

**Lee County Board Of County Commissioners  
Agenda Item Summary**

Blue Sheet No. 20070294

2/19/2007

**1. ACTION REQUESTED/PURPOSE:** Approve Resolution declaring improved County-owned property located at 801 Zana Drive, Fort Myers, Fl, Strap #09-44-25-P2-00500.0840, as surplus property: authorize the Board to execute the County Deed and authorize the Department of Human Services to handle and accept all documentation necessary to complete this transaction.

**2. FUNDING SOURCE:** No funds required.

**3. WHAT ACTION ACCOMPLISHES:** Declares County owned property as surplus and authorizes staff to transfer it to a non-profit corporation that promotes the community's interest and welfare.

**4. MANAGEMENT RECOMMENDATION:** Approve

**5. Departmental Category:** 05

**C5B**

**6. Meeting Date:** 3/13/07

**7. Agenda:**

- Consent
- Administrative
- Appeals
- Public
- Walk-On

**8. Requirement/Purpose: (specify)**

- FS Statute 175-38
- Ordinance
- Admin. Code
- Other

**9. Request Initiated:**

Commissioner \_\_\_\_\_  
 Department Human Services  
 Division Housing Services  
 By: Marsha Popkey

**10. Background:** The Department of Human Services acquired subject property and rehabilitated it with Federal funds to be utilized for supportive housing for persons with disabilities. Through a Request for Proposals, the Department of Human Services selected Gulf Coast Jewish Family Services, Inc., a non-profit Florida Corporation to own and manage the property and to coordinate supported services to assist persons with special needs in retaining their housing. This property will provide four supportive housing units for qualifying individuals. Gulf Coast Jewish Family Services will be responsible for costs related to the recording fees and documentary tax stamps.

**Attachments:** Resolution of Surplus Real Property to a Not-For-Profit; County Deed with Declaration of Restrictive Covenants; Transfer of Property Agreement; Response to Request for Proposal; Location Map.

**11. Review for Scheduling:**

Department Director	Purchasing or Contracts	Human Resources	Other County Lands	County Attorney	Budget Services				County Manager/P. W. Director
					Analyst	Risk	Grants	Mgr.	
<i>[Signature]</i>	N/A	N/A		<i>Uchida</i>	RK 2/23	<i>MP</i> 2/22/07	RK for RB 2/26	<i>MP</i> 2/26/07	2-27-07

**12. Commission Action:**

- Approved
- Deferred
- Denied
- Other

RECEIVED BY COUNTY ADMIN: RLC  
23 11:05 AM  
 COUNTY ADMIN FORWARDED TO:

Rec. by CoAtty  
 Date: 2/22/07  
 Time: 4:10pm  
 Forwarded To:

27 3:00 PM  
 to PR

CAD 2/23/07

**RESOLUTION OF SURPLUS REAL PROPERTY TO A NOT-FOR-PROFIT**

**A RESOLUTION OF LEE COUNTY RELATING TO THE DONATION  
OF CERTAIN LEE COUNTY SURPLUS LANDS TO  
GULF COAST JEWISH FAMILY SERVICES, INC. A NON-PROFIT FLORIDA  
CORPORATION  
FOR CERTAIN AUTHORIZATIONS; PROVIDING FOR AN EFFECTIVE DATE.**

**RECITATIONS**

**WHEREAS**, The Board of County Commissioners is the governing body in and for Lee County, a political subdivision and Charter County of the State of Florida; and

**WHEREAS**, The Board of County Commissioners has certain powers and authority relative to the disposition of real property belonging to the County; and,

**WHEREAS**, pursuant to Section 125.38, Florida Statutes, the County has the authority to convey real property by private sale to any corporation or organization not-for-profit for nominal consideration if certain findings are made by the Board of County Commissioners; and,

**WHEREAS**, Gulf Coast Jewish Family Services, Inc. is a corporation or other organization not-for-profit, which is organized for the purposes of promoting community interest and welfare as contemplated by Section 125.38, Florida Statutes, and as created by Chapter 373, Florida Statutes; and,

**WHEREAS**, Gulf Coast Jewish Family Services, Inc. has formally made application to The Board of County Commissioners for the donation of certain Lee County real property (Exhibit 1 - Legal Description) for use as said organization not-for-profit deems appropriate; and,

**WHEREAS**, The Board has carefully reviewed the subject parcel and finds that the real property is not needed for any County purpose, and further finds that the use by Renaissance Manor, Inc. serves a public purpose and is in the public interest; and,

**WHEREAS**, The Board of County Commissioners also finds that it serves a public purpose to convey the subject property to Gulf Coast Jewish Family Services, Inc. for the nominal consideration of One Dollar (\$1.00).

**NOW THEREFORE, BE IT RESOLVED BY  
THE BOARD OF COUNTY COMMISSIONERS THAT:**

1. The above recitations are true and accurate and are hereby adopted and incorporated herein as if set out at length, and said real property is hereby declared surplus land.
2. Lee County recognizes and accepts the Gulf Coast Jewish Family Services, Inc. application to receive said Lee County surplus real property in fee simple (Exhibit 2 - Application).
3. Lee County recognizes and accepts the Gulf Coast Jewish Family Services, Inc. proposal to use the County surplus property for its stated purposes.
4. In order that the proposed transaction is more efficiently consummated, the Board specifically authorizes and directs relevant County staff to develop and finalize all necessary documents for the contemplated transaction, and specifically authorizes the Chair of the Board of County Commissioners to execute any and all such necessary documents for the said transaction on behalf of the Board of County Commissioners.
5. This Resolution shall become effective immediately upon its adoption.

**ATTEST:  
CHARLIE GREEN  
CLERK OF COURTS**

**BOARD OF COUNTY COMMISSIONERS  
OF LEE COUNTY, FLORIDA**

By: \_\_\_\_\_  
Deputy Clerk

By: \_\_\_\_\_  
Chair

**APPROVED AS TO FORM:**

By: \_\_\_\_\_  
Lee County Attorney's Office

**Exhibit A**

This Instrument Prepared by:  
LEE COUNTY DIVISION OF HUMAN SERVICES  
Post Office Box 398  
Fort Myers, Florida 33902-0398  
STRAP No. 09-44-25-P2-00500.0840

**COUNTY DEED  
(Statutory)**

**THIS DEED**, executed this \_\_\_\_\_ day of \_\_\_\_\_, 2007, by **LEE COUNTY, FLORIDA, A POLITICAL SUBDIVISION AND CHARTER COUNTY OF THE STATE OF FLORIDA**, whose address is Post Office Box 398, Fort Myers, Florida 33902-0398, Grantor, to **Gulf Coast Jewish Family Services, Inc.**, a Florida Not for Profit Corporation, whose address is 14041 Icot Boulevard, Clearwater, FL 33760, Grantee.

**WITNESSETH:** The COUNTY, for and in consideration of the sum of Ten Dollars (\$10.00) to it in hand paid by the Grantee, receipt whereof is hereby acknowledged, has granted, bargained and sold to the Grantee, its heirs and assigns forever, the following described land, lying and being in Lee County, Florida:

**CAMPBELL ACRES UNIT 3 PB 29 PG 104 LOT 84**, as recorded in Plat Book 29 at Page 103 more commonly described as: 801 Zana Drive, Fort Myers, Florida (Property).

In accordance with Florida Statutes s. 270.11, the COUNTY hereby reserves an undivided three-fourths interest in, and title in and to an undivided three-fourths interest in, all the phosphate, minerals, and metals that are or may be in, on, or under the subject land and an undivided one-half interest in all the petroleum that is or may be in, on, or under the subject land with the privilege to mine and develop each interest. Provided, however, the right of entry with respect to any interest in phosphate, minerals, metals or petroleum reserved in favor of the County is hereby released if the subject parcel being conveyed is or has always been a contiguous tract of less than 20 acres in the aggregate under the same ownership.

**This conveyance is Subject to the covenants, restrictions and reservations in EXHIBIT "B".**

By acceptance of this deed the Grantee accepts and agrees to comply with these covenants, restrictions and reservations.

In the even the Grantee fails to use the property for the purposes set forth herein expressly or by reference, the ownership of the property will, at the Grantor's option and upon Grantor's written notification to Grantee, revert to the Grantor.

This grant conveys only the interest of the County and its Board of County Commissioners in the property herein described, and does not warrant the title or represent any state of facts concerning the title.

**IN WITNESS WHEREOF** the COUNTY has caused these presents to be executed in its name by its Board of County Commissioners acting by the Chair or Vice Chair of said Board, the day and year above.

(OFFICIAL SEAL)

ATTEST:  
CHARLIE GREEN, CLERK

LEE COUNTY, FLORIDA, BY ITS  
BOARD OF COUNTY  
COMMISSIONERS

By: \_\_\_\_\_  
Deputy Clerk

By: \_\_\_\_\_  
Chair or Vice Chair

APPROVED AS TO FORM:

By: \_\_\_\_\_  
Office of County Attorney

## **Exhibit B**

### **DECLARATION OF RESTRICTIVE COVENANTS**

1. This Declaration is in furtherance of and incorporates the Transfer of Property Agreement and all obligations thereunder entered into between the County and Gulf Coast Jewish Family Services , Inc Gulf Coast Jewish Family Services , Inc. dated \_\_\_\_\_.
2. GRANTEE, its successors or assigns, shall operate the supportive housing throughout a period of fifteen (15) years commencing on the date of recordation of the deed and Declaration of Restrictive Covenants.
3. GRANTEE agrees to maintain no more than a twenty percent (10%) vacancy rate as established and awarded by the Lee County Department of Human Services. At such a time this vacancy rate may not be upheld, GRANTEE must provide documentation of good faith effort to procure tenants and Lee County Department of Human Services may evaluate and restructure vacancy rate as deemed appropriate.
4. In the event the GRANTEE fails to use the property for the purposes set forth herein expressly or by reference, the ownership of the property will, at the GRANTOR's option, revert to the GRANTOR.
5. GRANTEE agrees to maintain Property in compliance with local codes and to a safe, decent and sanitary condition, which shall include repairs and maintenance duties to the Property to extend the life of the dwelling. Further, GRANTEE agrees to comply with all local, State and Federal requirements specific to funding sources attached to this property as instructed by the Lee County Department of Human Services.
6. If, pursuant to a request from the GRANTEE, the County determines that the project is no longer needed for use as supportive housing, the County may authorize the GRANTEE, its successors or assigns, or convert the use of the project for the direct benefit of low-income persons.
7. The County may approve such action as may be necessary to allow the transfer, conveyance, assignment, leasing, mortgaging or encumbering of the Property or to accomplish the acts described above.
8. This Declaration and the covenants set forth herein regulating and restricting the use and occupancy of the Property (i) shall be and are covenants running with the Property, encumbering the Property for the term of this Declaration, and binding, upon the Recipient's successors in title and all subsequent owners of the Property, (ii) are not merely personal covenants of the Recipient, and (iii) shall bind the Recipient and its respective successors and assigns during the term of this Declaration.

9. Any and all requirements of the laws of the State of Florida to be satisfied in order for the provisions of this Declaration to constitute deed restrictions and covenants running with the land shall be deemed to be satisfied in full, and that any requirements or privileges of estate are intended to be satisfied, or in the alternate, that an equitable servitude has been created to ensure that these restrictions run with the land.
10. The invalidity of any clause, part or provision of this Declaration shall not affect the validity of the remaining portions thereof.

For the term of this Declaration, each and every contract, deed, or other instrument hereafter executed conveying the property or portion thereof shall expressly provide that such conveyance is subject to this Declaration, provided, however, that these covenants contained herein shall survive and be effective regardless of whether such contracts, deed or other instrument conveyance is subject to this Declaration.

Upon expiration of the period during which the GRANTEE is obligated to operate the Property in accordance with the Agreement, this Declaration shall terminate and shall no longer be effective.

(Balance of Page Intentionally Left Blank)

## TRANSFER OF PROPERTY AGREEMENT

This Agreement is entered into this \_\_\_\_\_ day of \_\_\_\_\_, 2007 by Lee County, a political subdivision and Charter County of the State of Florida herein after referred to as "COUNTY" and Gulf Coast Jewish Family Services, Inc. GRANTEE, regarding the transfer and usage of 801 Zana Drive, Fort Myers, Florida (Property). More commonly described as:

Lot 84, CAMPBELL ACRES, UNIT 3, A Subdivision According to the Plat of Map thereof as Recorded in Plat Book 29 at Page 103, of the Public Records of Lee County, Florida.

The purpose of the Agreement is to ensure the provision of supportive housing for Lee County residents, as defined in the Request for Proposals attached hereto, and incorporated by reference as Exhibit "C" and as awarded by the Lee County Department of Human Services, and as enforced by the Declaration of Restrictive Covenants (Declaration) attached hereto as Exhibit "B".

GRANTEE agrees to maintain Property in compliance with local codes and to a safe, decent and sanitary condition, which shall include repairs and maintenance duties to the Property to extend the life of the dwelling. Further, GRANTEE agrees to comply with all local, State and Federal requirements specific to funding sources attached to this property as instructed by the Lee County Department of Human Services.

GRANTEE agrees to maintain Property as supportive housing for a period of fifteen (15) years, pursuant to the terms of the Declaration. Within thirty (30) days from the date of this Agreement, COUNTY will execute a County Deed in favor of GRANTEE. A copy of which is attached hereto as Exhibit "A".

GRANTEE, its successors or assigns, shall operate the supportive housing throughout a period of fifteen (15) years commencing on the date of recordation of the deed and Declaration of Restrictive Covenants.

GRANTEE agrees to maintain no more than a ten percent (10%) vacancy rate as established and awarded by the Lee County Department of Human Services. At such a time this vacancy rate may not be upheld, GRANTEE must provide documentation of good faith effort to procure tenants and Lee County Department of Human Services may evaluate and restructure vacancy rate as deemed appropriate.

If, pursuant to a request from the GRANTEE, the County determines that the project is no longer needed for use as supportive housing, the County may authorize the GRANTEE, its successors or assigns, or convert the use of the project for the direct benefit of low-income persons.



The County may approve such action as may be necessary to allow the transfer, conveyance, assignment, leasing, mortgaging or encumbering of the Property or to accomplish the acts described above.

Request for project alteration or agreement termination shall be initiated by GRANTEE, and submitted to Lee County Department of Human Services for review and approval, as defined in the Declaration of Restrictive Covenants.

Accepted by:

GRANTEE

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Witnessed:

\_\_\_\_\_  
Witness Signature

\_\_\_\_\_  
Witness Printed Name

\_\_\_\_\_  
Witness Signature

\_\_\_\_\_  
Witness Printed Name

Accepted by:

Lee County Department of Human Services

By: \_\_\_\_\_  
Karen B. Hawes, Director

Date: \_\_\_\_\_

Witnessed:

\_\_\_\_\_  
Witness Signature

\_\_\_\_\_  
Witness Printed Name

\_\_\_\_\_  
Witness Signature

\_\_\_\_\_  
Witness Printed Name



**GULF COAST JEWISH  
FAMILY SERVICES, INC.**



Telephone (727) 538-7150  
Facsimile (727) 535-4774  
Toll Free (800) 888-5066  
Hearing Impaired Service (800) 955-8771

14041 ICOT Boulevard • Clearwater, FL 33760 • INTERNET: [www.gcjfs.org](http://www.gcjfs.org)

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June 22, 2006

Ms. Marsha Popkey  
Lee County Department of Human Services  
Housing Services Program  
2440 Thompson Street  
Fort Myers, Florida 33901

**Re: East Fort Myers Project**

Dear Ms. Popkey:

Gulf Coast Community Services is excited about being selected as a finalist in Lee County's request for Housing Services and have enclosed a more detailed proposal for the East Fort Myers Project. We look forward to having an opportunity to provide such an essential to service within the Fort Myers community.

Our mission is to offer property management and coordination with other agencies to ensure services are available to assist members of our community maintain reasonably independent lives.

Please do not hesitate to communicate with me should you have any questions.

Sincerely,

Michael A. Bernstein  
President/CEO

enclosure

Gulf Coast Jewish Family Services, Inc., is a beneficiary Agency of the Jewish Federation of Pinellas County, Inc. Funding is also received from Pinellas, Hillsborough and Pasco Counties; the Cities of Clearwater, St. Petersburg, Largo and Tampa/HOPWA; Sarasota Family YMCA; Heartland for Children; Central Florida Behavioral Health Network; WorkNet Pinellas; Pasco-Pinellas Public Defender; Children's Board of Hillsborough; Ounce of Prevention Fund; Dept. of Elder Affairs, Dept. of Management Services, Alliance for Human Services, Agency for Health Care Administration; Homeless Coalition of Pasco County; Emergency Food and Shelter Program; U.S. Administration for Children & Families; U.S. Office of Refugee Resettlement; U.S. Administration on Aging; United Nations Voluntary Fund for Victims of Torture; Florida Refugee Services; and the Conference on Material Claims Against Germany.

Member of World Council for Jewish Communal Service; Association of Jewish Family and Children's Agencies; International Association of Jewish Vocational Services; National Consortium of Torture Treatment Programs; American Society on Aging; Florida Association of Aging Services Providers; National Practitioner's Network for Fathers and Families; Florida Council for Community Mental Health; Florida Families First; Central Florida Behavioral Health Network; and Florida Advocates for Community Care for Disabled Adults.



**GULF COAST COMMUNITY CARE  
EAST FORT MYERS PROJECT (10 UNITS)  
PROJECT NARRATIVE  
JUNE 22, 2006**

As expressed in our original proposal, Gulf Coast Community Care (Gulf Coast) is interested in developing supported housing in Lee County. We are proposing that our organization assume ownership and management responsibilities for the housing that is part of the East Fort Myers Project, which we understand will include the following properties:

- 3-bedroom/2 bath single family home located at 169 Lucille Avenue, Fort Myers
- 3-bedroom/2 bath single family home located at 323 Buena Vista Boulevard, Fort Myers
- 4-bedroom/2 bath single family home located at 801 Zana Drive, Fort Myers

Gulf Coast has administered housing programs for more than 14 years and residential services since 1980. Our property management expertise includes, but is not limited to, marketing, developing leases, collecting and accounting for rent, completing maintenance and repairs, and ensuring persons have access to needed support services. Today, we manage 118 apartment units for persons with low income who are elderly or disabled, five congregate living facilities with 70 beds, and more than 200 beds through through Alternative Family Programs (AFP). Housing services provided by Gulf Coast are located in Hillsborough, Pinellas, Pasco, Manatee, Sarasota, DeSoto, Polk, Hardee, Highlands and Broward Counties. Gulf Coast's ability to develop and operate these units is attributed to our commitment to meet the needs of our most vulnerable citizens, and our success in building partnerships with other community-based and government agencies in order to better meet the needs of all clients. Gulf Coast has demonstrated leadership and community involvement and has the experience to provide the housing services as described in this proposal.

**STRATEGY FOR RENTING UNITS**

The East Fort Myers Project includes three properties with a total of 10 bedroom units. Gulf Coast is proposing to match eligible persons who will become roommates. Persons will pay no more than 30% of their income for rent. Subsidy will be accessed, as needed, for those individuals whose income is not sufficient to pay the entire amount. The maximum rent that will be collected for each home will not exceed the Fair Market Rent. Residents will be required to contribute to the utility costs, which may also be subsidized.

Gulf Coast will enter into a Collaboration Agreement with community behavioral health care providers and other organizations as appropriate to coordinate education and outreach to persons targeted for residency. This Agreement will detail the responsibilities of each organization, clarify the referral process, and document the availability of community support and treatment services. Persons seeking occupancy in this project will be given an overview of the criteria for residency, responsibilities of residency, and support services available to assist individuals

maintain housing. To be eligible, persons must meet the income requirements and have a documented disability with priority given to persons with severe and persistent mental illness. Secondary priority will be given to persons who meet HUD's definition of being homeless and persons with prior residency in the neighborhood, provided that these individuals have a disability. The income requirements are detailed below:

<b>Number of Units By AMI</b>		<b><u>50% AMI or Less</u></b>	<b><u>80% AMI or Less</u></b>
Maximum Income/Units Required at AMI		\$19,600	\$31,350
169 Lucille Avenue	3/2 single family home	2	1
323 Buena Vista Blvd.	3/2 single family home	2	1
801 Zana Drive	4/2 remodeled	3	1

If the individual meets the criteria he/she will be asked to complete an application, submit documentation of their income and disability, and sign release for completion of a background check. The results of the background check will be used to assist in determining eligibility. A problem with the individual's credit, previous criminal activity, or tenancy in other properties will not necessarily deny access to the project. Approval of the individual's application will be based on meeting the project eligibility requirements, requirements by the provider making available rental subsidy, zoning requirements, if any, that may restrict occupancy, and the project's ability to meet the individual's needs. We expect that the majority of those served will have income less than 30% of the AMI and will require assistance in obtaining a rental subsidy that is available through several programs.

Each person approved will sign a Rental Agreement for a private bedroom and access to the common areas of the home. Rental Agreements will be written in language easily understood by the residents, and will detail the residents' responsibilities and the responsibilities of Gulf Coast. Persons will be solely responsible for their personal space and will share housekeeping responsibilities for the other living areas. Gulf Coast will be responsible for all pest control, outside maintenance, maintenance of major appliances, structural repairs, maintenance of the interior of the home related to normal wear and tear, to include periodically painting the interior and replacing carpet or tile when necessary. Residents will be expected to comply with all terms and community (house) rules included in the Rental Agreement. This includes those terms you would expect to find in a typical commercial lease such as payment responsibilities and consequences for non-payment or late payments, use of the premises, access by Gulf Coast, and resident's right to quiet enjoyment of the premises. The Resident will not be required to enter into a long-term Agreement in order to provide opportunity for the individual to adjust to the living situation without feeling burdened by a long-term commitment. Residents may remain in housing for as long as they meet the eligibility requirements; however, there may be limitations on rental subsidy accessed for those whose income is not sufficient to pay the full amount of rent without contributing greater than 30% of their income. The individuals' continued eligibility for the project will be reviewed at the time the Rental Agreement is renewed, and at least annually.

It is recognized that residents may need assistance in complying with the terms of the Rental Agreement; therefore, the Rental Agreement will allow flexibility and ensure residents receive the necessary support to assist them in complying with the terms of the Agreement. Should it become necessary to evict someone the principles of due process will be followed, which minimally include

- ✓ Written notice to the resident containing a clear statement of the reason for the termination;
- ✓ A review of the decision, during which the resident has the opportunity to present written or verbal objections before someone other than the person (or a subordinate of the person) who made or approved the termination decision; and
- ✓ Prompt written notice of the final decision to the resident.

Residents will not be required to participate in supportive services as a condition of residency in the project but will be encouraged to participate in those programs that may be beneficial for maintaining stability and maximizing their potential for greater self-sufficiency. Participation in treatment and support services may be a requirement for receipt of rental subsidy.

If the individual meets all the eligibility criteria and there are no current vacancies, the individual will be assisted with other alternatives that may be available. If the individual chooses, his/her name will be placed on a waiting list. If the individual's application is not accepted, a written justification will be provided with notice that the decision may be appealed.

#### **OUTREACH PLAN TO IDENTIFY ELIGIBLE TENANTS/RESIDENT**

**TARGET POPULATION** - The project will primarily target single persons who are over 18 years of age who meet the income criteria and have a severe and persistent mental illness, defined as having a history of previous psychiatric hospitalization, long-standing symptomatology, who are at high risk of repeated psychiatric hospital admissions and have marked interpersonal and/or behavioral problems that substantially impede the individual's ability to live independently without appropriate support services.

Secondary priority is given to persons who meet HUD's definition of being homeless and persons who previously resided in the neighborhood, provided they also have a disability, with mental illness being the higher priority. Being homeless is defined as lacking fixed, regular, and adequate night-time residence, sleeping in homeless shelters, or in places not fit for humans to live, or about to sleep in one of the above situations due to an imminent eviction from a private dwelling (within one week); or release from a hospital or other institution after having been in the facility for less than 30 days with no resources or supports to obtain housing.

**OUTREACH** - Gulf Coast will identify persons eligible for the project through education and outreach to the community mental health agencies including Ruth Cooper Center for Behavioral Health Care and Coastal Behavioral Healthcare, Psychotherapeutic Services, Inc., substance abuse agencies serving persons with co-occurring disorders, such as, Southwest Florida Addiction Services, and the Lee County Homeless Coalition. The primary source of referrals is expected to come from either of the two Florida Assertive Community Treatment Teams serving



Lee County operated by Coastal Behavioral Healthcare and Psychotherapeutic Services, and the Resource Coordination/Community Support Team operated by Ruth Cooper Center for Behavioral Health Care. Gulf Coast will distribute written information and provide presentations about the project, the eligibility criteria and application process to community agencies. Staff of these organizations will be responsible for informing persons served by their organization who may be interested in making application for the proposed housing. All materials distributed will be written in language easily understood by the target population, culturally sensitive, and will be offered in both English and Spanish. Because Gulf Coast operates extensive programming for refugees we have experience in obtaining translators for other languages if it becomes necessary.

#### **SUPPORTIVE SERVICES REQUIRED TO MAINTAIN HOUSING**

Gulf Coast will enter into a Collaboration Agreement with *Ruth Cooper Center for Behavioral Health Care, Coastal Behavioral Healthcare, and Psychotherapeutic Services, Inc.* that will detail the responsibilities of the community support agency and Gulf Coast. *Copies of letters from Ruth Cooper Center for Behavioral Health Center and Psychotherapeutic Services, Inc documenting their commitment to work with Gulf Coast are included in this proposal.* Written commitment for Coastal Behavioral Healthcare is expected but was not received in time for inclusion in this proposal. Case managers or other treatment personnel will have primary responsibility for assisting residents move into the home, and for ensuring access to needed resources to achieve and maintain optimal mental health, remain housed, and increase their self sufficiency. Services needed by the resident will be identified through a person-centered assessment. A service plan will be developed with the individual that addresses their identified needs and role recovery. Case managers or other treatment personnel will provide service and support directly or will link residents to community resources identified in their plan, and will provide on-going evaluation of the effectiveness of those services, revising the plan as needed. Case managers will serve as advocates and help persons speak to their doctor to ensure prescribed treatment is integrated into their lifestyle, basically improving the likelihood of continued compliance. Assistance will be arranged for those who require help with homemaking skills and other skills required for integrating into the community. Case managers or other treatment personnel will assist persons become familiar with the neighborhood, the available transportation, how to use Leetran transit services and how to get a rider discount card, and the location of grocery stores, pharmacies, recreational centers, schools, and social service agencies. To ensure stable income and support, Case managers or other treatment personnel will assist persons in accessing rental subsidy, entitlements benefits, and supported employment and other vocational services for those with a desire to work. Case managers and/or other treatment personnel will be in regular contact with residents to ensure they remain connected to services and adhere to the prescribed treatment regime.

Gulf Coast will be responsible for marketing the project, development of the Rental Agreement, reviewing the terms of the lease and ensuring the individual understands his/her responsibilities, collecting rent, attending to property maintenance, assisting with identification of rental subsidy, and working with the treatment staff to ensure residents have the services they need to ensure their success in the project. Gulf Coast will also be responsible for orienting residents to the home, providing instruction in the use of household appliances, development of a plan to respond

to emergencies including, but not limited to hurricane, flood, tornado, and fire, as well as how to report maintenance and equipment problems, and how to file a complaint.

Support and treatment services needed to assist people obtain and maintain their housing in the community and achieve self sufficiency include, but are not limited to, case management, health care, mental health treatment, substance abuse services, medication and education about their illness and treatment, education and/or job training, peer support, food and transportation. Living with roommates will provide opportunity to foster peer support systems but will also challenge the individual to develop good communication and interpersonal skills. Treatment services will help persons to be able to adjust to the increased demands of independent living, be comfortable with their fears and apprehensions about their circumstances, have an understanding of their illness, and develop interpersonal relationships. While participation in treatment and support services is not a condition of residency, residents will be encouraged to adhere to prescribed treatment to support their recovery, avoid hospitalization, and remain in the community.

**Ruth Cooper Center for Behavioral Health Care** has provided community behavioral health care since 1969 and is the largest provider of mental health services in the area. The organization's **Resource Coordination/Community Support Team** will refer persons to the program and provide or arrange the services needed to maintain living in the community. The Team provides coordination and linking to needed community resources and services, as well as advocacy services at the main campus, in the home, and community settings. Other programs offered that will be available based on need and eligibility for the service include:

<b>Emergency Services</b>	Provides assessment and referral services for adults and children over age four experiencing a mental health or substance abuse emergency.
<b>Crisis Stabilization</b>	Provides inpatient crisis stabilization and support for persons who are either at risk of harming themselves or others due to mental health crisis.
<b>New Wings Drop-in Center</b>	A place where persons with mental illnesses or substance abuse problems go for socialization, relaxation, education, support and peer support.
<b>Pathways to Recovery</b>	Provides training and education to enable adults with a diagnosis of Schizophrenia or Mood Disorder to function more independently in the community. Supports individuals in obtaining meaningful life roles such as employee, student, or creating a new life in sobriety.
<b>Supported Employment Services</b>	Provides support in identifying present employment skills, development of job skills, seeking jobs, and maintaining employment.
<b>Outpatient Psychiatric Services</b>	Provides pharmacological intervention to adults and children with mental illnesses at the main campus and satellite offices.
<b>Outpatient Adult Therapy Services</b>	Provides individual, couples, and marital therapy for adults age 18 and over. Social rehabilitation and group therapies are available for individuals diagnosed with Schizophrenia or Mood Disorders.
<b>Warm Line</b>	A phone line staffed with trained consumers that provide support and practical assistance in problem-solving and accessing resources.

Both *Coastal Behavioral Healthcare and Psychotherapeutic Services* offer Assertive Community Treatment and will refer persons served by their programs to this project and will continue services throughout the individual's tenancy. The *Florida Assertive Community Treatment (FACT) Teams* use a multidisciplinary team approach to provide long-term intensive, community-based treatment, rehabilitation, and support services for persons with severe and persistent psychiatric disabilities. The FACT Team includes a psychiatrist, nurses, therapists, case managers, vocational counselors, substance abuse counselors, and a peer counselor. Persons targeted for participation are hard-to-reach and not adequately served in the traditional service system, are at high risk of repeated psychiatric hospital admissions, prolonged hospitalization, or repeated admission to crisis stabilization units. The program goal is the reduction of debilitating symptoms of mental illness; preventing or minimizing recurrent acute episodes of illness; meeting basic needs and enhancing the quality of life; improving functioning in social and employment roles and activities; increasing time spent in meaningful activity in the community, and improving social relationships with family members and friends. Additional mental health services provided by Coastal Behavioral Healthcare include outpatient counseling, medication management, and substance abuse treatment.

*Other community resources that may be accessed by the Resource Coordination/Community Support Team and treating personnel of the FACT Teams include, but are not limited to, the following:*

<i>Visually Impaired Persons of Southwest Florida</i>	Provides independent living training and life-enhancing services for blind and severely visually impaired individuals.
<i>Catholic Charities Haitian Center</i>	Provides services that promote and instill in Haitian individuals and families, an attitude of self-determination and a capacity for optimal social functioning.
<i>Catholic Charities Hispanic Services</i>	Provides services that promote and instill in Hispanic individuals and families an attitude of self-determination and a capacity for optimal social functioning and self-sufficiency.
<i>Center for Independent Living</i>	Helps individuals with disabilities achieve and maintain independent life styles.
<i>NAMI</i>	Local Chapter of the National Alliance for the Mentally Ill that provides support groups, advocacy and education to families, caregivers and individuals who are negatively impacted by mental illness.
<i>American Red Cross, Lee County Chapter</i>	Helps people avoid, prepare for, and cope with emergencies and natural disasters.
<i>Goodwill Industries of Southwest Florida</i>	Actively assists people with disabilities and other special needs to maximize their employment potential and realize the benefits of the power of work.



<i>Consumer Credit Counseling Service of the Florida Gulf Coast</i>	Provides free counseling for families and individuals on budgeting and orderly debt repayment. Provides community programs on proper credit use.
<i>Harry Chapin Food Banks of Southwest Florida</i>	Operates a warehouse of donated foods, household and personal items for agencies that serve the needy.
<i>Partners for Breast Cancer Care</i>	Provides low-income women with breast screening and cancer treatments using 109 physicians and 6 hospitals.
<i>Island Coast AIDS Network</i>	Works to prevent the spread of HIV in Lee County and provides services for infected people.
<i>Lee County Legal Aid Society</i>	Provides legal services to the indigent in the area of family law.
<i>Southwest Florida Addiction Services</i>	Provides residential and outpatient services for adults impacted by alcohol and other drug abuse.
<i>Abuse Counseling &amp; Treatment</i>	Provides shelter, counseling, and support services to adult and youth victims of domestic violence and rape.
<i>Good Wheels</i>	Coordinates and provides cost effective and reliable transportation to the disadvantaged, disabled, those working to gain economic self-sufficiency, and the general public.
<i>Lee County Coalition for a Drug-Free Southwest Florida</i>	Provides drug abuse prevention services and counseling

**MANAGEMENT PLAN**

Gulf Coast's Management Plan for this project addresses *Staffing, Marketing, Screening Applications, Budget, Property Maintenance, and Financial and Administrative Reporting.*

**STAFFING** - The proposed project will be the responsibility of the AFP Team Leader who will be located in Fort Myers. Gulf Coast has leased space from the Ruth Cooper Center for Behavioral Health Care and will be located with many of the services that will be provided by their organization to residents of this project. We are currently recruiting for a qualified person to fill the position of the Team Leader. The individual selected for this position will possess a Bachelor's Degree in the area of Counseling, Psychology, Rehabilitation Counseling or Social Work, with at least two years experience in providing direct service. Experience working with persons with mental illness and in providing supported housing or management of property is preferred. The Team Leader is required to be familiar with the Florida Landlord and Tenant Law and Fair Housing Act. The Team Leader is responsible for marketing, processing applications, developing the lease and renewing leases, calculating rent, collecting rent, arranging for repairs and maintenance, handling resident complaints, handling delinquencies, returned checks and ensuring due process if an eviction if necessary, and ensuring individuals have access to their case manager and other services required to live independently.

The Team Leader works under the supervision of Don McIlvaine, Supportive Services Program Director. This position requires a Master's Degree in Human Service, Business or Public Administration, or a Bachelor's Degree in one or the fields listed above with five years of related experience. Don McIlvaine is the Supportive Services Program Director. He has his Bachelor's Degree in Social Work with many years of experience in the management of social service programs. Don has worked for Gulf Coast for nine years and was the Program Manager for the Support Services Program for two years before becoming the Director. As the Supportive Services Program Director, Don has responsibility for support and supervision of the Team Leader, for assisting and backing up the Team Leader in completion of property management responsibilities and other duties, and to review appeals by persons who were determine ineligible and those who have voiced a complaint in regard to a notice provided to the resident.

There will not be on-site project staff. A 24 hour toll free number will be provided for emergencies. Support services staff will provide on-site services based on the resident's need.

**MARKETING** - Through Collaboration Agreements and outreach efforts to educate the staff of community programs, as described in the proposal, we will identify residents for the project. We will prepare written information about the project for distribution at community meetings and agencies serving persons with severe and persistent mental illness, specifically those agencies with a signed Collaboration Agreement. This information will be in the form of a brochure and flyers. Any written information will be written in language easily understood and will include the fair housing symbol, the funders that made the project possible, and any other required information or logos. The program will be listed on our website.

**SCREENING APPLICATIONS** - The Team Leader will screen applicants to determine eligibility for the project including verification of disability and income. Background checks and previous tenancies are completed to assist in identifying needed support services. Persons who are not eligible are provided written notice and may appeal the decision. When there are no vacant units, anyone determined eligible will be placed on a waiting list if they choose. When there is a waiting list and units are fully occupied we will close to new applications. A log will be maintained of all applications. Priority will be given to persons with severe and persistent mental illness.

**BUDGET** - Gulf Coast operates within a financial plan that ensures stability and long-term financial viability. Services are delivered in an efficient, cost-effective, and financially responsible manner. Gulf Coast has an annual independent audit, which includes an opinion on our financial statements and an assessment of our internal control structure. The agency consistently has been found to be in accordance with *Generally Accepted Accounting Principles*. The project will follow Gulf Coast's financial policies and procedures, which include contracting with vendors, purchasing equipment and supplies, processing invoices, accounting for revenue received and others to control the cost of expenditures and maximize project income.

**PROPERTY MAINTENANCE** - A preventative maintenance plan will be developed to address tasks such as, monthly replacement of the A/C filter, annual inspection of the A/C system, and timely response to resident concerns. The Team Leader will be on-site no less than once monthly to inspect the property. Residents will be educated about conservation of utilities and to report problems noted with leaky faucets, running toilets, other water leaks, and broken windows and appliances. Instruction will be provided in use of all appliances to limit any damage due to improper use. Contracts will be secured for pest control, lawn service, and other property maintenance as required.

**Financial and Administrative Reporting** – Gulf Coast’s Management Information System has the capacity to provide a high-level overview of the whole agency, as well as line item reporting and cost tracking information for specific programs giving us the ability to track the project income and expenses, and produce any required reports. The system includes features such as, accounts receivable, budgeting, cost analysis and reporting, general ledger, inventory, payroll, purchasing, billing, accounts payable, vendor data, and client service data. Custom reports can be generated based on any data in the system.

#### **THREE YEAR OPERATING PRO-FORMA**

Attached is a three year pro-forma for the project. A three percent cost of living increase is included in each of years two and three. Any surplus will be placed in a residual receipts account to be used as replacement reserves. Should there be deficit in the project budget, Gulf Coast will seek additional resources to ensure the project’s success.

# GULF COAST COMMUNITY CARE

12 MONTH BUDGET  
10 UNITS - EAST FORT MYERS

	Year One	Year Two	Year Three
<b><u>Revenue</u></b>			
Rental Income	35,952	37,031	38,141
Vacancy Rate of 10%	(3,595)	(3,703)	(3,814)
Net Rental Income	32,357	33,328	34,327
Other Income (Utility payments)	4,800	4,944	5,092
Vacancy Rate of 10%	(480)	(494)	(509)
Net Other Income	4,320	4,450	4,583
<b>Total Net Revenues</b>	<b>36,677</b>	<b>37,777</b>	<b>38,910</b>
 <b><u>Expenses</u></b>			
Program Manager ( 1% )	450	464	477
AFP Team Leader (20%)	6,000	6,180	6,365
Total Salaries	6,450	6,644	6,843
Fringe Benefits ( 25% of salaries)	1,613	1,661	1,711
Local Travel ( at \$0.35/mile)	1,050	1,050	1,050
Occupancy (office space/utilities/maint)	250	250	250
Telephone (Local/LD/cellular)	84	84	84
Housing Property Maintenance (lawn/pest/utilities/maintenance)	14,170	14,879	15,622
Insurance ( property/general/professional)	5,250	5,775	6,353
Assessments	248	248	248
Advertising (tenants/recruitment)	1,200	1,200	1,200
Background Checks (tenants)	480	480	480
Printing (rental forms)	250	250	250
Total Expenses	24,595	25,876	27,248
<b>TOTAL DIRECT COSTS</b>	<b>31,045</b>	<b>32,520</b>	<b>34,090</b>
Indirect Cost Rate 14%	4,346	4,553	4,773
<b>TOTAL PROGRAM COSTS</b>	<b>35,391</b>	<b>37,073</b>	<b>38,863</b>
 <b>NET INCOME/ (LOSS)</b>	 <b>1,286</b>	 <b>704</b>	 <b>47</b>

# Ruth Cooper CENTER

For Behavioral Health Care  
A PRIVATE, NON-PROFIT CORPORATION

The Mission of the Ruth Cooper Center for Behavioral Health Care is to provide leadership to improve the quality of life in Lee County and surrounding communities by providing health and human services for individuals and families.

June 22, 2006

Mr. Michael A. Bernstein  
President / CEO  
Gulf Coast Community Care  
14041 Icot Blvd.  
Clearwater, FL 33760

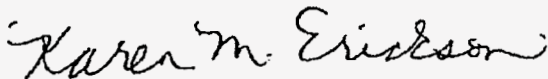
Dear Mr. Bernstein,

This letter is in support of your efforts to provide Affordable Housing for persons with mental illnesses in Lee County. The persons with whom we work usually only have the standard Social Security Benefit amount of \$600 per month, or less, as expendable income. Some wait as long as 2 to 3 years to receive a federal housing subsidy, if they can pass the rigorous screening criteria. Where are they supposed to live while they wait for assistance? And how will they pay for any place to live on their limited income? As you know, these are only some of the daily housing and survival issues faced by persons of extremely low income with mental illnesses.

Ruth Cooper Center currently provides community based mental health casemanagement services to 280 individuals. None of these people can afford current rental housing prices and all of them could benefit from an affordable, decent place to live. The persons we serve are expected to pay their own rent, with some one-time emergency use State funds available, on a limited basis. (For rental housing or utility deposits, or first month's rent, for example.) Though we would not be able to commit to any long term financial (rent payment) supports of the persons in need, we would be available to provide the mental health services and supports to the persons who are selected, and who choose to live, in your housing projects.

Again, we extend our thanks and support to you and your agency and look forward to having more affordable housing options for persons with disabilities in Lee County.

Sincerely,



Karen M. Erickson  
Property Manager  
Finance Department

Board of Directors: James Reilly, Chair • Davy Crockett, Vice Chair • James A. Slusher Ed.D., Treasurer • Joan Cabai, Secretary  
Marshall Bower, Esq. • Carl Joseph Coleman Esq. • Frank Duval, Jr. • Ismael Hernandez • Madelyn L. Isaacs, Ph.D., Past Chair • Ed Kleinow • Kay MacDougall  
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Janet W. Eustis, Chief Executive Officer

Main Campus: 2789 Ortiz Avenue • Fort Myers, FL 33905-7806 • (239) 275-3222 • FAX (239) 275-6037

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[www.ruthcoopercenter.org](http://www.ruthcoopercenter.org)

Funded in part through contracts with the State of Florida: Depts. of Children & Families and Children's Network of Southwest Florida; by the Lee County Board of Commissioners and the United Way of Lee County



Mr. Michael A. Bernstein  
President/CEO  
Gulf Coast Community Care  
14041 Icot Blvd.  
Clearwater, Florida 33760

June 22, 2006

Dear Mr. Bernstein:

Thank you for this opportunity to work with Gulf Coast Community Care to provide affordable housing for persons with severe and persistent mental illness living in Lee County. Psychotherapeutic Services of Florida operates a Florida Assertive Community Treatment (FACT) Team serving persons in Lee County who have severe and persistent mental illness. We will be happy to provide those served by our FACT Team with information about the housing being offered by Gulf Coast in Lee County.

The individual will be the one to choose the type of housing arrangements and location where they wish to live. The FACT Team will provide direct services and support to those individuals who elect to reside in any of the housing projects operated by Gulf Coast and a financial subsidy is available for those individuals who do not have sufficient income to pay the total monthly rent.

Florida Assertive Community Treatment (FACT) is designed to promote psychiatric and physical health, independent living, supportive relationships, and the opportunity to be an active member of their community. Through direct services and supports provided by the FACT Team we expect to lessen the debilitating symptoms of mental illness; prevent or minimize recurrent acute episodes of illness; improve the individual's functioning in social, employment, and interpersonal roles and relationships; and overall enhance their quality of life.

Given the lack of affordable housing and desire by some individuals to live with roommates we expect that some persons will select the housing offered. I look forward to working with Gulf Coast. Please let me know if there is anything else I may do to support your project.

Sincerely,

  
Terry Bartz, PSF Operations Officer

Psychotherapeutic Services of Florida  
4251 Henderson Blvd.  
Tampa, FL 33629  
813-349-3991



801 Zana Dr  
Fort Myers FL  
33905-4069 US

Notes:

**PRINT DON'T REPRINT.**

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