the form, respond to all questions on the report, provide their name and the date the report is completed at the end of the form.

Multiple Service Coordinators, Projects, and Grants

- If one project has multiple Service Coordinators, each Service Coordinator should submit his/her own report.
- If one Service Coordinator serves multiple projects, submit one report per project. You may submit one form per project, providing data for items through 8. You may attach just one text document responding to items 9 through 14.
- If one Service Coordinator position is supported by two or more grants at one project, submit one report and include all grant numbers in item 3.
- If a Service Coordinator leaves his/her job during a reporting period, he or she must, to the extent possible, complete a performance report for the time worked during that reporting period. If a new Service Coordinator starts during the same reporting period, he or she should similarly complete a report for the time worked during that reporting period. The Service Coordinator who finishes out the reporting period must send both reports to HUD, to provide data for the entire reporting period.

Method of Submission

It is preferred that you complete items through 8 on the form on your computer and create a text file that contains brief responses to items 9 through 14. Email both files together in one email to your representative in the HUD field office that services your project. If you are unable to create or email electronic files, you may complete and submit a hard paper copy to your local HUD representative.

Specific Instructions for Each Item:

- Reporting Period:** All Service Coordinators must submit this Report according to the Federal Fiscal Year dates. The reporting periods are October through March 31 and April through September 30. Your Report is due to your local field office 30 days after the end of the reporting period, i.e. April 30 and October 30, respectively. Fill in the two-digit year on March 31 or September 30.
- 2. **Service Coordinator's Information.** Enter your name, phone number, and email address. Provide the month and year you started in this position. Indicate the number of hours you work each week at the project listed in item 4.
- 3. **Source of Funds for the Service Coordinator.**
Indicate all sources of HUD funding that are used to pay for your position. Any projects do use a combination of sources.
 - If your position is supported by a HUD grant, check the "Grant" box and provide the grant number. The middle four digits of this number must begin with "C93", "C94", "CS", or "HS". An example is HS02002.
 - Do not provide your project's Section 8 number (e.g. H8902).
 - Check "Debt Service Savings", "Residual Receipts", or "Section 23 Excess Income" if your local HUD office has approved the use of these funds for the Service Coordinator program.
 - Check "Section 8 or Section 202 PRAC operating funds" if your local HUD office has approved the Service Coordinator as an on going permanent expense in your project's operating budget.
 - Check multiple boxes if you use two or more HUD sources of funds to pay for your program. For example, many programs are supported by a combination of grant funds and residual receipts or grant funds and Section 8 funds.
- 4. **Project Information.** Provide the name and address of the property where you work. Give the total number of units (i.e. apartments) in the project and the total number of residents. Remember that if you serve two or more projects you must complete a separate report for each project.
 - People Served**
 - a. **Resident Age Ranges.** Provide number of residents in each age category. The total of the four categories should match the number of residents provided in item 4.
 - b. **Residents Functional Status.** Provide the estimated number of frail, at risk, and well elderly (aged 62 and the number of non elderly people with disabilities. aged 18). The "All others" line refers to the "well" elderly.

Indicate the number of residents in each category whom you assisted in any way during the reporting period. Do not count residents twice. Regardless of the amount of time spent assisting one resident, only count that individual once. The total of the four categories in the "Number of Project Residents" column should match the number of residents provided in item 4.

A "frail" elder is someone who has difficulty performing three or more Activities of Daily Living (ADLs). An "At risk" elder is one who has difficulty performing one or two ADLs. ADL deficiencies do not apply to non elderly people with disabilities.

HUD's definition of ADLs includes eating, dressing, bathing, grooming, and transferring, as further described below:

1. Eating may need assistance with cooking, preparing, or serving food, but must be able to feed self.

2. Bathing may need assistance in getting in and out of the shower or tub, but must be able to wash self.

3. Grooming may need assistance in washing hair, but must be able to take care of personal appearance.

4. Dressing must be able to dress self, but may need occasional assistance.

5. Transferring actions such as going from a seated to standing position, getting in and out of bed, and using the toilet.

c. **Neighbors Served.** Provide the number of low-income elderly or people with disabilities who live in the neighborhood whom you assisted during the reporting period (if any). Working with neighborhood residents is optional. HUD is interested in knowing how many Service Coordinators serve the greater community and how many individuals are covered.

d. **First Timers.** Provide the number of project residents and neighbors whom you assisted for the first time during the reporting period. Make a distinction between those who moved in within the last six months ("few movers") and those who have lived in the project or neighborhood longer, but only started coming to you for assistance during this reporting period.

Type of Service Coordination Performed. For each of the listed services, provide the sum of project residents and neighbors in the "Number of Individuals" column who received that service during the reporting period. Provide the number of contacts with all individuals related to those services. Choose only the category you feel most appropriately represents the service you coordinated.

Count individuals once but report each contact with that one person. For example, you assisted three project residents in obtaining transportation services during the reporting period. To do this you had to meet with one resident three times, another resident five times and the third resident three times. So the number of individuals is three and the number of contacts is . If you additionally helped one neighborhood resident obtain transportation services and if you met with that person three times during the reporting period, then the number of individuals will be 4 and the number of contacts will be 4. Refer to the Glossary of Service Types HUD 924 G for explanations and examples of services.

Aging in Place Statistics. Provide the number of project residents who left the project during the reporting period. Residents counted in this section must have been residents of the project at the time of their departure. Do not count neighborhood residents. Provide the reason and number for each move-out. Add other reasons on the "Other" line if relevant.

HUD wants to know how the Service Coordinator program affects aging in place over time. Include the numbers from the last report as a comparison. You'll do this on each subsequent report. If you are a new Service Coordinator and don't have a previous report or access to previous data, indicate "No Data" in the relevant box.

8. Time Allocation of Monthly Tasks. List the approximate or average % of time per month you spent performing the listed tasks. Add others if appropriate. Sum of all should equal 100% of your average time each month.

Contact with outside service providers. Includes any activity related to obtaining information about or advocating for affordable supportive services or assistance for residents. Such activity may include telephone conversations, face-to-face meetings, coalition or task force meetings, or working groups.

Direct contact with project and neighborhood residents. This is the time you spend with your residents, for example in one on one meetings, informal conversation, while conducting needs screenings, or at educational program gatherings.

Documentation of resident files. Includes any notes you make, forms completed, or other information entered in resident files.

Meetings with property management staff. Includes meetings with site manager or administrator, supervisor, other property management staff, or any other related meeting.

Paperwork not related to a resident. Includes any reports written for management staff, supervisors, or peers. Also relevant is paperwork related to registering for training, arranging travel, or purchasing supplies or equipment.

Researching available services. Includes time spent searching for program information on the Internet, by phone, reading literature, and meeting with knowledgeable professionals.

Other. If you perform other work on a monthly basis, please list function and percentage of time.

Please attach a Microsoft Word or other text file that contains brief responses to items 9-14. Your report is not complete without this additional document and adequate responses to each item.

9. Professional Training Duration (hours or days)*. List the eligible training programs you attended during this reporting period. Provide the following information for each program you attended:

Name of the training program

Name of sponsoring organization that planned and executed the training i.e. training provider

Location

Duration hours or days

Number of training hours completed

Training pursuant to guidance in HUD's Management Agent Handbook 438 . RE 2 CHG 2, Chapter 8.9.

First time Service Coordinators must complete 3 hours in the first year of employment as a Service Coordinator, unless they have received recent relevant training. All other Service Coordinators must complete 2 hours of eligible training each year.

10. Educational and Preventative Health Programs. List the programs you developed and/or implemented for project and or neighborhood residents during this reporting period. Provide the name or topic of each program only and give the approximate number of individuals who attended. Indicate whether events were one time only or ongoing programs.

Examples of such programs are talks on osteoporosis, nutrition, or accessibility issues for people with disabilities, "brown bag" medication meetings with pharmacists, or remembrance groups.

11. Fundraising. List optional fundraising activities, if any, completed during this reporting period. Provide the name or brief description of each activity, the amount of funds raised, and the intended use of these funds. Please note that fundraising activities must relate to assisting the residents to age in place.

Examples of items that you might assist in fundraising include but are not limited to:

- Another part-time Service Coordinator or aide position
- Exercise equipment
- Blood pressure machine for health clinic use
- Ramp to make the project or immediate area more accessible
- Purchase or lease of a van
- Creation of computer Center and purchase of computer equipment

Examples of items that you should not directly engage in fundraising activities for include:

- Holiday parties
- Large screen TVs for community rooms
- DVD players
- Pianos and organs
- Bingo sets

12. Community Engagement. List meetings with service providers and local area partners and attendance at or planning of local events that encourage interaction between the greater community and project residents.

Community engagement is defined as follows

visits or meetings with new service providers and or local vendors, churches, schools, etc.

Attendance at community organization events that would make the greater community aware of your property and the needs of your residents.

Planning events that encourage the greater community to visit and interact with project residents.

13. Resident Problems/Issues. Provide anecdotes (no more than two paragraphs each) describing two resident issues with which you were involved during the reporting period. Indicate whether or not the issue was resolved during the reporting period. Describe positive and/or negative outcomes. The objective of this item is to give readers of the report a description of your work and the types of issues dealt with on a daily basis. Unresolved situations will be viewed as examples of difficult problems or circumstances and not as a negative reflection on your efforts. Please be candid in your account, in order to give the reader an accurate description of your work. **Do not provide any personal identifiable information.**

14. Additional Information. Provide any other information relevant to the administration and performance of the Service Coordinator Program. Provide any recommended "Best Practices" you have found to be effective in providing service coordination and promoting independent living for the residents. Examples of your "Best Practices" will be essential in helping others develop effective Service Coordinator programs and obtaining needed resources.

ATTACHMENT 3

**CATHEDRAL TERRACE
SERVICE COORDINATOR EVENTS & INFO**

Resident Activities: Monthly newsletter, Annual JSO Crime Free Housing Meeting, Holiday Activities, Monthly Floor Captains Meeting, Monthly Resident Association Meeting.

Daily Activities: Congregate meal site (Tuesday – Thursday), Crafts, Bingo, Movie Night, Coffee Time, Exercise Programs.

Voter Registration

- 5/26/16
- 8/17/16
- 12/14/16 (scheduled)

Health Care

- Bi-Monthly – Memory Enhancement, Aging True
- Every Monday and Friday – Silver Sneakers Exercise Program, YMCA
- 10/12/2015 – Blood Pressure and Glucose Checks, Aging True
- 10/16/2015 – Flu shots, Walgreens
- 2/8/16 – Dental Presentation and Free Exams, Dental Place of Jacksonville
- 2/11/16 – Blood Sugar Checks, Diabetic Concepts
- 2/18/16 – Blood Pressure Checks, Cathedral Cares
- 3/24/16 – How to Survive Allergy Season, Cathedral Cares
- 4/11/16 – Vision Screening, Vision is Priceless
- 4/15/16 – Fall Prevention, Cathedral Cares
- 4/25/16 – Sleeping Secrets, Aging True
- 5/19/16 – Losing Weight and Keeping It Off, Duval Extension Office
- 5/26/16 – Blood Pressure Checks, Cathedral Cares
- 6/13/16 – Blood Sugar Checks, Diabetic Concepts

Financial Counseling:

- 11/18/2015 – Money Management, Aging True
- 12/10/2015 – Identity Theft, Legal Aid
- 3/11/2016 – Real Sense Doing Taxes, United Way
- 3/17/2016 – Comparison Shopping, Duval Extension Office
- 6/16/2016 – Living on a Budget, Aging True
- 7/12/2016 – How to prepare your Taxes, H&R Block
- 9/19/2016 – Money Management, Aging True
- 11/17/2016 – Understanding your taxes, H&R Block
- 12/12/2016 – Identity Theft & Scams, Legal Aid

Literacy Training: Started 5/16/16 and will be every Monday.

Computer Training: There are currently two computers with printers. The computers have Microsoft Word and Excel loaded on to them and they are accessible to the residents. Due to the current

**CATHEDRAL TERRACE
SERVICE COORDINATOR EVENTS & INFO**

renovation of the building this program has not been implemented. Anticipated start date is September 2016 once the computer lab has been completed and additional computers/software installed.

Resident Assurance Program: This is completed daily, 7 days a week, through our Emergency Call System. All Residents are enrolled at move-in. Residents can sign a waiver to opt out if they choose not to participate. Residents are required to push to e-call button located in their apartments no later than 11am daily and a report is generated to the front desk for residents who did not push the e-call button. Front Desk Staff then attempts to contact the resident via phone, in person or intercom. If a resident cannot be contacted then the Service Coordinator, Desk worker, or other staff will go to the resident's apartment to determine if the resident is in need of assistance.

E-Call System: There is an emergency call system located in each unit. If a resident has an emergency they can pull the e-call cord in the unit and it will notify the front desk. The Front Desk Staff will then respond via the intercom to the resident and determine what assistance is needed. This system is monitored 24/7.

Transportation: Public Transportation is available to all residents. There is a bus top located in front of Cathedral Terrace. Cathedral also has a 26 passenger bus for planned trips.