

Within this report, Lee County identified several impediments to fair housing and these include:

1. Lee County has done little to affirmatively further fair housing.
2. Lee County has not defined what “affirmatively furthering fair housing” means for its citizens.
3. Lee County has no organizations dedicated to fair housing.
4. Survey results show that most residents are not familiar with “fair housing” issues.
5. Lee County has assigned almost no CDBG funds to affirmatively further fair housing.
6. There are several examples of the “not in my backyard (NIMBY) attitude in Lee County.

Of these six impediments, The Diocese of Venice is positively impacting several. The following is how the Sponsor’s involvement in the Section 811 program has actively reduced identified impediments.

- Response to Impediments 1, 2, 3, & 4 — The Diocese of Venice has actively marketed rental units to residents regardless of their ethnic origin. The Diocese success of 20 percent of its residents being minorities is attributed to: i) The Diocese extensive outreach and networking with minority community-based organization; ii) The Diocese aggressive affirmative marketing program; iii) The Diocese willingness to sensitize staff on fair housing issues by sponsoring and paying for a fair housing workshop; and iv) by The Diocese placing projects in both mixed race and non-mixed race areas.
- Response to Impediments 1, 2, 3, & 4 — The Diocese of Venice success has resulted in a definition of fair housing. In the Diocese terms, this is when minorities are represented in terms of those receiving services or apartments in numbers at or above the portion of the minority population to the total population.
- Response to Impediments 6 — The Diocese of Venice has not backed down from challenges to neighbors, and has actively pursued the rights of residents. For example, the Diocese progressed through public hearings and received some opposition. The Diocese met with this opposition to articulate the projects and its impact upon neighboring land owners. As a result of this education and outreach process, the opposition was reversed to support for the project.

It is clear from these examples that the Diocese of Venice has been at the forefront of promoting fair housing to residents regardless of their ethnic origin.

## **Conclusion**

HUD has indicated the methodology in which projects will be rated is as follows.

The suitability of the site from the standpoints of promoting a greater choice of housing opportunities for minorities and persons with disabilities and affirmatively furthering fair housing. In reviewing this criterion, HUD will assess whether the site meets the site and neighborhood standards at 24 CFR 891.125(b) and (c) by examining relevant data in your application or in the HUD Office. If appropriate, HUD may visit the site.

The site will be deemed acceptable if it increases housing choice and opportunity by:

Expanding housing opportunities in non-minority neighborhoods if located in such a neighborhood. ("Non-minority area" is defined as one in which the minority population is lower than 10 percent.)

Within the market area, projects are located both inside and outside of areas of minority concentration. **The proposed project is located in a non-minority area and should be awarded the full points.**

**Support Letters and Minority Letters  
Can be Found in Exhibit 3 (d)**

**Additional Information On:**

**Holy Cross Catholic Church  
Catholic Charities  
Catholic Volunteers**

**CAN BE FOUND IN EXHIBIT 3a**

## 3(c) Government Support

## EXHIBIT 3(c) Other Funding Sources

The NOFA addresses the Sponsor's ability to secure other funding sources and community resources that can be combined with HUD's program resources to achieve program purposes. Submit information responding to this factor in accordance with Application Submission Requirements in Exhibits 3(a), 3(b), 3(c), 3(d), 3(e), and 5(b) of Section IV.B. of this NOFA.

(2 points) The extent to which you have described your plans for expanding economic opportunities for low- and very-low income persons (provisions of Section 3). **Note:** To receive up to 2 points, the applicant must have adequately addressed the following in Exhibit 3(k) of the application. Refer to the General Section for further information.

- (1 point). Provide opportunities to train and employ low- and very low-income residents of the project area.
- (1 point). Award substantial contracts to persons residing in the project area.

For this funding application, points are awarded in the following fashion:

<u>Percent of Award</u>	<u>Supplement Funding Dollar Amount</u>	<u>Points Awarded</u>
5% or less	\$477,900	0
6-10%	\$477,901 - \$955,980	1
11-15%	\$955,981 - \$1,433,970	2
16-20%	\$1,433,971 - \$1,911,960	3
21-25%	\$1,911,961 - \$2,389,950	4
Over 25%	\$2,389,951+	5

- (0 point). The application contains general support and/or written evidence of firm commitments towards the development and operation of the proposed project (including, financial assistance, donation of land, provision of services, etc.) from other funding sources (e.g., private local community and government sources) where the dollar value totals 5% or less of the capital advance amount as determined by HUD.
- (1 point). The application contains written evidence of firm commitments towards the development and operation of the proposed project (including, financial assistance, donation of land, provision of services, etc.) from other

funding sources [e.g., private local community and government sources) where the dollar value total between 6% and 10% of the capital advance amount as determined by HUD.

- (2 points). Where the dollar value totals 11 % and 15% of the capital advance amount as determined by HUD.
- (3 points). Where the dollar value totals between 16% and 20% of the capital advance amount as determined by HUD.
- (4 points). Where the dollar value totals between 21 % and 25% of the capital advance amount as determined by HUD.
- (5 points). Where the dollar value totals over 25% of the capital advance amount as determined by HUD.

The Sponsor has financial commitments the following:

<u>Survey</u>	<u>Amount</u>
Lee County Direct Support (a)	
Lee County Expedited Permit Review (b)	
Lee County Impact Fee Reduction (c)	
Senior Friendship Center/Catholic Charities (d)	
Senior Friendship Center/Catholic Charities (e)	
Sponsor Equity Contribution (f)	
Senior Friendship Center/Catholic Charities (g)	
<b>Total Contribution</b>	

- (a) The County has pledged direct financial support for an increase of 24 units on the proposed site (see attached letter).
- (b) The County offers expedited permit review. Although this is an important benefit, it is difficult to quantify this impact, thus \$0 is listed.
- (c) The County reduces impact fees (see attached letter). The estimated value of this is as follows:

<u>Fee</u>	<u>Savings per/unit</u>	<u>Total Savings</u>
Road	3,261	221,748
Park	591	40,188
Regional Park	518	35,224
EMS	71	4,828
School	1,624	110,432
Fire	321	21,828
Admin. Fee	1%	4,342
<b>Total</b>		<b>438,590</b>

- (d) It is estimated that 40% of all residents will access community dinner four times a week. This cost per meal is \$12.50 for a total value of \$65,200.
- (e) It is estimated that this organization will provide 14 educational seminars annually at a total cost of \$500 per seminar, or a value of \$7,000.

(f) The Sponsor is aware that they will incur the following off-site costs associated with developing this site and is committing to pay for these from land proceeds:

Pave Appaloosa to Lee County standards for local roads	\$60,000
Extend sewer to lift station	\$30,000
Extend sewer lines from church to lift station	\$20,000
Church connection fees paid to Lee County Utilities	\$53,000
	\$163,000

(g) The following table summarizes the projected participation and value these services:

<u>Service</u>	<u>Percent Residents Using</u>	<u>No. Residents Using</u>	<u>Usage Per Resident Per Wk.</u>	<u>Cost Per Unit of Service</u>	<u>Total Value</u>
Case Management	40%	27	1	\$75	\$105,000
In-Home Svcs.	35%	24	2	\$150	\$374,000
In-Home Counseling	20%	14	1/2	\$150	\$55,000
Prescription Payment	75%	51	1	\$15	\$40,000
Adult Day Care	25%	17	2	\$300	\$530,000
Elder Helpline	—	—	—	—	\$25,000
Total					\$1,344,000

***Based on the sliding scale previously presented, the Sponsor is documenting supplemental funding of over 25 percent and should receive full points.***

**Lee County  
Commitment Letters**



**LEE COUNTY**  
SOUTHWEST FLORIDA

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Examiner

April 08, 2009

John Hazelroth, Project Consultant  
JPH Associates, Inc.  
P.O. Box 948006  
Maitland, FL 32794

Re: Diocese of Venice  
HUD Section 202 Funding Application  
13060 Palomino Lane, Fort Myers, FL STRAP # 22-45-25-00-00001.0100

Dear Mr. Hazelroth:

The following incentives have been instituted for the direct benefit of projects such as that proposed by the Diocese of Venice, and if approved, may act to directly reduce the total cost of the project. This letter outlines general incentives for projects such as this but is not a substitute for a zoning verification letter.

Lee County provides funding assistance for Rental/Special Needs Projects using State Housing Initiatives Partnership (SHIP) Program funds. Actual grant award agreements are executed during the fiscal year the monies are to be awarded.

The Lee County Comprehensive Plan "The Lee Plan" says in Policy 135.1.5: (Lee County will) "Continue to provide financial and technical support, including expedited permit processing, the payment, waiver, or reduction of impact fees; the purchase of tax certificates for building lots; site preparation; and the construction of infrastructure by participating on a partnership basis with providers of housing that is affordable to very low, low and moderate income families or individuals, including those with special needs such as the elderly, handicapped, large families, farm workers, and the homeless".

In addition, Policy 100.4.9 of the Lee Plan says (Lee County will) "Give priority to the special needs populations as defined in Rule 67-37.002(30) with inadequate housing in recognition of the even greater problems faced by the private sector in providing this needed type of housing".

With regards to Road Impact Fees, Section 2-266 of the Lee County Land Development Code provides a separate category for payment of impact fees for projects meeting the following definition:

*Elderly/disabled housing* means dwelling units qualified to receive Federal assistance through Section 202 (supportive housing for the elderly, authorized under the Housing Act of 1959, Section 210 of the Housing and Community Development Act of 1974, and the National Affordable Housing Act) or Section 811 (supportive housing for persons with disabilities, authorized under the National Affordable Housing Act of 1990, as amended by the Housing and Community Development Act of 1992, the Rescission Act and the American Homeownership and Opportunity Act of 2000) programs.

Sections 2-306, and 2-346 of the Lee County Land Development Code also have provisions for the reduction of impact fees for Regional and Community Parks, reading in part:

“The person applying for the issuance of a building permit, mobile home move-on permit or recreational vehicle development order may opt to submit evidence to the county manager indicating that the fees set out in subsection (a) of this section are not applicable to the particular development. Based upon convincing and competent evidence, which must be prepared and submitted in accordance with the county administrative code, the county manager may adjust the fee to that appropriate for the particular development.”

Section 2-412 of the Lee County Land Development Code provisions for the exemption of impact fees for Schools, reading in part:

The following are exempted from payment of the school impact fee:

“Dwelling units in subdivisions, mobile home or manufactured housing parks, and multi-family dwellings that are operated as a community for older persons, in compliance with the terms and provisions of the Federal Fair Housing Act, Title VIII of the Civil Rights Act of 1968, as amended by the Fair Housing Amendments Act of 1988 and the Housing for Older Persons Act of 1995, 42 U.S.C., § 3601 through 3619, that also prohibit persons under the age of 18 years from residing within the dwelling units on the property as a permanent resident. This restriction must be evidenced by a recorded declaration of covenants and restrictions that are not subject to revocation or amendment for a period of at least 30 years from the date of recording. The covenants and restrictions must run with the land.”

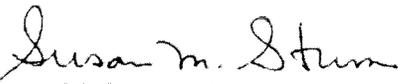
Lee County’s Local Housing Assistance Plan further states that development of special needs housing is an eligible activity and is considered as rental or special needs rental housing construction or rehabilitation. Ten percent of SHIP funds are to be earmarked for special needs strategies or recipients. Eligible activities include the construction or rehabilitation of housing for persons who have special housing needs. These include, but are not necessarily limited to persons with developmental disabilities, persons with mental illness/substance abuse, persons with AIDS and HIV disease, runaway and abandoned youth, farm workers, the homeless, the elderly and persons with disabilities. New construction, acquisition, permitting, pre-development, minor or major rehabilitation, weatherization, code compliance, emergency repairs, accessibility for persons with disabilities, emergency move in assistance, and conversions are eligible activities. Special needs housing facilities are not restricted as to geographic location but may be located anywhere within Lee County – including the cities of Fort Myers and Cape Coral.

The Planning Division of the Lee County Department of Community Development provides technical assistance to developers of Affordable Housing Developments (AHDs). Developers of AHDs in unincorporated Lee County may apply to the Lee County Planning Division for a Certificate of Housing Affordability (CHA) that will entitle AHDs to receive expedited permit processing. A copy of the CHA will be attached to each county permit for which the AHD developer is applying. A copy of the CHA is also entered into Tidemark – Lee County's permit tracking software. This assures that the AHD will be expedited to a greater degree than other projects.

If you have any questions, please contact feel free to call me at (239) 533-8549 or e-mail me at [strumsm@leegov.com](mailto:strumsm@leegov.com).

Sincerely,

DEPARTMENT OF COMMUNITY DEVELOPMENT

  
Susan M. Strum, AICP, Senior Planner  
Division of Planning

xc: Paul O'Connor, AICP, Director, Planning Division  
Gloria M. Sajgo, AICP, Principal Planner  
Matt Noble, AICP, Principal Planner



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County Hearing  
Examiner

June 15, 2009

Ms. Veronica Martin  
TDM Consulting, Inc.  
6810 Porto Fino Circle  
Fort Myers, FL. 33912

Re: Blessed Pope John XXIII DCI2009-00015 Amendment

Dear Ms. Martin:

It is Lee County's understanding that the developers of the above mentioned senior housing development is seeking Federal HUD grant funding. The Lee County Board of County Commissioners have agreed to provide a \$600,000 local grant. The project includes a proposed 3 story 68 unit building.

The current Future Land Use designation of the site is Outlying Suburban. This land use category permits the requested use and density. The current zoning classification of the property is CFPD. The property owner is currently amending the schedule of uses to incorporate the proposed 68 unit building. This application has been deemed "sufficient," and has been scheduled for a public hearing with the Hearing Examiner on August 5<sup>th</sup>, 2009. Lee County staff is recommending that the amendment to accommodate the proposed 68 unit building be approved.

If I can be of further assistance in this matter, do not hesitate to call me at (239) 533-8309.

Sincerely,  
**DEPT. OF COMMUNITY DEVELOPMENT**  
**Division of Planning**

Paul O'Connor, AICP, Director

cc: Anthony Palermo, Division of Zoning  
Susan Strum, Division of Planning  
John Hazelroth

**Diocese of Venice  
Commitment Letter**



**DIOCESE OF VENICE IN FLORIDA**  
*Office of the Chancellor*

September 24, 2009

Jim Branson  
Multifamily Division  
US Department of HUD  
Charles Bennett Federal Building  
400 W Bay Street, Suite 1015  
Jacksonville, FL 32202-1015

RE: Commitment to Pay Off-Site Costs  
Sponsor: Diocese of Venice (Dun No. 147051296)  
Project: Blessed Pope John XXIII Manor, Ft. Myers FL

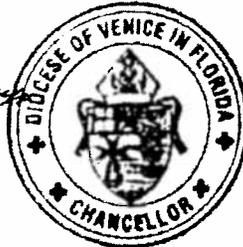
Dear Mr. Branson:

The Sponsor understands that the HUD funding cannot be used to pay for the cost to rezone the property nor to pay for off-site expenses. This letter shall serve as a commitment from the Diocese to Venice to pay for these costs, as described on the attached sheet. The Diocese will likely pay for these from land proceeds received in conjunction with this project.

The Diocese has enjoyed a strong working relationship with the HUD office in Jacksonville for many years and it is our hopes that we will again have the opportunity to work with your office on another HUD Section 202 project.

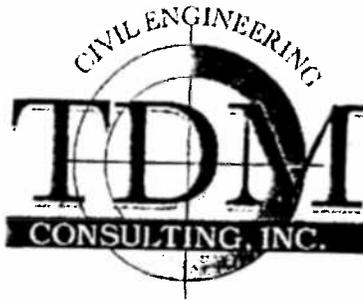
Sincerely yours,

Dr. Volodymyr Smeryk  
Chancellor



Enclosure

cc: Father Bob Tabbert



6810 Porto Fino Circle  
Fort Myers, FL 33912  
Phone 239-433-4231 Fax 239-433-9632  
www.tdmcivilengineering.com

March 6, 2009

Reference: Blessed Pope John XXIII

COST ESTIMATE

Zoning:	
Updated Boundary Survey	\$ 3,500
Updated Environmental and Protected Species Survey	\$ 2,900
TDM Consulting fees	\$21,500
Submittal fee to Lee County BOCC	\$ 9,576
Total	\$37,476
Estimates on Anticipated Site Improvements:	
Pave Appaloosa to Lee County standards for local roads	\$50,000-\$60,000
Pave interior shell road to Lee County standards for private roads	\$45,000-\$55,000
Extend sewer to lift station	\$20,000-\$30,000
Extend sewer lines from church to lift station	\$15,000-\$20,000
Church connection fees paid to Lee County Utilities	\$53,000
Total	\$130,000-\$218,000



3600 Evans Ave.  
Fort Myers, FL 33901  
(239) 275-1881

September 25, 2009

Rev. Robert D. Tabbert  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Fort Myers, FL 33912

Re: Local Support Services for HUD Section 202 Project  
Project: Pope John XXIII Manor, Lee County

Dear Rev. Tabbert:

It is our understanding that your organization is seeking funding from the US Department of HUD to construct independent/affordable housing for seniors. We applaud your efforts and hope you are successful in this venture.

It is also to our understanding that you are seeking a letter of support, which indicates some of the services which would be available for these new residents. Our organization coordinates and provides a host of support services for the elderly. The following are some of the services provided and which would be available to your new residents if they meet eligibility requirements:

- Care Management
- In-Home Services
- Transportation
- Home Delivered Meals
- Congregate Dining/activities at sites throughout Lee Co.
- Adult Day Service
- Health and Wellness
- Caregiver support services
- Volunteer Programs

We estimate the value of these services which we provide to average \$10/hr to \$50/hr. As you can see, we are quite supportive of this project and hope to be able to serve your residents. Again, we wish you the best of luck in your application process.

Sincerely,  
*Nancy Green- Irwin*

Nancy Green-Irwin  
Executive Director

**Intent to Provide Services**

## 3(d) Letters of Support

## **EXHIBIT 3(d) Letters of Support**

As with all projects sponsored by the Diocese, it is done in conjunction with a local parish. The Diocese has long realized that residents are positively impacted when associating a local church with a housing project. The local church is able to provide support services that are located in close proximity, so that the elderly residents may utilize these.

### **GRASS ROOTS ORGANIZATION**

As with all projects sponsored by the Diocese, it is done in conjunction with a local parish. The Diocese has long realized that residents are positively impacted when associating a local church with a housing project. The local church is able to provide support services that are located in close proximity, so that the elderly residents may utilize these.

The U.S. Department of HUD considers an organization a "grass roots organization" if the organization is headquartered in the local community to which it provides services; and,

- i) Has a social services budget of \$300,000\* or less, or
- ii) Has six or fewer full-time equivalent employees.

\* The cap includes only that portion of an organization's budget allocated to providing social services and does not include other portions of the budget such as salaries and expenses.

In the instance of the proposed applicant, this organization meets the definition of a "grass roots organization". This test is met in two distinct ways. First, the property will be located adjacent to Blessed Pope John XXIII Catholic Church. This grass roots organization serves the local community both spiritually and through the direct provision of supportive services.

As with all projects sponsored by the Diocese, it is done in conjunction with a local parish. The Diocese has long realized that residents are positively impacted when associating a local church with a housing project. The local church is able to provide support services that are located in close proximity, so that the elderly residents may utilize these.

In the case of Blessed Pope John XXIII, this parish was established in 2002. The church has a variety of programs, which include;

- Thrift Store
- Emergency Assistance Program
- Hispanic Outreach
- Jesus the Worker Hispanic Mission Church
- Knights of Columbus
- Soup Kitchen
- Edge Middle School
- High School Youth Group
- Vacation Bible Study
- Blessed Little Angels Playgroup

The church also provides a community room which is used for meetings and gatherings. This would be available for elderly residents at the proposed Section 202 project.

In addition to the local parish, Catholic Charities of the Diocese of Venice provides numerous programs/services throughout Lee County. Additional documentation on Catholic Charities is provided later in this exhibit.

Secondly, the Diocese of Venice can also be considered a grass roots organization. The Diocese is located in and provides direct support services to a defined service area. This local service area is confined to a multiple county region in the Gulfcoast area of Florida. When separating out its social service budget/staff, this organization also meets the HUD definition, as stated.

It is through this grass roots philosophy and organizational structure that the Sponsor has been able to effectively and efficiently serve the residents of individual communities.

#### **NON-HOUSING PROGRAMS/SERVICES OF THE DIOCESE**

In addition to the housing facilities, the Diocese oversees many other programs and/or facilities. The following is a list of programs and/or facilities of the Diocese of Venice.

- Campus Ministry Office
- Father William S. Balfe Memorial Library
- Haitian Ministry
- Hispanic Apostolates
- HIV/AIDS Ministry
- Migrant Education
- Ministry to Blacks
- Office of Family Life

- Haitian
- Laity
- Older Catholics
- Peace & Justice
- Persons with Disabilities
- Scouting
- Office of Prison Ministries
- Office of Youth Ministry
- Older Catholic Ministry
- Pastoral Ministries
  - Bereavement
  - Charismatic
  - Critical Concerns
  - Divorced or Separated
- Scouting Office
- St. Vincent de Paul
- Various High School and Grade Schools

Many of these programs/services are coordinated through Catholic Charities.

## **CATHOLIC CHARITIES**

The social service arm of the Diocese of Venice is Catholic Charities. The thrust of Catholic Charities is to promote the dignity of every human person who resides within the five-county area of this Diocese by implementing the social dimension of the gospels through the delivery of human services, social advocacy, and convening.

During the year 2008, Catholic Charities provided social services to over 48,000 people in the ten-county Diocese of Venice area. The daunting task of serving needy children, struggling families, lonely elderly, migrant workers and their families, is accomplished by the hard work of a small but committed professional staff supported by a corps of dedicated volunteers and the assistance of thousands of donors, benefactors and friends. Last year's accomplishments included:

- Assisted 27,467 individuals in economic hardship by providing social services including direct assistance, food, clothing, prescription medicines, and case management.
- Promoted freedom of opportunity for 4,227 immigrants and migrants by assisting them with the compliance of U.S. Government regulations.
- Offered educational support to 694 children and 349 adults through one-on-one tutoring and group classes.

- Provided hurricane-related assistance to 611 families devastated by Hurricane Fay.
- Sponsored 245 refugees and their families in their resettlement in Southwest Florida, 83 refugee youth with mentoring services, and provided job training and placement for 2,679 refugees.
- Provided professional, compassionate HIV/AIDS supportive services and education to 818 infected clients and family members.
- Encouraged 989 birth mothers, homeless moms and their children on the road to self-sufficiency.
- Dispensed affordable, professional counseling and addiction services for 1,227 individuals and families in crisis.
- Provided home ownership classes, and housing and foreclosure counseling to 315 families.
- Offered elderly outreach to 262 clients.
- Ensured quality day care and early learning experiences for 49 struggling families.
- Provided affordable housing to 20 mothers and 23 infants/toddlers and 14 HIV/AIDS clients.
- Managed four housing corporations for working poor, special needs, and farm workers in need of an affordable, safe place to live.

Programs provided in Lee County originate out of the Elizabeth Kay Galeana Center of Catholic Charities on Michigan Link Avenue in Ft. Myers.

Although Catholic Charities offers a host of programs and services, some of their best known and most recognized programs involve the minority community. In particular, these programs include:

- Migrant Assistance
- School on Wheels
- Refugee Services
- Housing Assistance
- Hispanic Outreach
- Haitian Outreach
- Food Pantries
- Direct Financial Assistance

The large Hispanic population in the area consists of families who are or have been migrant farm workers. Their work histories frequently change as they migrate to follow the crops. Lack of English skills, due in large part to their mobility, lack of understanding of the financial system, and poor educational background, make them vulnerable to financial and housing abuses. Lee County reports 11,379 foreign-born residents, of which 9,424 are of Hispanic origin. Of the Hispanic residents, 47.5 percent report “not speaking English very well.”

Another key component to Catholic Charities' mission is the goal of enhancing the health and wellness of seniors within the community. Senior Services of Catholic Charities offers ongoing case management to elderly living at Villa San Marcos in Venice and Holy Cross Manor in Palmetto. A service coordinator works with residents of these two low-income apartment complexes to enhance successful aging. Seniors are assessed and linked with area community services and medical providers. On-site educational presentations also are arranged to bring the latest information to residents and their families on health and wellness. In Lee County, Senior Services of Catholic Charities offers a telephone reassurance project, case management, health assessment and coordination of in-home services for low-income seniors who are isolated and/or frail persons. This program is offered out of the Elderly Services of Catholic Charities, located in Ft. Myers. As we will see later, a senior support service program will eventually be operated out of the proposed housing project, Blessed Pope John XXIII Manor.

### **FUND RAISING AND VOLUNTEERS**

The Sponsor's grass roots orientation allows it to attract donations and support from communities and in turn redirects these funds to serve the needy within these communities. Fund raising includes a number of sources and uses for funds, as witnessed below:

#### **Revenues: For Fiscal Year 2007-2008**

Grants and United Ways  
 Contributions  
 Diocese-Catholic Faith Appeal  
 Service Fees  
 Special Events  
 Catholic and Other Organizations  
 All Other  
**Total**



#### **Expenditures: For Fiscal Year 2007-2008**

Direct Assistance/Family Support Services	1,870,200
Refugee/Entrants Services	1,451,419
Specialized Education Services	890,679
Counseling/Pregnancy Services	814,517
Immigration Services	532,433
Shelter Services	516,835

General/Management Services	253,482
All Other	221,804
Fundraising and Newsletter	214,949
<b>Total</b>	<b>6,766,318</b>

### **Catholic Charities Foundation**

One of the most widely recognized fund raising/philanthropic efforts involves the Catholic Charities Foundation. The Foundation was created in 1999 in order to begin the task of building an endowment fund, the proceeds of which will help Catholic Charities to provide uninterrupted services to the poor every year.

Gifts to the Foundation are invested wisely and the interest income will be used to provide help for children and families, to assist migrant farm worker families and give emergency assistance to the poor.

For one in every 28 of our neighbors in the ten-county area of the Diocese of Venice, Catholic Charities is frequently the only hope. Catholic Charities expertly helps people in need without regard to religious preference, race, or economic circumstance. It provides this help through 16 agencies across the ten-county area, with 76 professional caring staff members aided by over 700 dedicated volunteers.

Over the years, the primary source of philanthropic financial support for Catholic Charities programs has come from parishioner's of the Catholic Diocese of Venice through free-will offerings made to the Bishop's Faith Appeal conducted through the local parishes. This vital support now generates more than \$700,000 per year (not including Diocesan donations of goods, services, and use of property) and has accounted for more than one quarter of the Catholic Charities nearly \$3 million annual budget.

However, even though the Bishop's Faith Appeal continues to grow, the population is growing at a dramatic pace, as are the social service needs of more and more people in the area. To relieve these tremendous financial pressures Catholic Charities has begun making a concerted effort to acquire additional private and public grant support.

A number of community leaders have established the Catholic Charities Foundation to lead this effort. The Foundation is building an endowment where the proceeds will be utilized to strengthen existing successful programs and to initiate new strategies to meet emerging social needs.

The provision of help comes in the following ways:

- **Emergency Assistance** – Food, medication, and financial aid, especially to pay rent and utilities for individuals and families.
- **Counseling and Mental Health Services** – Family and marital counseling offered to individuals, couples or in focused peer groups.
- **Pregnant Services** – Housing, support and counseling for pregnant women and young mothers.
- **Refugee Resettlement and Immigration Services** – Reception, reunification with family, education services employment services, health services, language and civic education, housing placement and legal services toward citizenship.
- **Education and Family Support Services** – Family life education, values clarification, parenting education, an tutoring.
- **Social Support Services** – Respite care, transportation services, employment services, friendly visits, case management, and information and referral services.
- **Permanent Housing Service** – Helping low-income families achieve home ownership.

For this purpose the Catholic Charities Foundation has established the following designations:

*For Children*

- Child day care scholarship for a child - 6 months: \$2,250
- Counseling for a child with family related problems - 6 months: \$1,625
- After school tutoring for one under-achieving child - 1 year: \$1,125

*To Support Families*

- Marriage counseling for a family in crisis - 6 months: \$1,500
- Mental health counseling - 1 year; \$3,000
- Respite for a caregiver of a person with Alzheimer's -1year: \$1,250
- Home and job search for one refugee family: \$500

*For Emergency Assistance*

- Medication for an older person's chronic health condition -1 year: \$4,600

- Emergency food for one "working poor" family -1 month: \$900
- Limited financial assistance with rent, utilities or medical supplies: \$500

*For Changing Lives*

- Shelter for a young single mother and her infant -1 year \$12,000
- Home ownership for one family with a low income: \$700
- Citizenship services for an immigrant/migrant farm worker family: \$800

**Volunteers**

The Sponsor depends heavily upon volunteers to further its mission. Volunteers participate in programs offered at the local parish (Blessed Pope John XXIII Catholic Church), in association with Catholic Charities and in association with Catholic Volunteers of Florida.

With respect to Blessed Pope John XXIII, staff estimates that over 300 parishioners volunteer in one form or another. Many of these volunteers assist the elderly and poor within the immediate area.

With respect to Catholic Charities, in 2008 over 700 volunteers gave their time to the needy. This volunteer assistance was essential in serving the needs of over 48,000 residents within the ten-county area.

One additional source of volunteers comes by way of Catholic Volunteers of Florida. Catholic Volunteers of Florida is dedicated to providing people the opportunity to live out their faith by serving those with the greatest need. Catholic Volunteers work towards justice and peace, positively transforming the communities they serve as well as themselves. CVIF contains two groups:

**CVIF LAY VOLUNTEERS** – Those who serve full-time (40 hours per week) for at least one year, and are part of the CVIF service and development program. Through the years this has been a diverse group. Approximately two-thirds of the volunteers have been/are in their mid-20's to early 30's, and one-third over 55 years of age. Volunteers are single, married, widowed, divorced (all without dependents), from all over the United States, and from a variety of cultural and ethnic backgrounds.

**SUPPORT PEOPLE** – Those who assist in all aspects of CVIF operations. This group includes office volunteers, regional contacts, the board of directors, the application review board, training town, donors, supporters, and friends.

CVs are involved in social work, shelters, health care, food banks, legal services, teaching, working with farm workers, senior citizens, and in other fields. Each volunteer's placement is a careful match between their skills and interests, the needs of the service sites and available resources. Placement is made to facilitate each volunteer's response to a "call" service. Full-time volunteerism demands flexibility, commitment and vision-it is much more than a "job" (See attached for information on the CVIF program).

### **HUD HOUSING EXPERIENCE OF THE DIOCESE**

The Diocese of Venice has in operation four Section 202 supportive housing facilities for the elderly, and one under construction. The following is a description of each of the four projects:

- Villa San Carlos is a 50-unit Section 202 housing facility for the elderly located in Port Charlotte, Florida. The Diocese was awarded a Section 202 fund reservation September 30, 1984. The facility went into occupancy October, 1986. The facility is 100 percent occupied with an extensive waiting list. During the twelve years of operation of the facility, there have been no unresolved rental delinquencies. The retained managing agent is SPM, LLC.
- Villa San Carlos II Apartments is a 54-unit Section 202 housing facility for the elderly located in Port Charlotte, Florida. The Diocese was awarded a Section 202 fund reservation February, 1992. The facility went into occupancy July 1995. Villa San Carlos II is 100 percent occupied with a waiting list. There have been no unresolved rental delinquencies. The managing agent is SPM, LLC.
- Casa Santa Marta Is a 78-unit Section 202 housing facility for the elderly located in Sarasota, Florida. The Diocese was awarded a Section 202 fund reservation September, 1980. The facility went into occupancy July, 1982. Casa Santa Marta is 100 percent occupied with an extensive waiting list. The managing agent is SPM, LLC.
- Casa Santa Marta II Apartments is a 52-unit Section 202 housing facility for the elderly located in Sarasota, Florida. The Diocese was awarded a Section 202 fund reservation February, 1992. The facility went into occupancy June, 1995. Casa Santa Marta II is 100 percent occupied with an extensive waiting list. There have been no unresolved rental delinquencies. The managing agent is SPM, LLC.
- Villa San Marcos is a 81-unit Section 202 housing facility for the elderly located in Venice, Florida. The facility went into occupancy in 2002. It is 100 percent occupied with an extensive waiting list. The managing agent is SPM, LLC.
- Villa Vicente is a 68-unit project funded in FY 2001 and will be located in Ft. Myers. The Sponsor is now preparing the firm commitment application for submittal to the HUD

Jacksonville office.

- Holy Cross Manor is a 68-unit project funded in 2003. It is located adjacent to Holy Cross Catholic Church and is 100% occupied. It should be noted that the parish spent over \$200,000 of its own resources to extend utilities for this project.
- Holy Cross Manor II will be another 68-unit project adjacent to Holy Cross Manor. This project was funded in 2008/2009 and construction is projected to commence at the end of 2009.

The success of these projects can be measured by the testimony of their residents. Attached are letters from residents of Casa Santa Marta I and II, Villa San Carlos, and Holy Cross Manor, who comment on the familial atmosphere, the quality of the personnel, and the easy access to neighborhood amenities that the Diocesan housing affords them.

In addition to elderly housing, the Diocese oversees two other housing projects: Clare House in Fort Myers, which provides residence for six single parent families; and Our Mother's House in Venice, which also provides residence for six mothers and their infants. The homes were converted by Catholic Charities from other uses without any assistance from any other State or Federal agency. Both homes are administered by the District Administrators, who possess Master degrees in Social Work.

In Palmetto (Manatee County), the Diocese is providing a HUD-approved home ownership counseling program for low and moderate income households. This program, which is free of charge, is particularly geared to Hispanic/Latino families who seek to purchase their own homes.

## **PAST SPONSOR PERFORMANCE**

The Sponsor has been an active participant in the HUD Section 202 program. The Sponsor has worked diligently to meet HUD mandated submission schedules, as well as project budgets. Following is a summary of this organization's performance regarding the HUD Section 202 program. Of the eight projects (see table on next page), only Holy Cross Manor needed amendment funds. These funds were needed due to the following; i) site conditions increased the cost of site development, primarily due to the need to extend both water and sewer and to utilize a lift station to access a sewer force main; ii) the project was developed during an over-heated real estate and construction market, partly due to several hurricanes driving the cost of construction up over a very short time period; and iii) due to the absence of utilities on the county land, the Sponsor had to annex the site into the City. This process was both time consuming and expensive, but ultimately successful. **None of the eight projects were extended beyond the HUD prescribed period of 24 months for initial closing or 36 months for fund reservation.**

## SUPPORTIVE SERVICES

The Diocese has long realized that the provision of housing is but one element to a senior's existence. By providing a host of support services, the independence of each and every resident is increased and overall health improved. The following is a list of some of the supportive services provided at Diocesan sponsored projects;

- Food Bank – distribution of food to needy residents
- SHARE Volunteer Food Purchase program – Food for needy residents
- Medicare/Medicaid Benefit Counseling
- Monthly Health Screening for Eyes, Ears, and Blood Pressure
- Lifeline Assistance Program Sponsored by Verizon
- Liaison Services for the Deaf and Blind
- Assistance With the Purchase/Delivery of Prescription Medicine
- Meals on Wheels
- On-site Social and Recreational Programs
- Coordinating Transportation for Residents
- Nutritional Education and Consultation

These services are supplemented by services provided by Catholic Charities. In 1968, the Diocese established Catholic Charities to provide social and economic services to the needy of the community. With help from the Diocese, the United States Catholic Conference, and Lee County, Catholic Charities provides the following services for the elderly in residents;

- **The "Care Connection" Respite Program** is located at Our Lady of Grace Catholic Church in Beverly Hills, Citrus County, Florida. The mission of the "Care Connection" Respite program is to provide a quality, caring, community, center-based, professional caregiver respite program for individuals affected with Alzheimer's and other dementia related illness residing in Citrus County. The program provides affordable respite services one half-day per week. Other services available through the program include assessment, case management, care givers' support groups, clinical counseling, health screenings, as well as community information and referral. Funding for this program has been provided in part by a grant from the Brookdale/FAVOR Foundation.
- **The Interfaith Care givers Program** is an innovative, collaborative partnership between Catholic Charities and the Interfaith Coalition of Hernando County, Inc. The mission of the Interfaith Care givers Program is to provide elder care education and support services to congregational communities of all faiths in Hernando County. The program's initial goal is to provide education and training on elder issues to church communities in Hernando County. In addition, the program provides volunteer training and technical support to existing and new church-based ministries for the care of the Elderly.
- **The Elder care Program** is a volunteer-based program providing services to low income elderly who are homebound. Through a volunteer-client match, the program provides

visitation; telephone support; assistance with food shopping or essential errands; light meal preparation; light housekeeping; small repairs; and transportation to obtain essential services, among others. An extensive library of resources is available for elderly and their families. The Elder care Program through its Parish Connections component further provides technical assistance, workshops and speaker's bureau for Catholic Parishes wishing to begin or expand their parish-based elder care programs.

Supplementing the experience and wide-range of elder programs/services is Blessed Pope John XXIII Catholic Church. As with all projects sponsored by the Diocese, it is done in conjunction with a local parish. The Diocese has long realized that residents are positively impacted when associating a local church with a housing project. The local church is able to provide support services that are located in close proximity, so that the elderly residents may utilize these.

In the case of Blessed Pope John XXIII, this parish was established in 2002. The church has a variety of programs, which include;

- Thrift Store
- Emergency Assistance Program
- Hispanic Outreach
- Jesus the Worker Hispanic Mission Church
- Knights of Columbus
- Soup Kitchen
- Edge Middle School
- High School Youth Group
- Vacation Bible Study
- Blessed Little Angels Playgroup

The church also provides a community room which is used for meetings and gatherings. This would be available for elderly residents at the proposed Section 202 project.

## **OUTREACH TO THE MINORITY COMMUNITY**

The FHEO division of HUD looks at five factors when evaluating an applicant's outreach to the community. A total of 15 points is possible for sponsors that can demonstrate, to FHEO's satisfaction, involvement and outreach to the minority as judged by the following factors:

- 1(b)(1) — Experience in providing housing and/or support services to minorities
- 1(b)(2) — Document relationship over time with minority residents and the minority community.
- 3(c) — Suitability of the site, in that it provides opportunities to minorities
- 2(b) — Document that the project involves elements of such planning documents as the "Impediments to Fair Housing".
- 3(e) — The inclusion of the target population in development of the application

The following paragraphs demonstrate how the Sponsor affirmatively answers each of these FHEO factors.

The Sponsor has a long history of outreach to the minority community. This outreach effort starts with the Sponsor's efforts to hire minorities and continues with finding ways to better serve the minority community. This brief narrative addresses some of the needs within the minority community and how the Sponsors has responded or plans to respond to these needs. Evidence of the Sponsor's ties with the minority community is demonstrated by support letters, which can be found in Exhibit 3(d).

The Sponsor is keenly aware of its responsibility to serve residents of Lee County, regardless of their income, family status, race or sex. This narrative presents why the Sponsor has and will continue to aggressively serve all residents of the County.

The Diocese of Venice has a long history of serving elderly persons, regardless of ethnic origin. A review of the Sponsor's housing experience (at its existing Section 202 projects), shows that over 57 percent of all projects have a minority residential population which exceed that in the market area. This reveals that the Sponsor has been effective in promoting housing opportunities for minorities and encouraging minority elderly to avail themselves of such opportunity.

***Ties to the Elderly and Minority Community:*** In addition to its elderly housing, the Sponsor has addressed the needs of the elderly via establishing a Commission for Older Catholics. This Commission seeks to coordinate and facilitate an ever increasing demand for services and spiritual support to the elderly. Outreach programs for the elderly, such as "Senior's Society" at St. Vincent de Paul Church, continue to be promoted on the parish level In an effort to meet the needs of this growing population.

On a more local level, Blessed Pope John XXIII offers senior programs in which seniors can participate in recreational, social, educational, and direct assistance services. In addition, a **Senior Elderly Advisory Committee** has been assembled to provide input into the HUD 202 application process. **This Committee is made up with both minority/non-minority elderly residents from both inside/outside of Blessed Pope John XXIII Catholic Church. The inaugural meeting was held at Blessed Pope John XXIII's sister parish, Jesus the Worker Hispanic Mission Church in Ft. Myers. Meeting minutes and sign-in sheets are attached.**

In addition, the Sponsor has secured multiple letters from minority residents which demonstrate the Sponsor's commitment and sensitivity to the needs of an ethnically diverse resident population.

As mentioned earlier in this exhibit, the Diocese's commitment to the minority population is most evident in its ministry and service to the migrant farm workers (Hispanics and Haitians)

with programs and outreach activities conducted throughout the ten-county regions. Social services and religious education programs as well as advocacy roles and legalization classes are but a few of the services currently provided, within the adjacent Blessed Pope John XXIII Church. **This congregation has a history of reaching out to minority residents through programs which include; (i) direct assistance to Spanish migrant farm workers; (ii) bilingual masses and social service programs; and (iii) partnerships with the local minority churches, which include offering programs and facilities for the use of these churches.**

**Sponsor Facilities:** The following is a list of affordable elderly projects, owned/operated by the Sponsor, and a description of the neighborhoods these facilities are located in. *It should be noted that at over 70 percent of all Sponsor facilities, the minority population at the facility is equal to or greater than the minority population within the neighborhood. This is a testament of the Sponsor's ability to aggressively market units to all residents regardless of their ethnic origin.*

**Diocese of Venice – Survey of Sponsor Supported Senior Housing**

<u>Project Name/Address</u>	<u>Age</u>	<u>Type</u>	<u>Total Units</u>	<u>Percentage Occupancy</u>	<u>Minority Residents</u>	<u>Wait List</u>	<u>Census Tract Neighborhood</u>	<u>% Minority within Tract</u>
Villa San Carlos 2550 Easy Street Port Charlotte, FL 33952	1986	HUD 202	49	100%	8%	6-8 mo	208 Mixed	9%
Villa San Carlos II 22250 Vick Street Port Charlotte, FL 33980	1995	HUD 202 PRAC	52	100%	37%	1-1 ½ yr	210 Non-minority	5%
Casa Santa Marta 1576 8 <sup>th</sup> Street Sarasota, FL 34236	1982	HUD 202	78	100%	13%	1 ½ yr	1.01 Mixed	13%
Casa Santa Marta II 800 N. Lemon Avenue Sarasota, FL 34236	1995	HUD 202 PRAC	54	100%	20%	2 yr	1.01 Minority	13%
Villa San Marcos 13031 Palm Beach Blvd Ft. Myers, FL 33905	2002	HUD 202 PRAC	81	100%	2%	1 yr	302 Non-minority	11%
Villa Vincente 13031 Palm Beach Blvd Ft. Myers, FL 33905	2004	HUD 202 PRAC	60	100%	11%	9 months	302 Mixed	11%
Holy Cross Manor 504 26 <sup>th</sup> Street Palmetto, FL 34221	2006	HUD 202 PRAC	68	100%	8% (a)	1 yr	14.01/2/2.52 Non-minority	0%
Holy Cross Manor II 504 26 <sup>th</sup> Street Palmetto, FL 34221	NA(b)	HUD 202 PRAC	68	NA	NA	NA	14.01/2/2.52 Non-minority	0%
<b>TOTAL/AVG</b>	—	—	510	—	16%	—	—	16%

(a) The City of Palmetto total minority population is 2.5 percent.  
 (b) Construction to start Fall 2009.

**Need For Housing Amongst Minority Residents:** The 2000 Census indicates a disproportionately greater need regarding the correction of housing problems for minority households in Lee County. However, this is due to the income disparity that is also indicated in the 2000 Census. While the County's minority households represented 12 percent, minorities represent a much greater percentage of low-income households. However, other variables such as tenure and household type and size also play a significant role in this regard, as noted below in the following chart.

**Promoting Greater Housing Opportunities for Minorities:** There are nine (9) HUD-assisted housing projects for low-income elderly in Lee County. Two of the existing projects are located in areas of minority concentrations, four are located in neighborhoods with a mixed population and three are located in non-minority areas. The following is a summary of each of these projects.

<u>Project Name/Address</u>	<u>Type</u>	<u>Total Units</u>	<u>Percentage Occupancy</u>	<u>Waiting List</u>	<u>Census Tract</u>	<u>% Minority</u>
Ft. Myers Presbyterian Community 1925 Virginia Ave Fort Myers, FL 33901 239-332-1050	HUD 202	180	100%	9 mo.	8	10%
Palm City Garden Apts 1625 Marsh Ave Ft. Myers, FL 33905 239-334-1303	HUD 202	100	100%	9 mo.	5.04	44%
Sandpiper Run 2075 Collier Ave Fort Myers, FL 33901 239-931-0220	HUD 202 PRAC	59	100%	1yr.	11	50%
Villa Vincente 13071 Palm Beach Blvd Fort Myers, FL 33905 239-693-1333	HUD 202 PRAC	60	100%	6 mo.	302	13%
Sunshine Villas 1200 Broad St W Lehigh Acres, FL 33936 239-369-9161	HUD 202	216	100%	6 mo.	403.04	16%
Sunshine Villas South 1291 Broad St W Lehigh Acres, FL 33936 239-369-9161	HUD 236	80	100%	6 mo.	403.4	16%
Woodward Manor 1301 Woodward Ct Lehigh Acres, FL 33936 239-369-1414	HUD 202	102	100%	1 yr.	403.04	16%

Hatton Rogers Apts 4250 Hatton B Rogers N. Fort Myers, FL 33903 239-995-6100	HUD 202 PRAC	54	100%	1 1/2 yr.	208	2%
Palm Harbor Apts 1081 Palm Ave N. Fort Myers, FL 33903 239-995-2600	HUD 202	81	100%	1 yr.	206	6%
<b>TOTAL</b>		<b>932</b>				
Lee County's Minority Population is 12.3%						

This is a situation where there is existing HUD-assisted housing for the elderly in both minority and non-minority areas. The proposed project would be located in Census Tract 401.06, which is a non-minority census tract.

The Sponsor will continue (with the proposed site) to promote and provide housing opportunities for minority elderly residents in the following three ways. Because the project is located adjacent to census tracts of minority concentration, minority residents will have easy access to this project. The Sponsor is dedicated to both the letter and spirit of equal opportunity. Secondly, a review of the Sponsor's housing experience at other sites reveals that the Sponsor will be effective in promoting housing opportunities for minorities and encouraging minority elderly to avail themselves of such opportunity. Third, Blessed Pope John XXIII enjoys a close working relationship with the Hispanic communities via their sister parish of Jesus the Worker Hispanic Mission Church in Ft. Myers. Outreach efforts will involve partnering with this church.

**Sponsor Experience in Fair Housing:** Individual property managers regularly attend fair housing training. Attached to this Fair Housing Narrative are details on this training.

#### **Relationship with Minority Residents Organizations over Time**

Serving minority residents and working with minority organizations is not something that the Sponsor started recently. This idea is integrated to the Sponsor's mission and has been done since its inception. As previously noted, most all of the Sponsor's projects and/or programs serve minority populations at or greater than that which exists within the market place. The Sponsor has been able to achieve these results by utilizing minority-based newspapers when placing ads and by partnering with minority organizations to distribute project information and brochures.

At the end of this section are samples of Affirmative Fair Housing Marketing Plans and newspaper ads placed in minority papers. The following is a sample list of some selected organizations and papers the Sponsor utilizes when reaching out to minority residents.

- Hispanic American Alliance (Hispanic)
- Tempo Magazine (African-American)
- NAACP (African-American)
- North River News (African-American)
- Neighbors (African-American)
- Filipino American Association of SW Florida (Hispanic)

### **Fair Housing Impediments**

The purpose of designing and implementing the Analysis of Impediments to Fair Housing for Lee County (AI) was to fulfill the Certifications made by Lee County BOCC in its Consolidated Plan. The AI represents year one's accomplishment of a Five-Year Fair Housing Strategic Plan. Lee County's AI was based on a model fair housing analysis provided by HUD to county staff at a Fair Housing Workshop in early October 1995. The AI included a review of Lee County's demographics related to housing patterns by race. It also reviewed lending practices, availability of fair housing information, knowledge of fair housing practices, availability of public transportation in relation to work areas and other socio-economic factors, and reported the results two community-wide surveys regarding fair housing issues.

The AI revealed the need for an easier method for citizens to file fair housing complaints, and that the present county ordinance could be enforced more effectively. Certain historical factors attribute to this situation, viz. Lee County has not taken fair housing complaints since 1993. HUD has recently provided guidance emphasizing that fair housing ordinances be substantially equivalent to the federal Fair Housing Law, and/or that grantee jurisdictions have programs that affirmatively further fair housing. In spite of Lee County's previous approach to fair housing, which included minimal educational outreach, the focus was on taking complaints. Merely taking complaints was not pro-active enough, according to HUD, to meet the standards of affirmatively furthering fair housing for Lee County residents. As a result, Lee County is actively providing fair housing education, training, education, outreach and awareness initiatives in its attempt to address these issues.

The AI further revealed the absence of a fair housing program, which was evident from the public's survey responses -- most respondents were not aware of fair housing issues. Survey questions focused on the public's perception of property appraisers, bankers, real estate professionals, and others in the housing business. Respondents generally favored county government becoming more pro-actively involved in the development of a fair housing program. Two other factors impacting fair housing in Lee County were decent, affordable, rental housing opportunities for migrants and/or farm workers, and substandard housing conditions in existing communities. These issues require pro-active measures in order to respond to critical areas of

unmet need, as identified by the public. The AI concluded that county staff will develop program options for a core-service fair housing program. Currently, 80 grantee jurisdictions in the United States have a substantially equivalent fair housing ordinance. The AI suggests doing a program review of these jurisdictions in order to develop and implement a well-rounded Lee County program.

Within this report, Lee County identified several impediments to fair housing and these include:

1. Lee County has done little to affirmatively further fair housing.
2. Lee County has not defined what “affirmatively furthering fair housing” means for its citizens.
3. Lee County has no organizations dedicated to fair housing.
4. Survey results show that most residents are not familiar with “fair housing” issues.
5. Lee County has assigned almost no CDBG funds to affirmatively further fair housing.
6. There are several examples of the “not in my backyard (NIMBY) attitude in Lee County.

Of these six impediments, The Diocese of Venice is positively impacting several. The following is how the Sponsor’s involvement in the Section 811 program has actively reduced identified impediments.

- Response to Impediments 1, 2, 3, & 4 — The Diocese of Venice has actively marketed rental units to residents regardless of their ethnic origin. The Diocese success of 20 percent of its residents being minorities is attributed to: i) The Diocese extensive outreach and networking with minority community-based organization; ii) The Diocese aggressive affirmative marketing program; iii) The Diocese willingness to sensitize staff on fair housing issues by sponsoring and paying for a fair housing workshop; and iv) by The Diocese placing projects in both mixed race and non-mixed race areas.
- Response to Impediments 1, 2, 3, & 4 — The Diocese of Venice success has resulted in a definition of fair housing. In the Diocese terms, this is when minorities are represented in terms of those receiving services or apartments in numbers at or above the portion of the minority population to the total population.
- Response to Impediments 6 — The Diocese of Venice has not backed down from challenges to neighbors, and has actively pursued the rights of residents. For example, the Diocese progressed through public hearings and received some opposition. The Diocese met with this opposition to articulate the projects and its impact upon neighboring land owners. As a result of this education and outreach process, the opposition was reversed to support for the project.

It is clear from these examples that the Diocese of Venice has been at the forefront of promoting fair housing to residents regardless of their ethnic origin.

### **Conclusion**

HUD has indicated the methodology in which projects will be rated is as follows.

The suitability of the site from the standpoints of promoting a greater choice of housing opportunities for minorities and persons with disabilities and affirmatively furthering fair housing. In reviewing this criterion, HUD will assess whether the site meets the site and neighborhood standards at 24 CFR 891.125(b) and (c) by examining relevant data in your application or in the HUD Office. If appropriate, HUD may visit the site.

The site will be deemed acceptable if it increases housing choice and opportunity by:

Expanding housing opportunities in non-minority neighborhoods if located in such a neighborhood. ("Non-minority area" is defined as one in which the minority population is lower than 10 percent.)

Within the market area, projects are located both inside and outside of areas of minority concentration. **The proposed project is located in a non-minority area and should be awarded the full points.**

## **COMMUNITY SUPPORT LETTERS**

- A. Intent to Provide Services**
- B. Minority Individuals/Organizations**
- C. Tenant Letters**
- D. General Support Letters**



3600 Evans Ave.  
Fort Myers, Fl. 33901  
(239) 275-1881

September 25, 2009

Rev. Robert D. Tabbert  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Fort Myers, Fl. 33912

Re: Local Support Services for HUD Section 202 Project  
Project: Pope John XXIII Manor, Lee County

Dear Rev. Tabbert:

It is our understanding that your organization is seeking funding from the US Department of HUD to construct independent/affordable housing for seniors. We applaud your efforts and hope you are successful in this venture.

It is also to our understanding that you are seeking a letter of support, which indicates some of the services which would be available for these new residents. Our organization coordinates and provides a host of support services for the elderly. The following are some of the services provided and which would be available to your new residents if they meet eligibility requirements:

- Care Management
- In-Home Services
- Transportation
- Home Delivered Meals
- Congregate Dining/activities at sites throughout Lee Co.
- Adult Day Service
- Health and Wellness
- Caregiver support services
- Volunteer Programs

We estimate the value of these services which we provide to average \$10/hr to \$50/hr. As you can see, we are quite supportive of this project and hope to be able to serve your residents. Again, we wish you the best of luck in your application process.

Sincerely,  
*Nancy Green-Irwin*

Nancy Green-Irwin  
Executive Director

**Intent to Provide Services**



JEWISH FAMILY & CHILDREN'S SERVICES  
OF SARASOTA-MANATEE, INC.

HARRY & JEANETTE  
WEINBERG CAMPUS

2688 Praterville Road  
Lacrosse, FL 34287  
(941) 366-3334  
Fax (941) 966-2592  
www.jfcs-care.org

Seniorsmen Family  
Life Enhancement Center  
Seniorsmen Family  
Administrative Center  
Golden Feldman Building  
Miriam J. and Margot E. Covitz  
Counseling Center  
Ann and Alfred Goldstein  
Program Wing

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Alice Tish

**PRESIDENT AND CEO**

Rose Chapman, LCSW

September 17, 2009

Diocese of Venice:

Jewish Family and Children's Service is actively engaged in helping seniors to age in place in their own communities. Through our NORC (Naturally Occurring Retirement Communities) program, our staff has connected with the residents at Villa San Marcos to provide weekly activities, supportive counseling, lunches, exercise classes, day trips, and health and wellness events to improve their quality of life. Our program targets seniors who are low income and live in subsidized housing communities. Villa San Marcos is an example of the type of housing that is critically needed for the older adults in our community to enable them to live in an affordable, safe, secure, active environment.

We applaud and support your efforts to expand the availability of comparable housing facilities in the community. Our agency looks forward to the possibility of expanding our NORC supportive services program as we work together to positively impact the lives of our senior residents.

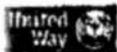
Very sincerely,

Pamela Baron, MSW

Director of Senior Services, JFCS

**INTENT TO PROVIDE  
SUPPORTIVE SERVICES**

"When you can't do it alone"





**Catholic Charities  
Diocese of Venice, Inc**  
*District II*  
*Serving Lee County*

May 26, 2009

**DISTRICT II  
ADMINISTRATION**  
4235 Michigan Link Ave.  
Fort Myers, FL 33916  
239.334.4007 Phone  
239.334.3707 Fax

**The Elizabeth Kay  
Galeana Center**  
4235 Michigan Link Ave.  
Fort Myers, FL 33916  
239-337-4193 Phone  
239-332-2799 Fax

**Catholic Charities  
Community Services**  
*[Haitian, Immigration and  
Elderly Services]*  
5597 Sunrise Drive  
Fort Myers, FL 33919  
239-334-2234 Phone  
239-334-2707 Fax

**Bonita Springs Social  
Service Center**  
27050 Old 41 Road  
Bonita Springs FL 34135  
239-390-2928 Phone  
239-948-0647 Fax

**Human Trafficking and  
Refugee Resettlement  
Services**  
3430 Cleveland Ave.  
Fort Myers, FL 33901  
239-322-1077 Phone  
239-322-1280 Fax

**INTENT TO PROVIDE  
SUPPORTIVE SERVICES**

Destiny Ministries of SWFL  
Destiny Diaper Bank  
1510 SE 46th Lane  
Cape Coral, FL 33904

To Whom It May Concern:

Senior Connections, a supportive living program for the elderly, of Catholic Charities Diocese of Venice, Inc., expresses its full support for Destiny Diaper Bank's latest project to obtain personal care resources for seniors living throughout southwest Florida who cannot afford them due to limited income.

With 31% of our residents being over 60 and 17% of these seniors living below the poverty line—personal care represents one of many needs seniors experience due to complex and growing age-related issues.

As a local merchant, your collaboration will enable Destiny Diaper Bank (one of only 6 diaper banks in the nation) to address urgent personal care needs of low income seniors and thereby contribute to the community-wide effort to enhance the supportive living needs of seniors here in southwest Florida.

Thank you for your consideration of this request to collaborate with the Destiny Diaper Bank of southwest Florida.

Sincerely,

Crystal A. Hernandez, M.S.  
Director, Senior Connections Elderly Services Program  
Catholic Charities Diocese of Venice, Inc.



# Good Wheels

Transportation for the Disabled and Disadvantaged

10075 Bavaria Road, S. E. • Fort Myers, Florida 33913

May 22, 2009

**Gary Bryant**  
President/CEO

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**Steve Shimp**

Father Robert Tabbert- Pastor  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Fort Myers, Fl 33912

Re: US Department of HUD, Section 202 for the elderly

Dear Father Tabbert:

This is a letter of supporting Blessed Pope John XXIII Catholic Church request for funding a US Department of HUD, Section 202 for the elderly Application to build a 68 unit facility to house senior citizens over the age of 65.

Good Wheels is the duly authorized Community Transportation Coordinator for Lee, Hendry, and Glades Counties. As such, we are fully accredited to provide transportation to the disabled and disadvantaged citizens in our community.

Enclosed is a brochure and application that is required for Transportation Disadvantaged and/or Medicaid Transportation determination.

If you have further questions, please feel free to contact me at (239) 768-6184.

Sincerely,



Gary L. Bryant  
President/CEO

**INTENT TO PROVIDE  
SUPPORTIVE SERVICES**



Partner Agency





**LEE COUNTY**  
SOUTHWEST FLORIDA

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County Attorney

Diana M. Parker  
County Hearing  
Examiner

19 May 2009

Ed Sokel  
9330 White Hickory Lane  
Fort Myers FL 33912

Dear Mr. Sokel:

It was nice to hear from you today concerning your congregation's plans for a low income housing complex for seniors. When it's complete, please call the Senior Outreach program (533-4441) to get set up with services from the library. We can offer your residents several free services in addition to our libraries:

- o Senior Outreach handles deposit collections of large print materials that are loaned to facilities for up to two months.
- o Books-by-Mail serves persons who are unable to use our libraries due to temporary or long-term physical or medical disabilities – and their caregivers.
- o The Talking Books Library provides audio materials to persons who are unable to use standard print due to a visual or physical disability.
- o We also loan reminiscence-based programming kits and assistive devices to facilities and individuals.
- o Each library has a Senior Outreach Liaison who can assist an activity coordinator with programming materials.

Lee County has a strong network of services for older adults and you will want to learn about them all in the months to come. I suggest that you contact the Area Agency on Aging for SW Florida (332-4233) to start this process. Good luck with this much needed project.

Cordially,

Kathy Mayo, Outreach Services Manager, 533-4440

**INTENT TO PROVIDE  
SUPPORTIVE SERVICES**



**BLESSED POPE JOHN XXIII  
CATHOLIC CHURCH**

May 21, 2009

John Hazelroth  
JPH & Associates, Inc.  
P.O. Box 948006  
Maitland, Florida 32794

**INTENT TO PROVIDE  
SUPPORTIVE SERVICES**

Dear John,

Our parish at Blessed Pope John XXIII Catholic Church is looking forward to working with you as we move forward to apply for the US Department of HUD, Section 202 for the elderly.

We offer many services at our parish that will be available to your new residents. I wanted to list some of the many ministries we currently have at our parish that can apply to the senior residents who will be living in the HUD apartments.

- \* **Bereavement Group:** We have a wonderful group that meets weekly for anyone suffering a loss of a loved one or loss of any kind. This group is led by trained professionals.
- \* **Eucharistic Ministers:** Volunteers bring communion daily to Gulf Coast Hospital, weekly to nursing homes and can bring daily to residents that are Catholic.
- \* **Youth Group:** We have an active youth group and they do service projects in the community and can visit with seniors.
- \* **Scouts:** Our Boy and Girl Scout troops meet at our parish weekly and are actively involved in community outreach.
- \* **Thrift Store:** We own and operate our own Thrift Store and help those in need with furniture, household items and clothing. Our truck will pick up and deliver large items.

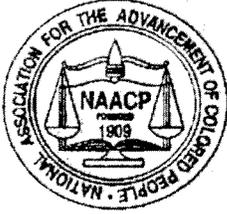
- \* **Social Justice Group:** We provide holiday meals for those in need and collect food for a food pantry, have a back pack drive, a shoe drive, a clothing drive and many other outreach programs.
  
- \* **Hispanic Mass:** We hold a Mass in Spanish the first Sunday of each month.

As you can see, we are quite supportive of this project and stand ready to assist your organization in a number of ways. We look forward to seeing this project on our property here at Blessed Pope John XXIII Catholic Church.

Sincerely,



Reverend Robert Tabbert



## SARASOTA COUNTY BRANCH, NAACP

P.O. Box 1024  
Sarasota, Florida 34230

Telephone (941) 355-2097  
Fax (941) 355-1987

September 4, 2009

Rev. Robert D. Tabbert  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Fort Myers, FL 33912

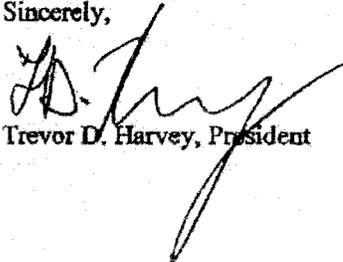
Re: Local Minority Community Support Services  
Project: Pope John XXIII Manor, HUD Section 202 Project, Lee County

Dear Rev. Tabbert,

It is the understanding of the Sarasota County Branch, NAACP that Blessed Pope John XXIII Catholic Church is seeking funding from the US Department of HUD to construct independent and affordable housing for seniors. Affordable housing for the elderly is badly needed in our community. The NAACP applauds and supports your efforts and hope you are successful in this venture.

If we can be of any further assistance to you, please do not hesitate to contact us.

Sincerely,



Trevor D. Harvey, President

**MINORITY  
ORGANIZATION**



**A F C A A M**  
The African Caribbean American Catholic Center  
Positive Values \* Empowering Programs



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10/1/2009

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Rev. Robert D. Tabbert  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Ft. Myers, FL 33912

Re: Local Minority Community Support Services  
Project: Pope John XXIII Manor, HUD Section 202 Project, Lee County

Dear Rev. Tabbert:

It is our understanding that Blessed Pope John XXIII Catholic Church is seeking funding from the US Department of HUD to construct independent and affordable housing for seniors. Affordable housing for the elderly is badly needed in our community. We applaud and support your efforts and hope you are successful in this venture.

Over the years, Blessed Pope John XXIII Catholic Church has sought to strengthen ties with the minority community by providing a host of programs and opportunities in an effort to reach out to ethnic minorities.

Good luck in your application and keep us posted as to your progress on this HUD funding application.

Sincerely,

Bill Iwanicki

William J. Iwanicki, M.Ed.  
Director  
AFCAAM Catholic Center  
3681 Michigan Ave.  
Fort Myers, FL 33916





## FILIPINO AMERICAN ASSOCIATION OF SOUTHWEST FLORIDA, INC.

**FAASWF**

*A Nonprofit 501(c)(3) Corporation*

1634 SE 47th Street Suite #2, Cape Coral, Florida 33910-8517 Tel# 239 772-5551  
Mailing Address: P. O. Box 100985, Cape Coral, Florida 33910

2008-2010

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September 10, 2009

Rev. Robert D. Tabbert  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Ft. Myers, FL 33912

Re: Local Resident Support- Minority Community  
Project: Pope John XXIII Manor, HUD Section 202 Project,  
Lee County

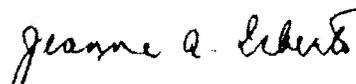
Dear Rev. Tabbert:

It is our understanding that Blessed Pope John XXIII Catholic Church is seeking funding from the US Department of HUD to construct independent and affordable housing for seniors. Affordable housing for the elderly is desperately needed in our community. We applaud and support your efforts and hope for your success in this venture.

Over the years, Blessed Pope John XXIII Catholic Church has sought to strengthen ties with the minority community by providing numerous programs and opportunities in an effort to reaching out to ethnic minorities.

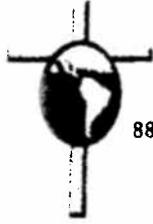
We wish you good luck in your application and kindly keep us posted with the progress on your HUD funding application.

Sincerely,

  
Jeanne A. Isberto  
President

**MINORITY  
ORGANIZATION**

*Together We Unite To Serve The Filipino-American Community*



**Jesus the Worker & San Jose Catholic Missions**

881 Nuna Ave., Fort Myers, FL 33905 • P.O. Box 50909, Fort Myers, FL 33994  
Phone: (239) 693-5333 • Fax (239) 693-5626  
Email: jesustheworker@yahoo.com

May 20, 2009

**Rev. Robert D. Tabbert**  
**Blessed Pope John XXIII Catholic Church**  
**13060 Palomino Lane**  
**Ft. Myers, FL 33912**

**Re: Local Minority Community Support Services**  
**Project: Pope John XXIII Manor, HUD Section 202 Project, Lee County**

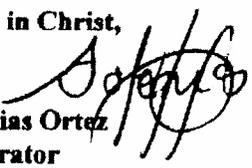
Dear Rev. Tabbert:

It is our understanding that Blessed Pope John XXIII Catholic Church is seeking funding from the US Department of HUD to construct independent and affordable housing for seniors. Affordable housing for the elderly is badly needed in our community. We applaud and support your efforts and hope you are successful in this venture.

Over the years, Blessed Pope John XXIII Catholic Church has sought to strengthen ties with the minority community by providing a host of programs and opportunities in an effort to reach out to ethnic minorities.

Good luck in your application and keep us posted as to your progress on this HUD funding application.

Sincerely in Christ,

  
**Fr. Sofonias Ortiz**  
**Administrator**

**MINORITY  
ORGANIZATION**

9-1-09

To Whom It May Concern,

My name is [REDACTED] have been a resident at Villa Vincente since February 2009.

I am writing this letter in support of HUD Housing for those 62 and older on a limited income; I am very happy with my decision to live in such a community. I feel quite at home with my neighbors as a bilingual person from Puerto Rico. I live among a group of friendly people who are open to meeting new people with diverse backgrounds. I would be happy to suggest that my friends or family move into this type of housing.

I feel the more housing of this type made available to communities where there is a need

The better.

Thank you,

[REDACTED]

**MINORITY RESIDENT**

September 3, 2009

Kathy Bergloff, CPM  
Managing Director

I have been asked to write a letter expressing my satisfaction as resident of "Villa Vincente" in Fort Myers.

The Villa is housed in a beautiful building, providing the residents with modern facilities for all of us to enjoy. I am perfectly happy with the arrangements, and also treated well.



MINORITY RESIDENT

Sept. 18, 2009

To Whom It May Concern,

My name is [REDACTED] have been a resident at Villa Vincente since February 2009.

I am writing this letter in support of HUD Housing for those 62 and older on a limited Income; I am very happy with my decision to live in such a community. I feel quite at home with my neighbors as a bilingual person from Puerto Rico. I live among a group of friendly people who are open to meeting new people with diverse backgrounds. I would be happy to suggest that my friends or family move into this type of housing.

I feel the more housing of this type made available to communities where there is a need

The better.

Thank you,

[REDACTED]

MINORITY RESIDENT

May 18,2009

Father Robert Tabbert, Pastor  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Fort Myers, Florida 33912

Dear Father Bob,

In support of the HUD 202 project, I have developed an overview of the immediate area as it applies to the Senior Citizen project. This list contains the types of businesses that are in the area that can provide employment opportunities and services to the tenants.

Within 1/4 mile of the proposed site, we have; a restaurant, a nail shop, bakery, fitness center, hotel, dry cleaners, hearing aid office, and numerous offices of various businesses.

In addition to the above, within 1/2 mile we have: 3 fast food businesses, 3 gasoline stations with mini-markets, restaurant, office building, and 5 hotels.

Additionally, we have within 3/4 to 1 mile; 4 fast food establishments, drug store, offices, bank, large chain grocery store, liquor store, hair and nail salon, a movie rental store and a restaurant.

This general area has our Church, the Riverside Church, the Church Of The Cross, and the Unitarian Universalist Church.

The newly up-graded Gulf Coast Hospital is 3 miles away and Southtrail Fire Department is 1 miles away. Lee County Medical ambulances and the Sheriffs office are always in the immediate area.

The conclusion of this survey is that the area is well suited to support the Senior Citizen project.

Sincerely,

A large, solid black rectangular redaction covers the signature area of the letter.



Father Robert Tabbert  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Fort Myers, FL 33912

Dear Pastor Tabbert

Greetings from Riverside Church!

It has come to our attention that your congregation is planning on building a 68 unit facility for providing affordable living for citizens of our area.

As neighbors, we affirm our support of your intentions and feel strongly that such a facility would be a positive addition to our community and serve a significant purpose in providing affordable living space for those presently needing affordable housing.

Our prayers are with you and your congregation as you pursue this endeavor. If we can be of further assistance to you, feel free to let me know.

For the Pastors, Elders and congregation of Riverside Church

A handwritten signature in black ink, appearing to read "Charles Lake". The signature is fluid and cursive, with the first and last names being the most prominent.

Dr. Charles Lake, Interim Pastor  
Riverside Church

# Unitarian Universalist Church

of Fort Myers Where Religion and Reason Meet

---

May 20<sup>th</sup>, 2009

Rev. Robert D. Tabbert  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Fort Myers, FL 33912

Dear Father Tabbert,

The Unitarian Universalist Church of Fort Myers wishes to express its heartfelt support for your proposed housing project to benefit low-income senior citizens in our community. This is an inspiring example of ministry to those in need, and will provide a service in great demand in our area.

Sincerely,



Aric DiPiero, Vice President Operations

On behalf of the Board of Trustees of UUCFM

---

Member UUA since 1961  
13411 Shire Lane, Fort Myers, FL 33912-1824  
TEL: 239.561.2700 FAX: 239.561.1172 E-MAIL: [uuchurch@uucfm.org](mailto:uuchurch@uucfm.org)  
Visit our Website: [www.uucfm.org](http://www.uucfm.org)



**Catholic Charities  
Diocese of Venice, Inc  
District II  
Serving Lee County**

**DISTRICT II  
ADMINISTRATION**  
4235 Michigan Link Ave.  
Fort Myers, FL 33916  
239.334.4007 Phone  
239.334.3707 Fax

**The Elizabeth Kay  
Galeana Center**  
4235 Michigan Link Ave.  
Fort Myers, FL 33916  
239-337-4193 Phone  
239-332-2799 Fax

**Catholic Charities  
Community Services**  
*[Haitian, Immigration and  
Elderly Services]*  
5597 Sunrise Drive  
Fort Myers, FL 33919  
239-334-2234 Phone  
239-334-2707 Fax

**Bonita Springs Social  
Service Center**  
27050 Old 41 Road  
Bonita Springs FL 34135  
239-390-2928 Phone  
239-948-0647 Fax

**Human Trafficking and  
Refugee Resettlement  
Services**  
3430 Cleveland Ave.  
Fort Myers, FL 33901  
239-322-1077 Phone  
239-322-1280 Fax

May 26, 2009

John Hazelroth  
JPN & Associates, INC.

Dear Mr. Hazelroth,

Senior Connections, a supportive living program for the elderly, of Catholic Charities Diocese of Venice, Inc., expresses its full support for funding the senior housing project of the Blessed Pope John XXIII church.

According to recent trends for the state of Florida we have the largest number of residents age 65 and older and can expect to see that increase exponentially by the year 2020 to more than 4.6 million. With 31% of our residents being over 60 and 17% of these seniors living below the poverty line—affordable housing is an essential need. These demographic and economic trends offer only a glimpse into the complex and growing issue of age-related transitions and hardships characteristic of too many senior residents in our community.

Funding the senior housing project of Blessed Pope John XXIII will effectively expand the availability of affordable housing for seniors and contribute to the community-wide effort to provide a continuum of services that enhance the supportive living needs of seniors here in southwest Florida.

Thank you for your consideration of this request to fully fund the senior housing project of the Blessed Pope John XXIII church.

Sincerely,

Crystal A. Hernandez, M.S.  
Director, Senior Connections Elderly Services Program  
Catholic Charities Diocese of Venice, Inc.





V/POL  
file  
HUD.

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DIRECTOR AT LARGE
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IMMEDIATE PAST PRESIDENT

June 23, 2009

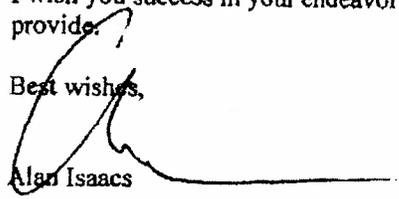
Father Robert Tabbert, Pastor  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Fort Myers, FL 33912

Dear Pastor Tabbert,

I am delighted to hear that you and your congregation are planning to construct a complex of low income housing in Lee County. Particularly in these times we should all be thinking how better to serve those who struggle most.

I wish you success in your endeavor and offer any further assistance I can provide.

Best wishes,

  
Alan Isaacs

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- Jaime Weisinger  
YOUNG LEADERSHIP
- BRIAN SIMON  
L'CHAYIM

EXECUTIVE DIRECTOR

Alan Isaacs



**Florida House of Representatives**  
**Representative Nick Thompson**  
District 73

**District Office:**  
2120 Main Street, Suite 208  
Fort Myers, FL 33901  
239-533-2411

**Tallahassee Office:**  
417 House Office Building  
402 South Monroe Street  
Tallahassee, FL 32399-1300  
(850) 488-1541

Nick.Thompson@myfloridahouse.gov

May 7, 2009

The Reverend Robert D. Talbert  
Blessed Pope John XXIII Catholic Church  
13060 Palomino Lane  
Fort Myers, FL 33912

Dear Father Talbert:

It is my privilege to write a letter of support for the Housing and Urban Development (HUD) to build a senior citizen apartment complex on the Church grounds in Fort Myers, Florida.

There is tremendous need in southwest Florida for seniors who are on a fixed income who would meet the HUD requirements. This complex would be a welcome ministry to senior citizens of all faiths and the proximity and access to services that seniors require is a major factor in support of this well thought out project.

If I can be of further service in assisting you with this worthy project, please do not hesitate to contact my office.

Sincerely,

A handwritten signature in black ink, appearing to be "Nick Thompson", written over a horizontal line.

Nick Thompson

## **RE-SUBMISSION OF PREVIOUSLY SUBMITTED INFORMATION**

Per the HUD notice of funding under the Application Submission Requirements, it states that "... you will be able to submit information and exhibits you have previously prepared for prior applications under Section 202, Section, or other funding programs. Examples of exhibits that may be readily adapted or amended to decrease the burden of application preparation include, among others, those on previous participation in the Section 202 or Section 811 Programs, your experience in provision of housing and services, supportive service plan, community ties, and experience serving minorities.

In this section, we are including updated support letters, along with support letters previously submitted.

# AFCAM

The African Caribbean American Catholic Center  
Catholic Diocese of Venice in Florida  
Education | Character | Self-Help



June 5, 2008

Re: Local Support – Minority Community  
Sponsor: Diocese of Venice and Holy Cross  
Catholic Church Project: HUD Section 202  
Project, Palmetto, FL

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Gregg Dwyer

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**Executive Director:**

Ismael Hernandez

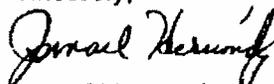
Dear Rev. Useche:

We want to express our full support for the Diocese of Venice in Florida in seeking funding from the US Department of HUD to construct independent and affordable housing for seniors. Affordable housing for the elderly is badly needed in our community. The endeavor is a worthwhile one and we hope it is successful.

Over the years, both the Diocese of Venice and Holy Cross Catholic Church has sought to strengthen ties with the minority community by encouraging and supporting an ethnically diverse parish and providing a host of programs and opportunities in an effort to reach out to ethnic minorities.

Please know of my availability for further inquiry.

Sincerely,

  
Ismael Hernandez  
Executive Director

**MINORITY  
ORGANIZATION**



P.O. Box 50044 • Fort Myers, Florida 33994  
Phone: 239/461-0233 • Fax: 239/461-0238  
[www.afcam.com](http://www.afcam.com)

*The greatest good you can do for another is not just to share your riches but to reveal to him his own.*  
— Benjamin Disraeli

*Sr. Elisa Perez, M.H.M.L.*  
*Sr. Wilma Tun Cauich, M.H.M.L.*  
*3313 6<sup>th</sup> Avenue West*  
*Palmetto, Florida 34221-5425*

April 10, 2008

Mr. Jim Branson  
Director of Multifamily Housing Division  
United States Department of HUD  
400 West Bay Street, Suite 1015  
Jacksonville, FL 32202-5121

RE: Holy Cross Manor II

Dear Mr. Branson,

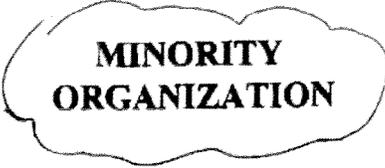
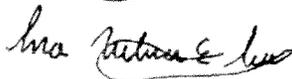
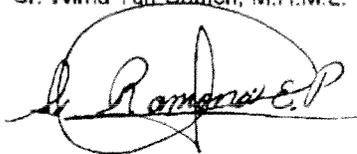
We are members of a Religious community working in Holy Cross Religious Education and Youth Ministries in Palmetto, Florida. We work with a group of adolescents and youth of the Latino community, many whose grandparents are living with their children in cramped and crowded conditions because they are unable to find affordable housing. As our work often takes us into the poorest communities, we see how greatly more such low income housing could help the Palmetto area.

A new HUD housing facility would make it possible for a few minority elderly to live their remaining years in a safe, clean, home with economic and emotional support the HUD low-income housing would provide. There will be no difficulty in meeting a 100 percent occupancy for any HUD funded projects that can be made available for them.

We support your efforts to create a better environment for the poor and hope you are successful in building a new facility. In addition we are extremely appreciative for what you have already done for those in need in this area.

God bless you,

Sr. Elisa Perez, M.H.M.L.  
Sr. Wima Tun Cauich, M.H.M.L.



**MINORITY  
ORGANIZATION**



April 10, 2008

Mr. Jim Branson  
Director of Multifamily Housing Division  
United States Department of HUD  
400 West Bay Street, Suite 1015  
Jacksonville, FL 32202-5121

RE: Holy Cross Manor II

Dear Mr. Branson,

We have a great need for low income housing in the Latino Community, here at Holy Cross Catholic Church in Palmetto, Florida. The Church is not only a spiritual and emotional support to our community, but also a place where we can gather together. With costs rising and jobs being scarce, Holy Cross is a focal point for many lives. We truly need the economic and emotional support with which this low-income housing would provide.

Thank you for your time and consideration. As a parishioners of Holy Cross Church, I am hopeful the funding for the building of a new facility will transpire and I pray for your success.

Sincerely,



**MINORITY RESIDENT**

April 16, 2007

  
Palmetto, FL 34221

Mr. Jim Branson  
Director of Multifamily Housing Division  
United States Department of HUD  
400 West Bay Street, Suite 1015  
Jacksonville, FL 32202-5121

RE: Holy Cross Manor II

Dear Mr. Branson,

I am writing in support of the subsidized housing project being planned by the Holy Cross Catholic Church and the Diocese of Venice in Florida for aging Senior Citizens.

I would like to bring to your attention the great need for the proposed multi-unit program and services needed in our area. This area has a large population of elderly persons with very limited and fixed incomes. In order for these persons to continue to live independently, they must have housing that they can afford and the services this project will provide.

Many of our friends in this area are faced with the increasing rents and maintenance fees of mobile home living, however their retirement and social security have increased little. They are simply finding it more difficult to afford the necessities of daily life.

Please support our great need for housing and services by awarding the HUD Funding to the Diocese of Venice in Florida for the Holy Cross Church subsidized housing project.

Best Regards,  
  


**MINORITY RESIDENT**

MINORITY RESIDENT

April 7, 2008

Dear Margaret,

I'm writing about my appreciation for Holy Cross Manor and what it's meant for me.

In May of 2005 I was forced into retirement because of Major illness. I returned to Florida and lived in non subsidized housing. Very soon my pension and savings were depleted and I had serious concerns about future housing. Thumbing through the Shopping Guide I came across an ad about Holy Cross Manor and the rest is history.

I've now lived at the Manor since August of 2005. From the beginning management and staff have been outstanding. All those responsible for the existence of Holy Cross Manor have made it not just a place to live but a home!

Holy Cross Manor has been a God send for me and I'm sure there are many other seniors out there looking, hoping, praying for what Holy Cross Manor has to offer.

In Sincere Appreciation

December 2007

Margaret,

Thanks for all you  
do for so many,  
especially me -

Margaret,

God bless you  
each day of the new year  
and keep you  
in his loving care.



MINORITY RESIDENT

Dear Margaret,  
I wanted to  
at this time let you  
know how much  
I love living here  
at Holy Cross Manor  
when I moved here  
it seemed too good to  
be true, but continues  
to bring me joy every  
day and you have  
always been so pleasant  
we must thank God  
daily for this opportunity  
sincerely

MINORITY RESIDENT

To whom it may concern  
I for one feel that Trinity House  
is the place to reside,  
in my case it was left alone to  
carry over, I am content & happy  
here, all because of the excellent  
management we have here.

Always make sure the residence  
are treated fair and this House  
is well kept  
I am very pleased that they are here  
May God bless them both

MINORITY TENANT LETTER

[REDACTED]

*To: Housing Administration*

*Just a brief note to express my satisfaction with my living conditions here at the Trinity House.  
Upon my arrival here I had no idea what to expect, thus far it has been a pleasurable experience.  
The tenants, maintenance, and the management of the building (Nancy Ruple) has been good and  
I just wanted to express my appreciation.*

*Sincerely,*  
[REDACTED]

MINORITY TENANT LETTER

I am writing in support of the application for a HUD-202 Housing Project that the Diocese of Venice is submitting for our parish at Holy Cross in Palmetto, Florida.

There is a very serious need for subsidized housing for elderly persons in our community, especially the minorities who can not make it financially with the rent payments, medication and have enough left for food. We do not have housing in this area that would meet the needs of the low and very-low income elderly.

This HUD facility would make it possible to provide affordable rents in a safe, clean, peaceful environment that would offer the elderly citizens quality of life to share with their peers. This community needs this facility desperately and without your help, it will never happen.

Sincerely,

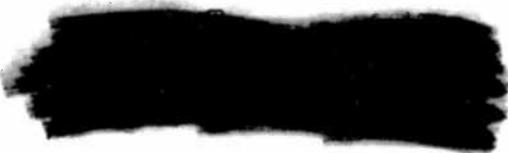
A large, solid black rectangular redaction covering the signature of the sender.

Minority Letter

We have a great need for low income housing in the Hispanic Community here at Holy Cross Catholic Church in Palmetto, Florida. The Church is not only a spiritual and emotional support to our community, but also a place where we can gather together. With costs rising and jobs being scarce, Holy Cross is a focal point for many lives. We truly need the economic and emotional support with which this low-income housing would provide us.

Please support the HUD 202 Funding to the Diocese of Venice and help our Hispanic community here at Holy Cross.

Very truly yours,



Minority Letter

April 12, 2008  
Pastor  
Holy Cross Church  
506 26<sup>th</sup> Street  
Palmetto, FL 34221

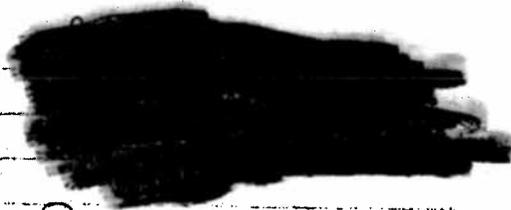
Re: Local Support-Minority Community  
Sponsor: Diocese of Venice and Holy Cross Catholic Church  
Project: HUD Section 202 Project, Palmetto, FL

Dear Rev. Useche:

We, as board members of Project Light of Manatee, Inc., feel there is a great need for independent and affordable housing for the elderly in our community. We support the program of building the facility at Holy Cross and hope that you are successful in getting the project completed.

Sincerely,





Palmetto, Fl. 34221

Southeastern Property  
Management Inc.  
1103 Richard Arrington  
Birmingham, Al 35205

To Whom it may concern;

I am writing this letter to tell you  
I enjoy my apartment very much.  
My nice new appliances and I do  
appreciate, so much, a very nice,  
affordable, place to live.

I respect and admire, our office  
manager, Margaret Hackett. Even though  
she is very busy she always makes  
time when we need her help.

I only wish we had more  
than one (1) entrance and we  
do need more parking.

All in all I am very grateful.

P.S.  
The grounds are  
maintained well also.

Thank you!  
Sincerely,



Dear Margaret: April 7, 2006

Just a short note to say. The five only lived here a couple of months. Five found it very pleasant. The building, apts., and grounds are lovely - I would like, for those tenants without transportation, to have some daily bus service, and more actual activities in the building, and keep hoping - that is

yet to come -

Other than those mild suggestions, I still say - I'm going to be very pleased with my time spent at Holy Cross Manor.

34221



Dear Mrs. Margaret  
Thank you and the lovely  
ladies for the great dinner  
on Thanksgiving it really  
made my day.

Sincerely



April 10, 2008

  
Palmetto, FL 324221-9368

Mr. Jim Branson  
Director of Multifamily Housing Division  
United States Department of HUD  
400 West Bay Street, Suite 1015  
Jacksonville, FL 32202-5121

RE: Holy Cross Manor II

Dear Mr. Branson,

We are writing in support of the application for HUD housing project that the Diocese of Venice is submitting for our parish at Holy Cross in Palmetto, Florida.

We feel there is an immediate need for more subsidized housing for elderly persons in our community, especially those who can not make it financially with the rent payments, medication and have enough left for food. We do not have sufficient housing in this area that would meet the needs of the low and very low income elderly.

An additional HUD Housing at the location of Holy Cross Manor would make it possible to provide affordable rents in a safe, clean, peaceful environment that would offer the elderly citizens quality of life to share with their peers. This community needs this facility desperately and without your help, it will never happen.

We thank you for your consideration.

Sincerely,  




April 15, 2008

Mr. Jim Branson  
Director of Multifamily Housing Division  
United States Department of HUD  
400 West Bay Street, Suite 1015  
Jacksonville, FL 32202-5121

Dear Mr. Branson:

I am writing in support of the application for the HUD Housing Project that the Diocese of Venice is submitting for our parish at Holy Cross in Palmetto, Florida

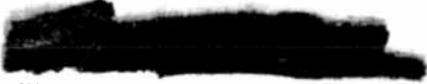
There is a very serious need for low income housing for the elderly citizens of Palmetto. At a time when people should be enjoying their golden years in a worry free environment, we find many are making choices between food and medicine, let alone rent payments. There is simply not enough low income housing in the Palmetto area to meet the needs of all our elderly citizens. We have a large Latino community, many of whom live at, or below, poverty level. All of these elderly people need and deserve a safe, low rent home in which to live.

We are truly grateful to have one HUD housing facility located nearby. However, we still have a great need for additional housing. I feel sure we would have no trouble filling a second facility. Please do what you can to make a second facility possible. Without your help, it will not happen.

Sincerely yours,



April 15, 2008

  
Ellenton, FL 34222

Mr. Jim Branson  
Director of Multifamily Housing Division  
United States Department of HUD  
400 West Bay Street, Suite 1015  
Jacksonville, FL 32202-5121

RE: Holy Cross Manor II

Dear Mr. Branson,

I am writing to you to let you know there is serious need for more subsidized housing for elderly persons in our community. We do not have enough housing that would meet the needs of the Senior Citizen population, who for the greater part are on limited fixed incomes. It will not be long before I, myself, will need affordable housing, a means of transportation, perhaps social service, and most importantly, home health care.

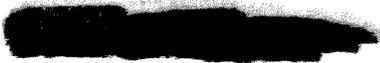
My Parish, Holy Cross Catholic Church, wants to make this possible for the elderly in our area. I am requesting that you support our Diocese, The Diocese of Venice in Florida, by granting the HUD FUNDING to the Holy Cross Catholic Church Project. Our community needs this facility and without your help, it is not possible.

Thanks you for your time and consideration.

Sincerely,



April 10, 2008

  
Palmetto, FL 34221

Mr. Jim Branson  
Director of Multifamily Housing Division  
United States Department of HUD  
400 West Bay Street, Suite 1015  
Jacksonville, FL 32202-5121

RE: Holy Cross Manor II

Dear Mr. Branson,

We are writing in support of the application for the HUD Housing Project that the Diocese of Venice is submitting for our parish at Holy Cross in Palmetto, Florida.

There is a very serious need for more subsidized housing for elderly persons in our community, especially the minorities who can not make it financially with the rent payments, medication and have enough left for food. We do not have enough housing in this area that would meet the needs of the low and very low income elderly.

The HUD Housing II facility would make it possible to provide affordable rents in a safe, clean, peaceful environment that would offer the elderly citizens quality of life to share with their peers. This community needs this facility desperately and without your help, it will never happen.

Sincerely,



# Holy Cross Catholic Church

506 26th Street West • Palmetto, Florida 34221-5425 • (941) 729-3891 FAX - 721-9402

March 13, 2008

Mr. Jim Branson  
Director of Multifamily Housing Division  
United States Department of HUD  
400 West Bay Street, Suite 1015  
Jacksonville, FL 32202-5121

RE: Holy Cross Manor II

Dear Mr. Branson:

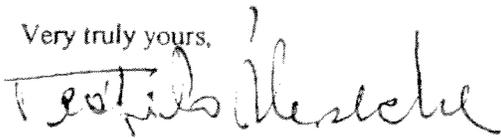
As the Pastor of Holy Cross Catholic Church in Palmetto, within Manatee County, Florida, I am a priest accountable for a multi cultural community, which makes up our parish. Having been assigned here for the approximately six years, I have experience with the diverse people who call Palmetto home.

Holy Cross Church has a wide spectrum of communities represented in our registration. There are many people of whom live at, or below, poverty level. There is a large number of elderly residents living very near the church, many of whom are in that situation. Quite often, decisions between rent, medication and food must be made according to their limited economic circumstances.

*This community would greatly benefit the building of more affordable housing. There will be no difficulty in meeting a 100 percent occupancy for any HUD funded projects that can be made available for them. Our parish community would eagerly support this project and would welcome the opportunity to refer qualified perspective tenants.*

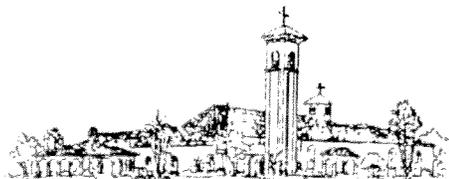
We are extremely appreciative for what you have already done for those in need here in Palmetto, however, in our area those with low incomes are always present. Thank you for your consideration, please feel free to contact me at Holy Cross Church at (941) 729-3891, if you have any questions or concerns.

Very truly yours,



Rev. Teofilo Useche,  
Pastor

**INTENT TO PROVIDE  
SUPPORTIVE SERVICES**





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Fax: 941.351.9875  
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Keith@scil4u.org

April 21, 2008

Mr. Jim Branson  
Director of Multi-Family Housing Division  
U.S. Department of HUD  
301 W. Bay Street, Ste. 2200  
Jacksonville, FL 32202

Re: Diocese of Venice Support Letter

Dear Mr. Branson:

We were informed that the Diocese of Venice is seeking funding from the U.S. Department of HUD to construct accessible and affordable housing for seniors in Manatee County. We wholeheartedly support the Diocese's efforts and respectfully urge you to provide them with the requested funds.

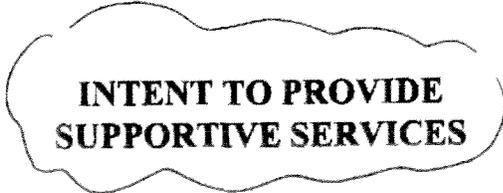
Our organization provides independent living services to seniors with disabilities in this county. Shortage of accessible and affordable housing is the most pressing obstacle to independent living for many of the seniors with disabilities in this county and others.

We look forward to having additional housing units available and hope to cooperate with the Diocese of Venice in filling the units they build.

Please feel free to contact me directly at the address and phone herein.

Sincerely,

Keith Kitchens  
Executive Director



Tax ID#68-00-058141-85C

A non-profit, non-residential community agency that facilitates independence, productivity, and a better quality of life for persons with disabilities



*Community Services Department*

# MANATEE COUNTY

April 22, 2008

Mr. Jim Branson  
Director of Multi-Family Housing Division  
US Department of HUD  
301 W. Bay Street, Suite 2200  
Jacksonville, FL 32202

Re: Local Support Letter  
Sponsor: Diocese of Venice  
Project: HUD Section 202 Project, Manatee County FL

Dear Mr. Branson:

It is our understanding that the Diocese of Venice is seeking funding from the US Department of HUD to construct independent/affordable housing for seniors in Manatee County. We applaud these efforts and hope for this organizations success.

It is also understood that HUD asks sponsors to obtain letters of support. I am pleased to provide this letter of support. In addition, we provide/coordinate the following supportive services to elderly residents in Manatee County:

- Case Management
- In-home services in order for elders to age in place
- In-home counseling
- Prescription payment service
- Caregiver respite
- Adult Daycare
- Elder Helpline for information and referral

There new residents would have the ability to access these services/programs offered by Manatee County's Aging Services Section.

Sincerely,

Tracie A. Adams  
Human Services Coordinator  
Manatee County Government Community Services Dept.  
Aging Services Section

**INTENT TO PROVIDE  
SUPPORTIVE SERVICES**



APR-15-2008 11:52

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April 14, 2008

Mr. Jim Branson  
Director of Multi-Family Housing Division  
US Department of Housing and Urban Development  
301 W. Bay Street, #2200  
Jacksonville, FL 32202

RE: Local Support Letter  
Sponsor: Diocese of Venice  
Project: HUD Section 202 Project, Manatee County, FL

Dear Mr. Branson:

It is our understanding that the Diocese of Venice is seeking funding from the US Department of Housing and Urban Development to construct independent/affordable housing for seniors in Manatee County. We applaud these efforts and wish them success in this application.

Our organization is pleased to provide this letter of support. In addition, we provide educational seminars for elders at risk of mismanaging their medications, which we would be pleased to make available at no charge, if this funding is received.

Sincerely,

*Michael A. Bernstein*  
Michael A. Bernstein  
President/CEO

**INTENT TO PROVIDE SUPPORTIVE SERVICES**



### FUNDING ALSO RECEIVED FROM:

- AGENCY FOR HEALTH CARE ADMINISTRATION
- AGENCY FOR PERSONS WITH DISABILITIES
- ALLIANCE FOR HUMAN SERVICES
- CITY OF CLEARWATER, LARGO, ST. PETERSBURG & TAMPA SPINNAK
- CHILDREN'S BOARD OF HILLSBOROUGH COUNTY
- COALITION FOR NEIGHBORS OF PASCO COUNTY
- CONFERENCE IN MATERIALS
- CLUBS AGAINST GERMAN
- DEPARTMENT OF CORRECTIONS
- FLORIDA ATTORNEY GENERAL'S OFFICE
- EMERGENCY FOOD AND SHELTER PROGRAM
- GILBERT FOUNDATION
- JEWISH FEDERATION OF PINELLAS COUNTY
- LEE COUNTY
- OFFICE OF PREVENTION FUND
- PALM BEACH COUNTY
- PINELLAS COUNTY
- ROTHMAN FAMILY FOUNDATION



**DOING  
THE MOST  
GOOD**

William Booth, Founder  
Shaw Clifton, General  
Maxwell Feener, Territorial Commander  
Major Steve Hedgren, Divisional Commander  
Majors Tony & Suzanne Barrington, Area Coordinators

April 11, 2008

Mr. Jim Branson  
Director of Multi-Family Housing Division  
US Department of HUD  
301 W. Bay Street, Suite 2200  
Jacksonville, Florida 32202

RE: Local Support Letter  
Sponsor: Diocese of Venice  
Project: HUD Section 2002 Project, Manatee County, FL

Dear Mr. Branson:

It is our understanding that the Diocese of Venice is seeking funding from the US Department of HUD to construct independent affordable housing for seniors in Hillsborough County. We applaud these efforts and hope for this organization's success.

Our organization is pleased to provide this letter of support. In addition, we provide/coordinate the following supportive services to elderly residents:

- Temporary Emergency Shelter
- Community Dinner Served Daily
- Resource & Referral Services

Those new residents would have access to those services/programs offered by our organization. Good luck with your funding application and please keep us posted as to your progress.

Kind regards. God bless you.

Sincerely

Major Tony Barrington  
Area Coordinator

**INTENT TO PROVIDE  
SUPPORTIVE SERVICES**



## 3(e) Housing Experience

## **EXHIBIT 3(e)**

### **Housing and Support Experience**

The Diocese of Venice has extensive experience in developing and operating housing for the elderly. The following paragraphs briefly describe this experience.

#### **HUD HOUSING EXPERIENCE OF THE DIOCESE**

The Diocese of Venice has in operation four Section 202 supportive housing facilities for the elderly, and one under construction. The following is a description of each of the four projects:

- Villa San Carlos is a 50-unit Section 202 housing facility for the elderly located in Port Charlotte, Florida. The Diocese was awarded a Section 202 fund reservation September 30, 1984. The facility went into occupancy October, 1986. The facility is 100 percent occupied with an extensive waiting list. During the twelve years of operation of the facility, there have been no unresolved rental delinquencies. The retained managing agent is SPM, LLC.
- Villa San Carlos II Apartments is a 54-unit Section 202 housing facility for the elderly located in Port Charlotte, Florida. The Diocese was awarded a Section 202 fund reservation February, 1992. The facility went into occupancy July 1995. Villa San Carlos II is 100 percent occupied with a waiting list. There have been no unresolved rental delinquencies. The managing agent is SPM, LLC.
- Casa Santa Marta Is a 78-unit Section 202 housing facility for the elderly located in Sarasota, Florida. The Diocese was awarded a Section 202 fund reservation September, 1980. The facility went into occupancy July, 1982. Casa Santa Marta is 100 percent occupied with an extensive waiting list. The managing agent is SPM, LLC.
- Casa Santa Marta II Apartments is a 52-unit Section 202 housing facility for the elderly located in Sarasota, Florida. The Diocese was awarded a Section 202 fund reservation February, 1992. The facility went into occupancy June, 1995. Casa Santa Marta II is 100 percent occupied with an extensive waiting list. There have been no unresolved rental delinquencies. The managing agent is SPM, LLC.
- Villa San Marcos is a 81-unit Section 202 housing facility for the elderly located in Venice, Florida. The facility went into occupancy in 2002. It is 100 percent occupied with an extensive waiting list. The managing agent is SPM, LLC.
- Villa Vicente is a 68-unit project funded in FY 2001 and will be located in Ft. Myers. The

Sponsor is now preparing the firm commitment application for submittal to the HUD Jacksonville office.

- Holy Cross Manor is a 68-unit project funded in 2003. It is located adjacent to Holy Cross Catholic Church and is 100% occupied. It should be noted that the parish spent over \$200,000 of its own resources to extend utilities for this project.
- Holy Cross Manor II will be another 68-unit project adjacent to Holy Cross Manor. This project was funded in 2008/2009 and construction is projected to commence at the end of 2009.

The success of these projects can be measured by the testimony of their residents. Attached are letters from residents of Casa Santa Marta I and II, Villa San Carlos, and Holy Cross Manor, who comment on the familial atmosphere, the quality of the personnel, and the easy access to neighborhood amenities that the Diocesan housing affords them.

In addition to elderly housing, the Diocese oversees two other housing projects: Clare House in Fort Myers, which provides residence for six single parent families; and Our Mother's House in Venice, which also provides residence for six mothers and their infants. The homes were converted by Catholic Charities from other uses without any assistance from any other State or Federal agency. Both homes are administered by the District Administrators, who possess Master degrees in Social Work.

In Palmetto (Manatee County), the Diocese is providing a HUD-approved home ownership counseling program for low and moderate Income households. This program, which is free of charge, is particularly geared to Hispanic/Latino families who seek to purchase their own homes.

## PAST SPONSOR PERFORMANCE

The Sponsor has been an active participant in the HUD Section 202 program. The Sponsor has worked diligently to meet HUD mandated submission schedules, as well as project budgets. **Since 2004, no Sponsor projects have required amendment funds.** Of the eight projects (see table on previous page), including those funded prior to 2004, only Holy Cross Manor needed amendment funds. These funds were needed due to the following; i) site conditions increased the cost of site development, primarily due to the need to extend both water and sewer and to utilize a lift station to access a sewer force main; ii) the project was developed during an over-heated real estate and construction market, partly due to several hurricanes driving the cost of construction up over a very short time period; and iii) due to the absence of utilities on the county land, the Sponsor had to annex the site into the City. This process was both time consuming and expensive, but ultimately successful. **None of the eight projects were extended beyond the HUD prescribed period of 24 months for initial closing or 36 months for fund reservation.**

**Table 1. Sponsor Performance, 1986 - Present, Diocese of Venice**

Project Name/Address	Project No.	Fund Reservation Date (FY)	Construction Start Date (FY)	Status	Fund Reservation			REAC Score		Mgmt Review			
					Beyond 24 Mo	Beyond 36 Mo	Beyond 48 Mo	Amendment Funds Needed	Owner Equity	Date	Score	Date	Score
Villa San Carlos 2550 Easy Street Port Charlotte, FL 33952	066-EH183	1982	1985	Completed	No	No	No	No	N/A	8/1/06	99a	8/15/07	Satis.
Villa San Carlos II 22250 Vick Street Port Charlotte, FL 33980	066-EE002	1991	1994	Completed	No	No	No	No	N/A	8/1/06	99a	6/20/06	Satis.
Casa Santa Marta 1576 8 <sup>th</sup> Street Sarasota, FL 34236	067-EH113	1978	1981	Completed	No	No	No	No	N/A	7/18/06	94b	5/19/07	Satis.
Casa Santa Marta II 800 N. Lemon Avenue Sarasota, FL 34236	067-EH003	1991	1994	Completed	No	No	No	No	N/A	8/17/06	100a	5/10/07	Satis.
Villa San Marcos 13031 Palm Beach Blvd Ft. Myers, FL 33905	067-EE099	1999	2001	Completed	No	No	No	No	N/A	8/31/06	99b	N/A	N/A PRAC
Villa Vincente 13031 Palm Beach Blvd Ft. Myers, FL 33905	067-EE083	2001	2003	Completed	No	No	No	No	N/A	8/30/06	99b	N/A	N/A PRAC
Holy Cross Manor 504 26 <sup>th</sup> Street Palmetto, FL 34221	067-EE126	2003	2005	Completed	No	No	No	\$904,300	\$200,000 (a)	N/A	—	N/A	N/A PRAC
Holy Cross Manor II 504 26 <sup>th</sup> Street Palmetto, FL 34221	067-EE154	2009	2009(b)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	—	N/A	N/A

N/A - Projected funding prior to FY2003 are not evaluated in terms of amendment funds.  
 FC/NS - Firm Commitment not submitted.

(a) For the extension of sewer and to annex site into the City of Palmetto to allow for construction.  
 (b) Projected

## SUPPORTIVE SERVICES

The Diocese has long realized that the provision of housing is but one element to a senior's existence. By providing a host of support services, the independence of each and every resident is increased and overall health improved. The following is a list of some of the supportive services provided at Diocesan sponsored projects;

- Food Bank – distribution of food to needy residents
- SHARE Volunteer Food Purchase program – Food for needy residents
- Medicare/Medicaid Benefit Counseling
- Monthly Health Screening for Eyes, Ears, and Blood Pressure
- Lifeline Assistance Program Sponsored by Verizon
- Liaison Services for the Deaf and Blind
- Assistance With the Purchase/Delivery of Prescription Medicine
- Meals on Wheels
- On-site Social and Recreational Programs
- Coordinating Transportation for Residents
- Nutritional Education and Consultation

These services are supplemented by services provided by Catholic Charities. In 1968, the Diocese established Catholic Charities to provide social and economic services to the needy of the community. With help from the Diocese, the United States Catholic Conference, and Lee County, Catholic Charities provides the following services for the elderly in residents;

- **The "Care Connection" Respite Program** is located at Our Lady of Grace Catholic Church in Beverly Hills, Citrus County, Florida. The mission of the "Care Connection" Respite program is to provide a quality, caring, community, center-based, professional caregiver respite program for individuals affected with Alzheimer's and other dementia related illness residing in Citrus County. The program provides affordable respite services one half-day per week. Other services available through the program include assessment, case management, care givers' support groups, clinical counseling, health screenings, as well as community information and referral. Funding for this program has been provided in part by a grant from the Brookdale/FAVOR Foundation.
- **The Interfaith Care givers Program** is an innovative, collaborative partnership between Catholic Charities and the Interfaith Coalition of Hernando County, Inc. The mission of the Interfaith Care givers Program is to provide elder care education and support services to congregational communities of all faiths in Hernando County. The program's initial goal is to provide education and training on elder issues to church communities in Hernando County. In addition, the program provides volunteer training and technical support to existing and new church-based ministries for the care of the Elderly.
- **The Elder care Program** is a volunteer-based program providing services to low income elderly who are homebound. Through a volunteer-client match, the program provides

visitation; telephone support; assistance with food shopping or essential errands; light meal preparation; light housekeeping; small repairs; and transportation to obtain essential services, among others. An extensive library of resources is available for elderly and their families. The Elder care Program through its Parish Connections component further provides technical assistance, workshops and speaker's bureau for Catholic Parishes wishing to begin or expand their parish-based elder care programs.

Supplementing the experience and wide-range of elder programs/services is Blessed Pope John XXIII Catholic Church. As with all projects sponsored by the Diocese, it is done in conjunction with a local parish. The Diocese has long realized that residents are positively impacted when associating a local church with a housing project. The local church is able to provide support services that are located in close proximity, so that the elderly residents may utilize these.

In the case of Blessed Pope John XXIII, this parish was established in 2002. The church has a variety of programs, which include;

- Thrift Store
- Emergency Assistance Program
- Hispanic Outreach
- Jesus the Worker Hispanic Mission Church
- Knights of Columbus
- Soup Kitchen
- Edge Middle School
- High School Youth Group
- Vacation Bible Study
- Blessed Little Angels Playgroup

The church also provides a community room which is used for meetings and gatherings. This would be available for elderly residents at the proposed Section 202 project.

## **OUTREACH TO THE MINORITY COMMUNITY**

The FHEO division of HUD looks at five factors when evaluating an applicant's outreach to the community. A total of 15 points is possible for sponsors that can demonstrate, to FHEO's satisfaction, involvement and outreach to the minority as judged by the following factors:

- 1(b)(1) — Experience in providing housing and/or support services to minorities
- 1(b)(2) — Document relationship over time with minority residents and the minority community.
- 3(c) — Suitability of the site, in that it provides opportunities to minorities
- 2(b) — Document that the project involves elements of such planning documents as the "Impediments to Fair Housing".
- 3(e) — The inclusion of the target population in development of the application

The following paragraphs demonstrate how the Sponsor affirmatively answers each of these FHEO factors.

The Sponsor has a long history of outreach to the minority community. This outreach effort starts with the Sponsor's efforts to hire minorities and continues with finding ways to better serve the minority community. This brief narrative addresses some of the needs within the minority community and how the Sponsors has responded or plans to respond to these needs. Evidence of the Sponsor's ties with the minority community is demonstrated by support letters, which can be found in Exhibit 3(d).

The Sponsor is keenly aware of its responsibility to serve residents of Lee County, regardless of their income, family status, race or sex. This narrative presents why the Sponsor has and will continue to aggressively serve all residents of the County.

The Diocese of Venice has a long history of serving elderly persons, regardless of ethnic origin. A review of the Sponsor's housing experience (at its existing Section 202 projects), shows that over 57 percent of all projects have a minority residential population which exceed that in the market area. This reveals that the Sponsor has been effective in promoting housing opportunities for minorities and encouraging minority elderly to avail themselves of such opportunity.

***Ties to the Elderly and Minority Community:*** In addition to its elderly housing, the Sponsor has addressed the needs of the elderly via establishing a Commission for Older Catholics. This Commission seeks to coordinate and facilitate an ever increasing demand for services and spiritual support to the elderly. Outreach programs for the elderly, such as "Senior's Society" at St. Vincent de Paul Church, continue to be promoted on the parish level In an effort to meet the needs of this growing population.

On a more local level, Blessed Pope John XXIII offers senior programs in which seniors can participate in recreational, social, educational, and direct assistance services. In addition, a **Senior Elderly Advisory Committee** has been assembled to provide input into the HUD 202 application process. **This Committee is made up with both minority/non-minority elderly residents from both inside/outside of Blessed Pope John XXIII Catholic Church. The inaugural meeting was held at Blessed Pope John XXIII's sister parish, Jesus the Worker Hispanic Mission Church in Ft. Myers. Meeting minutes and sign-in sheets are attached.**

In addition, the Sponsor has secured multiple letters from minority residents which demonstrate the Sponsor's commitment and sensitivity to the needs of an ethnically diverse resident population.

As mentioned earlier in this exhibit, the Diocese's commitment to the minority population is most evident in its ministry and service to the migrant farm workers (Hispanics and Haitians)

with programs and outreach activities conducted throughout the ten-county regions. Social services and religious education programs as well as advocacy roles and legalization classes are but a few of the services currently provided, within the adjacent Blessed Pope John XXIII Church. **This congregation has a history of reaching out to minority residents through programs which include; (i) direct assistance to Spanish migrant farm workers; (ii) bilingual masses and social service programs; and (iii) partnerships with the local minority churches, which include offering programs and facilities for the use of these churches.**

*Sponsor Facilities:* The following is a list of affordable elderly projects, owned/operated by the Sponsor, and a description of the neighborhoods these facilities are located in. *It should be noted that at over 70 percent of all Sponsor facilities, the minority population at the facility is equal to or greater than the minority population within the neighborhood. This is a testament of the Sponsor's ability to aggressively market units to all residents regardless of their ethnic origin.*

<b>Diocese of Venice – Survey of Sponsor Supported Senior Housing</b>								
<u>Project Name/Address</u>	<u>Age</u>	<u>Type</u>	<u>Total Units</u>	<u>Percentage Occupancy</u>	<u>Minority Residents</u>	<u>Wait List</u>	<u>Census Tract Neighborhood</u>	<u>% Minority within Tract</u>
Villa San Carlos 2550 Easy Street Port Charlotte, FL 33952	1986	HUD 202	49	100%	8%	6-8 mo	208 Mixed	9%
Villa San Carlos II 22250 Vick Street Port Charlotte, FL 33980	1995	HUD 202 PRAC	52	100%	37%	1-1 ½ yr	210 Non-minority	5%
Casa Santa Marta 1576 8 <sup>th</sup> Street Sarasota, FL 34236	1982	HUD 202	78	100%	13%	1 ½ yr	1.01 Mixed	13%
Casa Santa Marta II 800 N. Lemon Avenue Sarasota, FL 34236	1995	HUD 202 PRAC	54	100%	20%	2 yr	1.01 Minority	13%
Villa San Marcos 13031 Palm Beach Blvd Ft. Myers, FL 33905	2002	HUD 202 PRAC	81	100%	2%	1 yr	302 Non-minority	11%
Villa Vincente 13031 Palm Beach Blvd Ft. Myers, FL 33905	2004	HUD 202 PRAC	60	100%	11%	9 months	302 Mixed	11%
Holy Cross Manor 504 26 <sup>th</sup> Street Palmetto, FL 34221	2006	HUD 202 PRAC	68	100%	8% (a)	1 yr	14.01/2/2.52 Non-minority	0%
Holy Cross Manor II 504 26 <sup>th</sup> Street Palmetto, FL 34221	NA(b)	HUD 202 PRAC	68	NA	NA	NA	14.01/2/2.52 Non-minority	0%
<b>TOTAL/AVG</b>	—	—	<b>510</b>	—	<b>16%</b>	—	—	<b>16%</b>

(a) The City of Palmetto total minority population is 2.5 percent.  
(b) Construction to start Fall 2009.

**Need For Housing Amongst Minority Residents:** The 2000 Census indicates a disproportionately greater need regarding the correction of housing problems for minority households in Lee County. However, this is due to the income disparity that is also indicated in the 2000 Census. While the County's minority households represented 12 percent, minorities represent a much greater percentage of low-income households. However, other variables such as tenure and household type and size also play a significant role in this regard, as noted below in the following chart.

**Promoting Greater Housing Opportunities for Minorities:** There are nine (9) HUD-assisted housing projects for low-income elderly in Lee County. Two of the existing projects are located in areas of minority concentrations, four are located in neighborhoods with a mixed population and three are located in non-minority areas. The following is a summary of each of these projects.

Survey of Senior Housing in Lee County, Florida						
<u>Project Name/Address</u>	<u>Type</u>	<u>Total Units</u>	<u>Percentage Occupancy</u>	<u>Waiting List</u>	<u>Census Tract</u>	<u>% Minority</u>
Ft. Myers Presbyterian Community 1925 Virginia Ave Fort Myers, FL 33901 239-332-1050	HUD 202	180	100%	9 mo.	8	10%
Palm City Garden Apts 1625 Marsh Ave Ft. Myers, FL 33905 239-334-1303	HUD 202	100	100%	9 mo.	5.04	44%
Sandpiper Run 2075 Collier Ave Fort Myers, FL 33901 239-931-0220	HUD 202 PRAC	59	100%	1yr.	11	50%
Villa Vincente 13071 Palm Beach Blvd Fort Myers, FL 33905 239-693-1333	HUD 202 PRAC	60	100%	6 mo.	302	13%
Sunshine Villas 1200 Broad St W Lehigh Acres, FL 33936 239-369-9161	HUD 202	216	100%	6 mo.	403.04	16%
Sunshine Villas South 1291 Broad St W Lehigh Acres, FL 33936 239-369-9161	HUD 236	80	100%	6 mo.	403.4	16%
Woodward Manor 1301 Woodward Ct Lehigh Acres, FL 33936 239-369-1414	HUD 202	102	100%	1 yr.	403.04	16%

Hatton Rogers Apts 4250 Hatton B Rogers N. Fort Myers, FL 33903 239-995-6100	HUD 202 PRAC	54	100%	1 1/2 yr.	208	2%
Palm Harbor Apts 1081 Palm Ave N. Fort Myers, FL 33903 239-995-2600	HUD 202	81	100%	1 yr.	206	6%
<b>TOTAL</b>		<b>932</b>				
Lee County's Minority Population is 12.3%						

This is a situation where there is existing HUD-assisted housing for the elderly in both minority and non-minority areas. The proposed project would be located in Census Tract 401.06, which is a non-minority census tract.

The Sponsor will continue (with the proposed site) to promote and provide housing opportunities for minority elderly residents in the following three ways. Because the project is located adjacent to census tracts of minority concentration, minority residents will have easy access to this project. The Sponsor is dedicated to both the letter and spirit of equal opportunity. Secondly, a review of the Sponsor's housing experience at other sites reveals that the Sponsor will be effective in promoting housing opportunities for minorities and encouraging minority elderly to avail themselves of such opportunity. Third, Blessed Pope John XXIII enjoys a close working relationship with the Hispanic communities via their sister parish of Jesus the Worker Hispanic Mission Church in Ft. Myers. Outreach efforts will involve partnering with this church.

**Sponsor Experience in Fair Housing:** Individual property managers regularly attend fair housing training. Attached to this Fair Housing Narrative are details on this training.

#### **Relationship with Minority Residents Organizations over Time**

Serving minority residents and working with minority organizations is not something that the Sponsor started recently. This idea is integrated to the Sponsor's mission and has been done since its inception. As previously noted, most all of the Sponsor's projects and/or programs serve minority populations at or greater than that which exists within the market place. The Sponsor has been able to achieve these results by utilizing minority-based newspapers when placing ads and by partnering with minority organizations to distribute project information and brochures.

At the end of this section are samples of Affirmative Fair Housing Marketing Plans and newspaper ads placed in minority papers. The following is a sample list of some selected organizations and papers the Sponsor utilizes when reaching out to minority residents.

- Hispanic American Alliance (Hispanic)
- Tempo Magazine (African-American)
- NAACP (African-American)
- North River News (African-American)
- Neighbors (African-American)
- Filipino American Association of SW Florida (Hispanic)

### **Fair Housing Impediments**

The purpose of designing and implementing the Analysis of Impediments to Fair Housing for Lee County (AI) was to fulfill the Certifications made by Lee County BOCC in its Consolidated Plan. The AI represents year one's accomplishment of a Five-Year Fair Housing Strategic Plan. Lee County's AI was based on a model fair housing analysis provided by HUD to county staff at a Fair Housing Workshop in early October 1995. The AI included a review of Lee County's demographics related to housing patterns by race. It also reviewed lending practices, availability of fair housing information, knowledge of fair housing practices, availability of public transportation in relation to work areas and other socio-economic factors, and reported the results two community-wide surveys regarding fair housing issues.

The AI revealed the need for an easier method for citizens to file fair housing complaints, and that the present county ordinance could be enforced more effectively. Certain historical factors attribute to this situation, viz. Lee County has not taken fair housing complaints since 1993. HUD has recently provided guidance emphasizing that fair housing ordinances be substantially equivalent to the federal Fair Housing Law, and/or that grantee jurisdictions have programs that affirmatively further fair housing. In spite of Lee County's previous approach to fair housing, which included minimal educational outreach, the focus was on taking complaints. Merely taking complaints was not pro-active enough, according to HUD, to meet the standards of affirmatively furthering fair housing for Lee County residents. As a result, Lee County is actively providing fair housing education, training, education, outreach and awareness initiatives in its attempt to address these issues.

The AI further revealed the absence of a fair housing program, which was evident from the public's survey responses -- most respondents were not aware of fair housing issues. Survey questions focused on the public's perception of property appraisers, bankers, real estate professionals, and others in the housing business. Respondents generally favored county government becoming more pro-actively involved in the development of a fair housing program. Two other factors impacting fair housing in Lee County were decent, affordable, rental housing opportunities for migrants and/or farm workers, and substandard housing conditions in existing communities. These issues require pro-active measures in order to respond to critical areas of unmet need, as identified by the public. The AI concluded that county staff will develop program

options for a core-service fair housing program. Currently, 80 grantee jurisdictions in the United States have a substantially equivalent fair housing ordinance. The AI suggests doing a program review of these jurisdictions in order to develop and implement a well-rounded Lee County program.

Within this report, Lee County identified several impediments to fair housing and these include:

1. Lee County has done little to affirmatively further fair housing.
2. Lee County has not defined what “affirmatively furthering fair housing” means for its citizens.
3. Lee County has no organizations dedicated to fair housing.
4. Survey results show that most residents are not familiar with “fair housing” issues.
5. Lee County has assigned almost no CDBG funds to affirmatively further fair housing.
6. There are several examples of the “not in my backyard (NIMBY) attitude in Lee County.

Of these six impediments, The Diocese of Venice is positively impacting several. The following is how the Sponsor’s involvement in the Section 811 program has actively reduced identified impediments.

- Response to Impediments 1, 2, 3, & 4 — The Diocese of Venice has actively marketed rental units to residents regardless of their ethnic origin. The Diocese success of 20 percent of its residents being minorities is attributed to: i) The Diocese extensive outreach and networking with minority community-based organization; ii) The Diocese aggressive affirmative marketing program; iii) The Diocese willingness to sensitize staff on fair housing issues by sponsoring and paying for a fair housing workshop; and iv) by The Diocese placing projects in both mixed race and non-mixed race areas.
- Response to Impediments 1, 2, 3, & 4 — The Diocese of Venice success has resulted in a definition of fair housing. In the Diocese terms, this is when minorities are represented in terms of those receiving services or apartments in numbers at or above the portion of the minority population to the total population.
- Response to Impediments 6 — The Diocese of Venice has not backed down from challenges to neighbors, and has actively pursued the rights of residents. For example, the Diocese progressed through public hearings and received some opposition. The Diocese met with this opposition to articulate the projects and its impact upon neighboring land owners. As a result of this education and outreach process, the opposition was reversed to support for the project.

It is clear from these examples that the Diocese of Venice has been at the forefront of promoting

fair housing to residents regardless of their ethnic origin.

### **Conclusion**

HUD has indicated the methodology in which projects will be rated is as follows.

The suitability of the site from the standpoints of promoting a greater choice of housing opportunities for minorities and persons with disabilities and affirmatively furthering fair housing. In reviewing this criterion, HUD will assess whether the site meets the site and neighborhood standards at 24 CFR 891.125(b) and (c) by examining relevant data in your application or in the HUD Office. If appropriate, HUD may visit the site.

The site will be deemed acceptable if it increases housing choice and opportunity by:

Expanding housing opportunities in non-minority neighborhoods if located in such a neighborhood. ("Non-minority area" is defined as one in which the minority population is lower than 10 percent.)

Within the market area, projects are located both inside and outside of areas of minority concentration. **The proposed project is located in a non-minority area and should be awarded the full points.**

## 3(f) Elderly Input

**Diocese of Venice  
Involvement of Elderly Residents  
HUD Section 202 Application**

The Sponsor had solicited the assistance and involvement of elderly persons, both minority and non-minority, in the development and preparation of this application, and in the project itself. These persons were asked to contribute in how to improve housing and the delivery of services to future resident. This was accomplished by arranging meetings at existing Diocese of Venice projects. The Diocese has found that some of the best input originates from those residents residing in HUD Section 202 projects. Valuable feedback involves such subjects as;

- Management
- Unit Design
- Marketing
- Security
- Transportation
- Services
- Community Space

A meeting was held in 2009 at Blessed Pope John XXIII Catholic Church's sister parish, Jesus the Worker Hispanic Mission Church in Ft. Myers. It was held at this location in an effort to outreach to the minority community in Ft. Myers (see attached notes from the meeting). In addition, excerpts from previous meetings held in 2008, 2003 and 2002 are enclosed, along with sign in sheets for participants. It is anticipated that the Diocese will reconvene this group meeting in Ft. Myers after announcement of funding awards and periodically throughout the development process.

MINUTES  
MEETING OF ADVISORY COMMITTEE  
FOR  
BLESSED POPE JOHN 23<sup>RD</sup>  
MAY 27, 2009

The meeting was held in the church sanctuary of Blessed Pope John 23<sup>rd</sup>, located at 13060 Palomino Lane, Ft. Myers, Florida on May 27, 2009 at 8:30 am. There were 41 parishioners in attendance.

Father Robert Tabbert opened the meeting with an explanation of the purpose of the meeting and his history with HUD 202 housing when he was at the St. Martha's Parish in Sarasota. He informed them that the Diocese of Venice currently has seven HUD 202s with funding for the eighth property in Palmetto. He gave the parishioners the basic information about the project, i.e. 68 units, one bedroom/one bath apartments, 3 story building on 3 ½ acres adjoining the church property. He spoke of the need for this type housing and the obligation of the church to help take care of our senior citizens.

He then introduced Kathy Bergloff and Yajaira Lopez of SPM, LLC, the Management Agent for the properties within the Diocese. Kathy spoke of the eligibility criteria, including age and income restrictions, and went over the application process, assuring the Committee that applicants will be put on the waiting list on a first-come/first serve basis and will be screened according to HUD regulations. She briefly spoke of the certification/recertification process and how the rent is determined for each resident.

The majority of the Committee had very positive comments about the proposed Project and indicated that they agreed that there is a tremendous need for this type housing and were happy to be a part of it.

Topics brought up for discussion included, but were not limited to:

1. Elevators - It was strongly suggested that the building have two (2) elevators.
2. Parking – The Committee wanted to be assured that ample parking would be provided and wanted to make sure that the parking for the Project would not over-lap into the parking area for the church, since their parking lot is full for services.
3. Security – The Committee wanted to know what type security would be provided and how the fire alarm/pull-cord system would be monitored.

4. Community Space – The Committee wanted to be assured that the community room would be used for classes as well as activities for the residents.
5. An on-site manager was much preferred over a manager in a different location.
6. Vinyl floors vs. carpet - The Committee was divided on their preference between the two. Those who spoke in favor of vinyl indicated the reason as being vinyl offers a higher level of cleanliness and is less likely to cause problems with allergies. Those who spoke in favor of carpet indicated their fear of residents putting throw rugs down if they had vinyl, and felt that carpet offers a warmer and more “homey” feeling and is more appealing aesthetically.
7. Tubs vs. showers – The Committee unanimously spoke in favor of showers over tubs.
8. Ceiling fans – They felt that a ceiling fan in the living room and bedroom would be very important.
9. Refrigerator – The Committee was divided between the preference of having a freezer on the bottom versus the standard refrigerator with the freezer on the top. No one preferred the side-by-side style.
10. Beauty salon - It was agreed that an area for a hairdresser would be very nice, and it was believed that parishioners who are licensed in cosmetology would assist in providing these services to the residents.
11. Washer/Dryers - It was a consensus of opinion that a laundry room on each floor would be preferred over one laundry room for the entire building.
12. Library - The Committee felt very strongly about having a library for the residents.

The meeting adjourned at 10:00 am, and participants continued their discussion and questions in the vestibule of the church where coffee was served.

Blessed Pope John 23<sup>rd</sup>

Senior Citizen Section 202 Advisory Committee

Fort Myers, FL Project

DATE: May 27, 2009

Attendance List

<u>Name</u>	<u>Age</u>	<u>Disabled Y/N</u>
[REDACTED]	77	N
[REDACTED]	81	N
[REDACTED]	79	N
[REDACTED]	73	N
[REDACTED]	47	N
[REDACTED]	62	N
[REDACTED]	62	N
[REDACTED]	81	N
[REDACTED]	57	M
[REDACTED]	63	M
[REDACTED]	62	M
[REDACTED]	92	"
[REDACTED]	76 1/2	M + F.
[REDACTED]	81	F
[REDACTED]	65	F

Blessed Pope John 23<sup>rd</sup>

Senior Citizen Section 202 Advisory Committee

Fort Myers, FL Project

DATE: May 27, 2009

Attendance List

Name	Age	Disabled Y/N
[REDACTED]	64 63	Y/N N
[REDACTED]	67 73 (74)	Y
[REDACTED]	(47)	
[REDACTED]	86	No
[REDACTED]	80	No
[REDACTED]	70	No
[REDACTED]	67	No
[REDACTED]	78-77	No
[REDACTED]	40	No
[REDACTED]	(73) →	NO
[REDACTED]	(77) →	NO
[REDACTED]	64	No
[REDACTED]	73 (both)	NO
[REDACTED]	77	No
[REDACTED]	75	No

Blessed Pope John 23<sup>rd</sup>

Senior Citizen Section 202 Advisory Committee

Fort Myers, Fl Project

DATE: May 27, 2009

Attendance List

<u>Name</u>	<u>Age</u>	<u>Disabled Y/N</u>
[REDACTED]	84	N
[REDACTED]	84	N
[REDACTED]	73	Y
[REDACTED]	65	N
[REDACTED]	69	N
[REDACTED]	67	N
[REDACTED]	65	N
[REDACTED]	63	N
[REDACTED]	81	Y

## **RE-SUBMISSION OF PREVIOUSLY SUBMITTED INFORMATION**

Per the HUD notice of funding under the Application Submission Requirements, it states that "... you will be able to submit information and exhibits you have previously prepared for prior applications under Section 202, Section, or other funding programs. Examples of exhibits that may be readily adapted or amended to decrease the burden of application preparation include, among others, those on previous participation in the Section 202 or Section 811 Programs, your experience in provision of housing and services, supportive service plan, community ties, and experience serving minorities.

In this section, we are including updated support letters, along with support letters previously submitted.

Proposed HUD 202 Project for Palmetto, FL (Holy Cross Manor II)

Senior Citizen Section 202 Advisory Committee

Meeting #1 – Services

Date: 04/03/08

Agenda

**OVERVIEW**

1. Inform members of the elderly programs now in place.
2. Inform members of interest in community for elderly housing.
3. Inform members of proposed HUD project.
4. Questions to members – What is the feeling about elderly services currently delivered and what types of services should be provided at new project.
5. Questions:

**DESIGN INPUT**

1. Review general scope of site/building plans.
2. Review rent agreement and resident eligibility criteria.
3. Obtain feedback on the following;

**Height (shower)** – residents felt the lip on the shower pan should be a bit higher to prevent water from spilling out onto the floor or that the grade in the shower regarding the drainage be more adequate. However as far as the height of the shower head they all felt it was accommodating.

**Need for elevators** – Definite need.

**Type of community space** – They all agree when they state the community room seems to cold and sterile for them, too institutional like. The seats are not comfortable to sit for periods of time that would allow them to view a movie etc. The comment that was said was that they feel

it is more on the assisted living rather than the active senior level. They would enjoy more comfortable seating, square instead of round tables and better lighting.

**Outside recreational areas** – Other than a sitting area, they feel they have no recreational areas outside. They would like shuffle board, walking trail or other outside activity to join in.

**Connection with City park system** – Bus system is not accessible to this property. The group questioned feel as though a bus stop at the actual property would be very useful.

**On site –vs- off site manager** – Most are in favor of on site manager.

**Color scheme** – The group suggests darker colors as the light colors show too much dirt and wear and tear.

**Entrance system to communicate with residents** – All are in the favor of the system. They like it and find it easy to use.

**Emergency pull cords** – locations- Most feel they are not necessary and they try to hide them with pictures or decorations. However if the apartment homes have to have them then they feel the one in the bathroom is ok but rather than having one in the bedroom they feel the kitchen would be a better place.

**Types of appliances** – They are happy with the appliances.

**Vinyl floor –vs- carpet** – Vinyl. They are against the carpet as it gets dirty and has no pad under it anyway they prefer vinyl.

**Tubs –vs- showers- Showers.**

**Ceiling fans** – The residents feel the ceiling fans should be mandatory and should come with the apartment, they feel they should not have to pay for the fan or the installation.

**Number of fully accessible units** – no comments

**HUD rails in hallways** – They like and feel they should be on both sides of hallway

**Refrigerator** – side/side or upper lower – Equally mixed on this.

**Beauty salon on site** – 100% for it.

**Washer dryer on one floor or on each floor** – Would like larger laundry facilities on each floor with rolling laundry carts to carry to and from residence

**Other design issues or recommendations-** Additional storage inside apt. homes. More parking, screened in patios or screened in/outdoor areas to enjoy outdoors, a light in the living room and a real dining area in the apt. home larger than the current area.

Proposed HUD 202 Project for Palmetto, FL (Holy Cross Manor II)  
 Senior Citizen Section 202 Advisory Committee

Attendance Sheet

Date: April 3 2008

Attendance List

<u>Name</u>	<u>Age</u>	<u>Disabled Y/N</u>
[REDACTED]	95	N
[REDACTED]	83	N
[REDACTED]	74	N
[REDACTED]	89	
[REDACTED]	80	N
[REDACTED]	89	N
[REDACTED]	86	N
[REDACTED]		No
[REDACTED]		No
[REDACTED]		WD
[REDACTED]		W/O
[REDACTED]		NO
[REDACTED]	78	NO
[REDACTED]		NO



**Resident Meeting information**

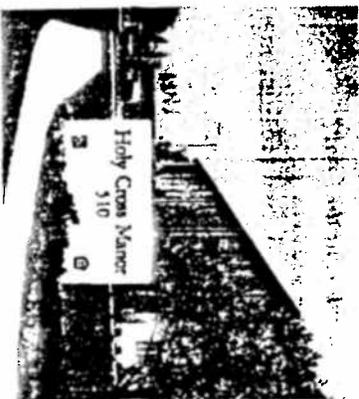
*Holy Cross Manor, is a non-denominational rental housing community with 68 apartments, designed to provide housing for low income seniors. Holy Cross Manor is owned and operated by Holy Cross Manor, Inc., a non-profit corporation operating under the rules and regulations of the United States Department of Housing and Urban Development (HUD).*



**Your Holy Cross Manor home would include the following:**

- ❖ Individually controlled Heating and Air Conditioning
- ❖ Individual Mail Boxes
- ❖ Self-Service Elevators
- ❖ Beautifully Landscaped Grounds
- ❖ Shade Trees
- ❖ Patio
- ❖ Parking Lot
- ❖ Convenient to Business District and Shopping Mall

## **Holy Cross Manor**



**510 26<sup>th</sup> Street W.  
Palmetto, FL 34221**

**941-729-2063**

**TTY - 800 955-8771**

**QUESTIONS AND ANSWERS  
CONCERNING  
HOLY CROSS MANOR**

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***How old do you have to be?***

Applicants must be at least 62 years of age at time of application.

***Is there a limit on my income limit?***

Yes, your gross income must be less than the established HUD guidelines in order for you to qualify.

***How much rent do I pay?***

The maximum rent you will pay will be 30% of your adjusted gross income.

***Are the apartments furnished?***

So that your apartment will truly look like your own home, you will bring your own furniture and familiar possessions and furnishings.

***What is provided with the apartment?***

Each apartment kitchen is furnished with a refrigerator and stove. In addition each apartment is provided with carpets, blinds, and central heat and air conditioning.

***What safety features are included with the apartments?***

All apartments have a built in smoke detector and fire sprinkler system. The bathrooms are equipped with grab bars.

***Will residents be able to control heating and air conditioning in the apartments?***

Yes, for your complete comfort, each apartment has its own central heating and air conditioning unit with individual controls.

***How big are the apartments?***

These are regular size apartments having a large living-room and dining-room combination, a full size kitchen, bath and one bedroom. There is sufficient closet and storage space.

***What about laundry facilities?***

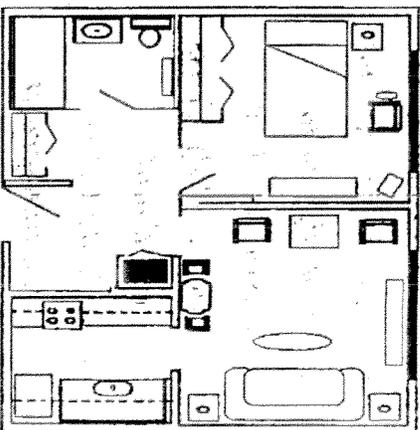
A laundry room is conveniently located on each floor; coin-operated washers and dryers are provided and are available 24 hours a day for your convenience.

***What services and activities are available?***

Recreational areas for card-playing and other communal activities are provided. A common lounge is available for quiet conversation. Assistance is offered in locating area social services available to the residents; and periodic in-house activities, both educational and recreational, are planned.

***What about the accessible units?***

Some apartments are specifically designed for persons with mobility impairments. The laundry facilities sidewalks, entrances and community room and are all accessible for persons with mobility impairments. A few apartments are designed for persons with hearing and visual impairments.



**Floor Plan  
For a  
Typical Apartment**

Diocese of Venice  
Senior Citizen Section 202 Advisory Committee  
Meeting on May 23, 2003  
At Trinity House

We informed the members present of the Diocese of Venice elderly programs that are now in place including Villa San Carlos, Villa San Carlos II, Casa Santa Marta, Casa Santa Marta II and Villa San Marcos.

We informed the members present of the Diocesan continued interest in providing additional housing for the elderly and that the next project would hopefully be in Palmetto, FL.

We discussed what the groups feeling was about the elderly services currently delivered and what types of services should be provided at the new project. Since this property is now, 10 months old, it does not have a service coordinator, at this time. The group felt that the services offered at Trinity House were wonderful at this time. These services include the newly formed Resident Association, morning coffee meetings, various resident-sponsored socials, reduction in telephone and electric bills, county provided transportation, etc. We discussed what additional services that the service coordinator could bring including, coordination of Medicare and Medicaid benefits, doctor visits, home health services for those in need and all the other services that the city, county and state offer for low income people. The group felt that these additional services would be greatly appreciated.

We reviewed the design of the proposed project, which is very similar to Trinity House and the residents had the following suggestions.

Bigger community room, as not even half of the 76 residents that reside in Trinity house can be accommodated by the existing community room.

They would also like the community room to be open to the main lobby.

Have a screen porch off the community room so that the residents can enjoy the outdoors. Without it, they have very little area to sit outdoors that is shady, and we need the shade in Florida.

Provide a linen closet in the apartments.

For all apartment doors to have a peep hole and door bell.

Bathroom fan on a separate switch so the light can be turned on and off by itself.

Digital thermostats would be better than the manual ones because they are easier for seniors to see and set.

More handicap parking as they feel that 3 spaces is not enough for 76 apartments for the elderly

Robert Harlow  
Property Manager

Vinyl floor vs. carpet - The group likes the carpeted apartments with the vinyl in the kitchen and bathroom. The one suggestion they had was to use a better grade of vinyl that does not require constant cleaning, stripping and waxing.

Tubs vs. showers - As usual, half like tubs and half like showers. The tub lovers want the tub so that they can soak in it. The shower lovers usually have a difficult time lifting their legs to get into the tub. The perfect solution would be unit that could convert from one to the other.

Ceiling Fans - All agreed that ceiling fans in the living room and bedrooms should be mandatory in Florida.

Number of Accessible units - This property has an over abundance of accessible units totaling 11 mobility accessible and two hearing/site impaired. The group felt that the 11 units was too many.

HUD rails in the hallways - All agreed that the rails in the hallways were wonderful.

Refrigerator side/side or upper/lower - Most would prefer the side by side saying that it is easier for them to use.

Beauty salon on-site - All agreed that space for a beauty salon on the property would be a wonderful benefit.

Washer/dryer - The overall opinion of the group prefers one central laundry room rather than one set on each floor. Many do more than one load at a time and the one laundry room enables them to do this.

Other Design issues/recommendations - The following suggestions were offered:

Vertical blinds in the apartments rather than the horizontal pull ups. With sliding panes at each end of the window, it is impossible to open them easily without pulling up the entire blind. Also, the vertical blinds collect less dust and are easier to clean.

A light over the kitchen sink was requested because when you stand in front of the sink a shadow is cast over your work area from the only ceiling light.

Bigger vanities and storage areas in the bathroom was requested.

More shaded areas outside the building for the residents to walk and sit.

A back door exit/entrance from the lobby area for those taking their pets and/or bicycles in and out. It would have to be an electronically controlled door so that their entry cards/fobs would work at both the front and back doors.

Respectfully submitted,



Robert Harlow  
Property Manager

Diocese of Venice  
Senior Citizens Section 202 Advisory Committee  
May 23, 2003

Attendance List

Name	Age	(Y/N) Disabled	Ethnicity
[REDACTED]	74	N	A/SP
[REDACTED]	69	Y	African American
[REDACTED]	66	Y	African American
[REDACTED]	82	?	white
[REDACTED]	89	?	white
[REDACTED]	67	N	white
[REDACTED]	68	Y	white
[REDACTED]	81	N	white
[REDACTED]	78	N	African American
[REDACTED]	70	with large leg cast	
[REDACTED]	76	N	white
[REDACTED]	85	N	white
[REDACTED]	72	N	white
[REDACTED]	64		African American
[REDACTED]	70		B
[REDACTED]	76	Y	W
[REDACTED]	79	N	W
[REDACTED]	63		W
[REDACTED]	67	Y	W
[REDACTED]	70	N	W
[REDACTED]	69	N	W