

# ***Request for Proposal***

**332-8812**

Community Housing Development Organizations (CHDOs) for various types of affordable housing programs

***Opens January 8:<sup>th</sup>, 2003 at 2:00 p.m.***



*Venice of America*

***City of Fort Lauderdale***

***Issued for Community and Economic Development  
by the Procurement & Materials Management Division***

***Kirk Buffington, C.P.M, Manager, Procurement and Materials Management  
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***(954) 828-5140***

## PART I – INTRODUCTION/INFORMATION

### PURPOSE

The City of Fort Lauderdale, Florida (City) is seeking proposals under the U. S. Department of Housing and Urban Development (HUD) Home Investment Partnership Program (HOME) from qualified Community Housing Development Organizations (CHDOs) to encourage the redevelopment of several rental properties, which are in foreclosure throughout the Northwest quadrant of the City. The City has designated \$315,800 of 2002-2003 HOME funds to assist in this activity, which represents approximately 33 percent of the City's \$1,116,000 annual HOME allocation.

### INFORMATION AND CLARIFICATION

For information concerning procedures for responding to this RFP, contact **Kirk Buffington, Manager, Procurement and Materials Management at (954) 828-5933**. For information concerning the scope of services, contact Glennie Simmons, Community and Economic Development Department, Community Development Division at (954) 828-4522. Such contact shall be for clarification purposes only. Material changes, if any, to the scope of services or bidding procedures are transmitted by written addenda only.

It is preferred that all questions be submitted in writing to the Procurement Division, 100 North Andrews Avenue, Fort Lauderdale, FL 33301, attn: **Kirk Buffington**. To facilitate prompt receipt of questions, they can be sent via FAX to **(954) 828-5576**, attn: **Kirk Buffington**, or via e-mail: [kirkb@ci.fort-lauderdale.fl.us](mailto:kirkb@ci.fort-lauderdale.fl.us). Questions of a material nature must be received prior to the cut-off date specified in the RFP Schedule. Proposers please note: No part of your proposal may be submitted via FAX. The entire proposal must be submitted in accordance with the Instructions to Proposers contained in this RFP.

### ELIGIBILITY

To be eligible to respond to this RFP, the non-profit must be an eligible CHDO meeting the following criteria:

1. Be a private non-profit corporation organized under state or local laws;
2. Have no part of its net earnings inuring to the benefit of any member, founder, contributor, or individual;
3. Is neither controlled by, nor under the direction of, individuals or entities seeking to derive profit or gain from the organization. A CHDO may be sponsored or created by a for-profit entity, but:
  - a. the for-profit entity may not be an entity whose primary purpose is the development or management of housing, such as a builder, developer, or real estate management firm;
  - b. the for-profit entity may not have the right to appoint more than one-third of the membership of the organization's governing body. Board members appointed by the for-profit may not appoint the remaining two-thirds of the board members; and
  - c. the CHDO must be free to contract for goods and services from vendors of its own choosing.
4. Have a tax exemption ruling from the Internal Revenue Service under section 502©(3) or (4) of the Internal Revenue Code of 1986. New non-profits must show evidence of application for 501©(3) or

(4) status at time of submission of RFP, and must be designated a 501©(3) or (4) before any funds may be obligated.

5. Does not include a public body (including the City) or an instrumentality of a public body. An organization that is state or locally chartered may qualify as a CHDO; however, the state or local government may not have the right to appoint more than one-third of the membership of the organization's governing body and no more than one-third of the board members can be public officials; board members appointed by the state or local governmental agency may not appoint the remaining two-thirds of the board.
6. Have standards of financial accountability that conform to **24 CFR 84.21, "Standards for Financial Management Systems."**
7. Have, among its purposes, the provision of decent housing that is affordable to low and moderate income persons, as evidenced in its charter, articles of incorporation, resolutions or by-laws;
8. Maintains accountability to low-income community residents by:
  - a. Maintaining at least one-third of its governing board's membership for residents of the City of Fort Lauderdale or Broward County low-income neighborhoods, other Fort Lauderdale low-income community residents, or elected representatives of low-income neighborhood organizations in Fort Lauderdale or Broward County. "Community" may mean a neighborhood or neighborhoods, the City, or Broward County; and
  - b. providing a formal process for Fort Lauderdale's low-income program beneficiaries to advise the organization in its decisions regarding the design, citing, development, and management of affordable housing;
9. Have a demonstrated capacity for carrying out activities assisted with HOME funds. An organization may satisfy this requirement by hiring experienced, accomplished key staff members who have successfully completed similar projects, or a consultant with the same type of experience and a plan to train appropriate key staff members of the organization; and
10. Have a history of serving the community within which housing to be assisted with HOME funds is to be located. In general, an organization must be able to show one year of serving the community. However, a newly created organization formed by local churches, service organizations, or neighborhood organizations may meet this requirement by demonstrating that its parent organization has at least a year of serving the community.

#### 11. PRE-PROPOSAL CONFERENCE

A pre-proposal conference will be held at the Community Development Division, 1409 NW 6<sup>th</sup> Street (Sistrunk Blvd.), Conference Room, Fort Lauderdale, Florida 33311 at **10:00 A.M.** on the date listed in the schedule section of this RFP. Written addenda will be issued, if required, in accordance with the schedule section of this RFP. No variation in price or service shall be permitted based upon a claim of ignorance. Submitting a proposal will be considered evidence that the CHDO is familiar with the nature and extent of the work and any local conditions that may in any manner affect the work to be done and the equipment, materials, parts and labor required. While attendance is not mandatory, meeting with city staff at other times will not be available. It is strongly suggested that all proposers attend the pre-proposal conference and site visit.

## 12. MINORITY-WOMEN BUSINESS ENTERPRISE PARTICIPATION

It is the desire of the City of Fort Lauderdale to increase the participation of minority (MBE) and women-owned (WBE) businesses in its contracting and procurement programs. While the City does not have any preference or set aside programs in place, it is committed to a policy of equitable participation for these firms. Proposers are requested to include in their proposals a narrative describing their past accomplishments and intended actions in this area. If proposers are considering minority or women owned enterprise participation in their proposal, those firms, and their specific duties must be identified in the proposal. If a proposer is considered for award, he/she will be asked to meet with City Staff so that the intended MBE/WBE participation can be formalized and included in the subsequent contract.

See General Conditions (GC) Section 1.08 for MBE and WBE definitions. The GC is included in this RFP as Exhibit A.

13. ALL BIDDERS/PROPOSERS PLEASE NOTE: Any bidder or proposer submitting a response to this solicitation must comply, if applicable, with City of Fort Lauderdale Ordinance No. C-00-27, Lobbying Activities. Copies of Ordinance No. C-00-27 may be obtained from the City Clerk's Office on the 7th Floor of City Hall, 100 N. Andrews Avenue, Fort Lauderdale, Florida. The ordinance may also be viewed on the City's website at <http://ci.ftlaud.fl.us/documents/index.htm>

PART II – RFP SCHEDULE

Release RFP	12/09/02
Pre-Proposal Conference <b>(10:00 A.M., 1409 NW 6<sup>th</sup> Street (Sistrunk Blvd.), Conference Room</b>	12/18/02
Last Date for Receipt of Questions of a Material Nature	12/20/02
Addenda Release (If required.)	12/24/02
PROPOSAL DUE (Prior to 2:00 PM)	01/08/03
Evaluation Committee will Review and Short List Proposals	01/16/03
Oral Interviews with Finalists and Selection of First Ranked Proposer	01/23/03
City Commission Award of Contract (Estimated)	02/18/03
Final Execution of Contract by City (Estimated)	03/24/03

## PART III – SPECIAL CONDITIONS

1. GENERAL CONDITIONS – Exhibit A - are included and made a part of this RFP.

2. VARIANCES

While the City allows Proposers to make variances to the RFP's terms, conditions, and specifications, the number and extent of variances taken will be considered in determining proposal responsiveness and in allocating proposal evaluation points. See Section 1.06 of GC.

3. PUBLIC ENTITY CRIMES

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in section 287.017, Florida Statutes, for category two(2) for a period of 36 months from the date of being placed on the convicted vendor list.

4. NEWS RELEASES/PUBLICITY

News releases, publicity releases, or advertisements relating to this contract or the tasks or projects associated with the project shall not be made without prior City approval.

5. RFP DOCUMENTS

CHDOS shall examine this RFP carefully. Ignorance of the requirements will not relieve the CHDOs from liability and obligations under the Contract.

6. PROPOSERS' COSTS

The City shall not be liable for any costs incurred by Proposers in responding to this RFP.

7. RULES AND PROPOSALS

The signer of the proposal must declare that the only person(s), company or parties interested in the proposal as principals are named therein; that the proposal is made without collusion with any other person(s), company or parties submitting a proposal; that it is in all respects fair and in good faith, without collusion or fraud; and that the signer of the proposal has full authority to bind the principal Proposer.

8. CONFIDENTIAL INFORMATION

Florida law provides that municipal records shall, at all times, be open for personal inspection by any person. Section 119.01, F.S., the Public Records Law. Information and materials received by City in connection with all Proposers responses shall be deemed to be public records subject to public inspection upon award, recommendation for award or 10 days after bid opening, whichever occurs first. However, certain exemptions to the public records

law are statutorily provided for in Section 119.07, F.S. Therefore, if the Proposer believes any of the information contained in his or her response is exempt from the Public Records Law, then the Proposer must, in his or her response, specifically identify the material which is deemed to be exempt and cite the legal authority for the exemption; otherwise, the City will treat all materials received as public records.

#### 9. NO EXCLUSIVE CONTRACT ADDITIONAL SERVICES

CHDO agrees and understands that the contract shall not be construed as an exclusive arrangement and further agrees that the City may, at any time, secure similar or identical services at its sole option.

#### 10. INSURANCE REQUIREMENTS

At all times during the term of the Contract, the CHDO shall maintain in full force and effect, at its sole cost, the insurance coverage set forth below:

The CHDO is solely responsible for site security and shall procure, or have any subcontractors procure, General Liability Insurance, Comprehensive Builder's Risk Insurance, and Worker's Compensation Insurance coverage pertaining to the premises in a form, content, and amount acceptable to the City's Risk Manager. Such insurance supplied by the CHDO hereunder shall be primary.

1. Fire and extended coverage. The CHDO, or any of its subcontractors, at its expense, shall provide full theft, windstorm, fire and extended coverage on any property acquired, constructed or rehabilitated, and personal property located on the premises by the CHDO, for the benefit of the City, the CHDO, and the new occupant, if applicable, as each party's interests may appear, in an amount not less than one hundred percent (100%) of the replacement value of the property.
2. Worker's Compensation. The CHDO, or any of its subcontractors, shall provide, carry, maintain and pay for necessary Worker's Compensation Insurance for the benefit of its employees with the following limits: Worker's compensation-statutory limits; Employer's Liability-one hundred thousand dollars (\$100,000.00).
3. Liability Insurance. The CHDO, or any of its subcontractors, shall, at its own expense, provide, pay for, and continuously maintain, comprehensive and all inclusive public liability and property damage insurance for the benefit to the City, with a policy limit of not less than one million dollars \$1,000,000.00 combined single limits, which coverage shall include property damage and personal injuries, including death, and shall include the City of Fort Lauderdale as an additional named insured.
4. Policies. Whenever, under the provisions of the agreement, insurance is required of the CHDO, the CHDO shall promptly provide the following:
  - (a) Certificates of insurance evidencing the required coverage's;
  - (b) Names and addresses of companies providing coverage's;
  - (c) Effective and expiration dates of policies;
  - (d) A provision in all policies affording City thirty (30) days written notice by any carrier of any cancellation or material change in any policy; and

(e) Provide to the Purchasing Division original certificates of such coverage and receive notification of approval of those certificates by the City's Risk Manager, prior to engaging in any activities under this contract.

5. Collection of Insurance. In the event of destruction of, or damage to, any of the premises and contents covered by insurance, the funds payable in pursuance of said insurance policies for repair and/or reconstruction shall be deposited in a commercial national bank located in Fort Lauderdale, Florida, selected by the City, as a trust fund, and said funds shall be used for the purpose of reconstruction or repair, as the case may be: first, all or any portion of the premises; second, improvements; and third, personal property, so damaged or destroyed. Such reconstruction and repair work shall be done by the CHDO, or any of its subcontractors, in strict conformity with the ordinances of the City and all governmental agencies having jurisdiction. Should the cost of reconstruction or repair exceed the amount of funds available from the proceeds of such insurance policy, then in such event, such funds shall be used as far as the same will permit in paying the cost of said reconstruction or repair and the CHDO, or any of its subcontractors, shall be responsible for the remaining funds. In the event that the cost of such reconstruction or repair work shall be less than the proceeds derived from such insurance policies, the surplus shall be payable to the CHDO.

6. Insurance provisions may be subject to some variations as may be required by participating financial lenders.

## 7. RECORDS

The CHDO, and any of its subcontractors, shall maintain during the term of the contract, all books of account, receipts, invoices, reports, and records in accordance with generally accepted accounting principles and standards. The form of all records and reports shall be subject to the approval of the City. Recommendations for changes, additions, or deletions by the City must be complied with by the CHDO. The city and the Comptroller General of the United States, or any of their authorized representatives, shall have the right of access to any pertinent books, documents, papers, or other records of the CHDO which are pertinent to the contract award, in order to make audits, examinations, excerpts, and transcripts.

The CHDO shall maintain and make available, in Broward County, Florida, such records and files for the duration of the contract and retain them for a period of three (3) years beyond the last day of the contract term. If any litigation, claim, negotiation, audit or other action involving the records has been started before the expiration of the 3-year period, the records must be retained until completion of the action and resolution of all issues which arise from it, or until the end of the regular 3-year period, whichever is later.

An annual audit of the CHDO, performed by an independent auditor, will be required. The auditor shall determine whether:

- (1) The financial statements of the CHDO present fairly its financial position and the results of its financial operations in accordance with generally accepted accounting principles;
- (2) The CHDO has internal accounting and other control systems to provide reasonable assurance that it is managing Federal financial assistance programs in compliance with applicable laws and regulations; and
- (3) The CHDO has complied with laws and regulations that may have a material effect on its financial statements and on the federal assistance program.

## 8. RIGHT TO SUBCONTRACT

The CHDO shall have the right to subcontract, but shall be held fully responsible and cannot be relieved of any liability under this contract on account of any subcontractor. All subcontracting must have prior written City approval. The City reserves the right to approve or reject any subcontractor. Approval of subcontractors shall not be unreasonably delayed or denied.

If any portion of the contract is to be performed by a subcontractor, the prime contractor shall provide to the City the name, address, telephone number, and principal contact of the proposed subcontractor; a description of the work to be performed; and the qualifications of the proposed subcontractor. Any construction contracts, rehabilitation or new construction for affordable housing with 12 or more units assisted with HOME funds must contain a provision requiring that not less than the wages prevailing in the City, as predetermined by the Secretary of Labor pursuant to the **Davis-Bacon Act** [(40 U.S.C. 276A-5) will be paid to all laborers and mechanics employed in the development of affordable housing involved, and such contracts must also be subject to the overtime provisions, as applicable, of the Contract Work Hours and Safety Standards Act (40 U.S.C. 327-332). Certification of compliance, in a format acceptable to the City, will be required prior to making any payment under such contract.]

## 9. CONTRACT COORDINATOR

The City will designate a Contract Coordinator. The duties of the coordinator will be:

1. liaison with the CHDO;
2. coordination and approval of all work under the contract;
3. assure consistency and quality of the CHDO's performance;
4. review and approve for payment all reimbursement requests.

The Coordinator, other City or federal representatives, shall have access to all work sites and the CHDO's records directly related to the contract.

## 10. UNCONTROLLABLE CIRCUMSTANCES ("Force Majeure")

The CHDO and the City will be excused from the performance of their respective obligations under this agreement, when and to the extent that their performance is delayed or prevented by any circumstances beyond their control, including fire, flood, explosion, strikes, or other labor disputes, acts of God or public emergency, war, riot, civil commotion, malicious damage, act or omission of any governmental authority, delay or failure or shortage of any type of transportation, equipment, or service from a public utility needed for their performance, provided that:

1. The non-performing party gives the other party prompt written notice describing the particulars of the Force Majeure, including but not limited to, the nature of the occurrence and its expected duration, and continues to furnish timely reports with respect thereto during the period of the Force Majeure;
2. the excuse of performance is of no greater scope and of no longer duration that is required by the Force Majeure;
3. no obligations of either party that arose before the Force Majeure causing the excuse of performance are excused as a result of the Force Majeure; and
4. the non-performing party uses its best efforts to remedy its inability to perform.

Notwithstanding the above, performance shall not be excused under this Section for a period in excess of thirty (30) days, provided that in extenuating circumstances, the City may excuse performance for a longer term. Economic hardship of the CHDO will not constitute Force Majeure. The term of this Agreement shall be extended by a period equal to that during which either party's performance is suspended under this section.

#### 11. STANDARDS OF WORK

The CHDO agrees that the performance of work described in this contract and pursuant to this contract shall be done in a professional manner and shall conform to industry standards. The CHDO warrants that all materials, equipment or appliances provided under this contract, by either the CHDO or any of its subcontractors, shall be new and in good working condition. The City's Community Development Division prior to payment shall approve all construction work.

## PART IV – TECHNICAL SPECIFICATIONS/CRITERIA FOR EVALUATION

### 1. PROJECT DESCRIPTION

The City is seeking proposals from qualified non-profit community housing development organizations (CHDOs) to acquire and redevelop affordable, rental housing within the corporate limits of the City of Fort Lauderdale that have been impacted by foreclosure actions throughout the NW community. The City will assist one or more CHDOs to develop, sponsor and/or own various types of affordable, rental housing, eligible under the U.S. Department of Housing and Urban Development (HUD) Home Investment Partnership Program (HOME). Regulations governing this program are at 24 CFR Part 92. The City has designated a minimum of \$369,800 for these activities, which may be used for any eligible rental housing development. The City has identified housing needs in its Consolidated Plan (Con Plan), which is available for review. The Section of the Con Plan summarizing housing needs is attached to this RFP as Exhibit B.

The City currently operates a rental rehab program that can be utilized in conjunction with CHDO funds to successfully complete this project. A description of that program is attached as Exhibit C. Proposers are encouraged to submit creative proposals, which utilize ongoing programs while providing maximum leverage for federal funds.

### 2. HOW THE CITY WILL WORK WITH THE CHDO

As appropriate and as needed, the City will provide technical assistance to the CHDO including, but not limited to, staff assistance for rehabilitation and construction review, directions for the preparation of documents for the programs, and a list of last known, available, foreclosed properties.

### 3. TYPE OF ACTIVITIES AND LEVEL OF FUNDING

1. The funds set aside for CHDOs will be used to carry out eligible HOME activities for rental housing, which they develop, own, and/or sponsor. Eligible activities include acquisition, reconstruction, moderate or substantial rehabilitation of non-luxury, rental housing with suitable amenities including real property acquisition, site improvement, conversion and other expenses including financing costs, relocation, expenses of displaced persons, families, businesses, or organizations.

The level of funds provided to the City would support the following activity:

Acquisition and rehabilitation of foreclosed and/or boarded up rental units. Approximately 4-6 units could be acquired and/or rehabilitated for use as rental housing for low-income households.

## PART V – CONSIDERATION FOR AWARD/AWARD PROCEDURES

It is the intent of the City to select CHDO(s) that can best achieve the development of affordable rental housing. CHDO(s) will be selected based upon the following criteria:

1. Affordability of the proposed units including feasibility of proposed costs with regard to acquisition, rehab costs, design, unit size and ratio of private funds to be included in the project.  
Total points available – 35.
2. Quality of proposed rental units including types of households to be assisted, design of the units, compatibility with surrounding community, quality of materials to be used and quality of amenities, if any.  
Total points available – 35.
3. Experience, qualifications, and past performance of proposer, principals and key staff associated with the proposed project or consultant(s) who will train staff.  
Total points available – 30.

Total Overall Points Available is 100 points.

An evaluation committee of qualified City Staff will conduct evaluation of proposals, or other persons selected by the City. It will be a two-step process. In step one; the committee will evaluate all responsible proposals based upon the information and references contained in the proposals as submitted. The committee will score and rank all responsible proposals and determine a minimum of three (3) to be finalists for further consideration. In the event there are less than three (3) responsive proposals, the committee will give further consideration to all responsive proposals received. The committee will then conduct discussions, for clarification purposes only, with the finalists and re-score and re-rank the finalists' proposals. The rankings will be provided to the City Commission for consideration. The top ranked proposer(s) resulting from this process will be recommended to the Fort Lauderdale City Commission for award. The number of proposer(s) recommended to the City Commission will be at the sole option of the City.

Information and references submitted will be considered in the award. The City may require visits to prior installations for projects as part of the evaluation process.

The City may require additional information, and Proposers agree to furnish such information. The City reserves the right to award the contract to that Proposer who will best serve the interest of the City. The City reserves the right, based upon its deliberations and in its opinion, to accept or reject any or all proposals. The City also reserves the right to waive minor irregularities or variations to the specifications and in the bidding process.

## PROPOSAL PAGES PART I – AFFORDABLE RENTAL HOUSING DEVELOPMENT PLAN

The following issues should be fully responded to in this part of your proposal in concise, narrative form or as required. Additional sheets should be used, but they should reference each issue and be presented in the same order.

A detailed affordable, rental housing development plan including information on:

1. description of the proposed rental housing development program;
2. type of assistance to be provided;
3. detailed listing of tasks to be undertaken;
4. a timetable or schedule of development;
5. roles and responsibilities of key personnel;
6. costs of development, including both hard and soft costs;
7. type of occupancy;
8. proposed target area, if any;
9. number of units;
10. number of households to be assisted;
11. a complete financial analysis of the project;
12. commitment from other funding source(s), if applicable;
13. specify sources and use of funds; \*
14. Detailed Development Budget; \*
15. Pro Forma. \*

**\* Required**

## PROPOSAL PAGES PART II – EXPERIENCE AND QUALIFICATION OF PROPOSER

The following issues should be fully responded to in this part of your proposal in concise narrative form, or as required. Additional sheets should be used, but they should reference each issue and be presented in the same order.

A detailed listing of the qualification of the CHDO, including:

1. current officers and membership personnel;
2. qualifications and resumes of all key personnel or consultants;
3. an organizational chart;
4. a current operating budget;
5. documentation of 501 (c) (3) status;
6. documentation of corporate status;
7. its most recent annual report
8. evidence that no part of its net earnings work to the benefit of any member, founder, contributor, or individual;
9. evidence that its standards of financial accountability conform to Attachment F of OMB Circular No. A-110 (rev). "Standards for Financial Management Systems."
10. evidence that it has, among its purposes, the provision of decent housing that is affordable to low-income and moderate-income persons, as evidenced in its charter, articles of incorporation, resolutions or by-laws;
11. evidence of its accountability to low-income community residents;
12. evidence of experience in the development of affordable rental housing, including names, addresses and references for past projects;
13. evidence of capacity to undertake the development of affordable rental housing programs; and
14. evidence that the CHDO has served the community within which the housing is to be located.
15. list all pending lawsuits that are concerned directly with the staff or part of your organization proposed for the contract.
16. list all judgments from lawsuits in the last 5 years that are concerned directly with the staff or part of your organization proposed for the contract.
17. list all bankruptcies filed by the organization or any of its principals in the last years.

The proposer understands that the information contained in these Proposal Pages is to be relied upon by the City in awarding the proposed Agreement, and such information is warranted by the proposer to be true. The proposer agrees to furnish such additional information, prior to acceptance of any proposal, relating to the qualifications of the proposer, as may be required by the City.

**PROPOSER, PLEASE INSURE THAT YOU HAVE SIGNED THE SIGNATURE PAGE OF THESE PROPOSAL PAGES. OMISSION OF A SIGNATURE ON THAT PAGE WILL RESULT IN REJECTION OF YOUR PORPOSAL.**

**COMPLETE AND RETURN THE REQUIRED NUMBER OF PROPOSAL PAGES, ONE (1) ORIGINAL AND EIGHT (8) COPIES, WITH ATTACHMENTS.**

PROPOSAL IDENTIFICATION; Please indicate on the face of your sealed proposal package the following:

RFP NO. 322-8812 Development of Affordable Rental Housing

**OPENS 01/08/03**

IF YOU DO NOT INTEND TO BID, PLEASE INDICATE THE REASON SUCH AS INSUFFICIENT TIME, DO NOT OFFER PRODUCT OR SERVICE, UNABLE TO MEET SPECIFICATIONS, SCHEDULE WOULD NOT PERMIT, OR ANY OTHER REASON BELOW. FAILURE TO BID OR RETURN THIS BID WITH YOUR NO BID COMMENTS PRIOR TO THE OPENING DATE AND TIME MAY RESULT IN YOUR FIRM BEING DELETED FROM OUR BIDDER'S LIST.

NO BID COMMENTS: \_\_\_\_\_

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## Exhibit A

### City of Fort Lauderdale GENERAL CONDITIONS

These instructions are standard for all contracts for commodities or services issued through the City of Fort Lauderdale Division of Purchasing. The City may delete, supersede, or modify any of these standard instructions for a particular contract by indicating such change in the Invitation to Bid (ITB) Special Conditions, Technical Specifications, Instructions, Proposal Pages, Addenda, and Legal Advertisement.

#### **PART I BIDDER PROPOSAL PAGE(S) CONDITIONS:**

- 1.01 **BIDDER ADDRESS:** The City maintains automated vendor mailing lists for each specific Commodity Class Item. Invitation to Bid (ITB'S) will be mailed first to a selection of Bidders who have fully registered on our system. Requests will be mailed to unregistered Bidders within a reasonable time frame for that bid only. The mailing of one ITB to the vendor, or a bid in return, will not register a vendor on our system. If you wish purchase orders sent to a different address, please so indicate. If you wish payments sent to a different address, please so indicate on your invoice.
- 1.02 **DELIVERY:** Time will be of the essence for any orders placed as a result of this ITB. The City reserves the right to cancel any orders, or part thereof, without obligation if delivery is not made in accordance with the schedule specified by the Bidder and accepted by the City.
- 1.03 **PAYMENT TERMS AND CASH DISCOUNTS:** Payment terms, unless otherwise stated in this ITB, will be considered to be net 30 days after the date of satisfactory delivery at the place of acceptance and receipt of correct invoice at the office specified, whichever occurs last. Bidder may offer cash discounts for prompt payment but they will not be considered in determination of award. If a Bidder offers a discount, it is understood that the discount time will be computed from the date of satisfactory delivery, at the place of acceptance, and receipt of correct invoice, at the office specified, whichever occurs last.
- 1.04 **TOTAL BID DISCOUNT:** If Bidder offers a discount for award of all items listed in the bid, such discount shall be deducted from the total of the firm net unit prices bid and shall be considered in tabulation and award of bid.
- 1.05 **BIDS FIRM FOR ACCEPTANCE:** Bidder warrants, by virtue of bidding, that his bid and the prices quoted in his bid will be firm for acceptance by the City for a period of ninety (90) days from the date of bid opening unless otherwise stated in the ITB.
- 1.06 **VARIANCES:** For purposes of bid evaluation, Bidder's must indicate any variances, no matter how slight, from ITB General Conditions, Special Conditions, Specifications or Addenda in the space provided in the ITB. No variations or exceptions by a Bidder will be considered or deemed a part of the bid submitted unless such variances or exceptions are listed in the bid and referenced in the space provided on the bidder proposal pages. If variances are not stated, or referenced as required, it will be assumed that the product or service fully complies with the City's terms, conditions, and specifications.
- 1.07 **NO BIDS:** If you do not intend to bid please indicate the reason, such as insufficient time to respond, do not offer product or service, unable to meet specifications, schedule would not permit, or any other reason, in the space provided in this ITB. Failure to bid or return no bid comments prior to the bid due and opening date and time, indicated in this ITB, may result in your firm being deleted from our Bidder's registration list for the Commodity Class Item requested in this ITB.
- 1.08 **MINORITY AND WOMEN BUSINESS ENTERPRISE PARTICIPATION AND BUSINESS DEFINITIONS:** The City of Fort Lauderdale wants to increase the participation of Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and Small Business Enterprises (SBE) in its purchasing activities. If your firm qualifies in accordance with the below definitions please indicate in the space provided in this ITB.

By receiving a bid, City does not necessarily accept any variances contained in the bid. All variances submitted are subject to review and approval by the City. If any bid contains material variances that, in the City's sole opinion, make that bid conditional in nature, the City reserves the right to reject the bid or part of the bid that is declared, by the City as conditional.

Minority Business Enterprise (MBE) "A Minority Business" is a business enterprise that is owned or controlled by one or more socially or economically disadvantaged persons. Such disadvantage may arise from cultural, racial, chronic economic circumstances or background or other similar cause. Such persons include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

The term 'Minority Business Enterprise' means a business at least 51 percent of which is owned by minority group members or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by minority group members. For the purpose of the preceding sentence, minority group members are citizens of the United States who include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

Women Business Enterprise (WBE) a "Women Owned or Controlled Business is a business enterprise at least 51 percent of which is owned by females or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by females.

Small Business Enterprise (SBE) "Small Business" means a corporation, partnership, sole proprietorship, or other legal entity formed for the purpose of making a profit, which is independently owned and operated, has either fewer than 100 employees or less than \$1,000,000 in annual gross receipts.

**BLACK**, which includes persons having origins in any of the Black racial groups of Africa.

**WHITE**, which includes persons whose origins are Anglo-Saxon and Europeans and persons of Indo-European decent including Pakistani and East Indian.

**HISPANIC**, which includes persons of Mexican, Puerto Rican, Cuban, Central and South American, or other Spanish culture or origin, regardless of race.

**NATIVE AMERICAN**, which includes persons whose origins are American Indians, Eskimos, Aleuts, or Native Hawaiians.

**ASIAN AMERICAN**, which includes persons having origin in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands.

## Exhibit A

### Part II DEFINITIONS/ORDER OF PRECEDENCE:

- 2.01 **BIDDING DEFINITIONS:** The City will use the following definitions in its general conditions, special conditions, technical specifications, instructions to bidders, addenda and any other document used in the bidding process:  
**INVITATION TO BID (ITB)** when the City is requesting bids from qualified Bidders.  
**REQUEST FOR PROPOSALS (RFP)** when the City is requesting proposals from qualified Proposers.  
**BID** – a price and terms quote received in response to an ITB.  
**PROPOSAL** – a proposal received in response to an RFP.  
**BIDDER** – Person or firm submitting a Bid.  
**PROPOSER** – Person or firm submitting a Proposal.  
**RESPONSIVE BIDDER** – A person whose bid conforms in all material respects to the terms and conditions included in the ITB.  
**RESPONSIBLE BIDDER** – A person who has the capability in all respects to perform in full the contract requirements, as stated in the ITB, and the integrity and reliability that will assure good faith performance.  
**FIRST RANKED PROPOSER** – That Proposer, responding to a City RFP, whose Proposal is deemed by the City, the most advantageous to the City after applying the evaluation criteria contained in the RFP.  
**SELLER** – Successful Bidder or Proposer who is awarded a Purchase Order or Contract to provide goods or services to the City.  
**CONTRACTOR** – Successful Bidder or Proposer who is awarded a Purchase Order, award Contract, Blanket Purchase Order agreement, or Term Contract to provide goods or services to the City.  
**CONTRACT** – A deliberate verbal or written agreement between two or more competent parties to perform or not to perform a certain act or acts, including all types of agreements, regardless of what they may be called, for the procurement or disposal of equipment, materials, supplies, services or construction.  
**CONSULTANT** – Successful Bidder or Proposer who is awarded a contract to provide professional services to the City.  
The following terms may be used interchangeably by the City: ITB, or RFP; Bid or Proposal; Bidder, Proposer, or Seller; Contractor or Consultant; Contract, Award, Agreement, or Purchase Order.
- 2.02 **SPECIAL CONDITIONS:** Any and all Special Conditions contained in this ITB that may be in variance or conflict with these General Conditions shall have precedence over these General Conditions. If no changes or deletions to General Conditions are made in the Special Conditions, then the General Conditions shall prevail in their entirety,

### PART III BIDDING AND AWARD PROCEDURES:

- 3.01 **SUBMISSION AND RECEIPT OF BIDS:** To receive consideration, bids must be received prior to the bid opening date and time. Unless otherwise specified, Bidder's should use the proposal forms provided by the City. These forms may be duplicated, but failure to use the forms may cause the bid to be rejected. Any erasures or corrections on the bid must be made in ink and initialed by Bidder in ink. All information submitted by the Bidder shall be printed, typewritten or filled in with pen and ink. Bids shall be signed in ink. Separate bids must be submitted for each ITB issued by the City in separate sealed envelopes properly marked. When a particular ITB or RFP requires multiple copies of bids or proposals they may be included in a single envelope or package properly sealed and identified. Only send bids via facsimile transmission (FAX) if the ITB specifically states that bids sent via FAX will be considered. If such a statement is not included in the ITB, bids sent via FAX will be rejected. Bids will be publicly opened in the Purchasing Office, or other designated area, in the presence of Bidder's, the public, and City staff. Bidders and the public are invited and encouraged to attend bid openings. Bids will be tabulated and made available for review by Bidder's and the public in accordance with applicable regulations.
- 3.02 **MODEL NUMBER CORRECTIONS:** If the model number for the make specified in this ITB is incorrect, or no longer available and replaced with an updated model with new specifications, the Bidder shall enter the correct model number on the bidder proposal page. In the case of an updated model with new specifications, Bidder shall provide adequate information to allow the City to determine if the model bid meets the City's requirements.
- 3.03 **PRICES QUOTED:** Deduct trade discounts, and quote firm net prices. Give both unit price and extended total. In the case of a discrepancy in computing the amount of the bid, the unit price quoted will govern. All prices quoted shall be F.O.B. destination, freight prepaid (Bidder pays and bears freight charges, Bidder owns goods in transit and files any claims), unless otherwise stated in Special Conditions. Each item must be bid separately. No attempt shall be made to tie any item or items contained in the ITB with any other business with the City.
- 3.04 **TAXES:** The City of Fort Lauderdale is exempt from Federal Excise and Florida Sales taxes on direct purchase of tangible property. Exemption number for Federal Excise taxes is 59-74-0111K, and State Sales tax exemption number is 16-03-196479-54C.
- 3.05 **WARRANTIES OF USAGE:** Any quantities listed in this ITB as estimated or projected are provided for tabulation and information purposes only. No warranty or guarantee of quantities is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.
- 3.06 **APPROVED EQUAL:** When the technical specifications call for a brand name, manufacturer, make, model, or vendor catalog number with acceptance of APPROVED EQUAL, it shall be for the purpose of establishing a level of quality and features desired and acceptable to the City. In such cases, the City will be receptive to any unit that would be considered by qualified City personnel as an approved equal. In that the specified make and model represent a level of quality and features desired by the City, the Bidder must state clearly in his bid any variance from those specifications. It is the Bidder's responsibility to provide adequate information, in his bid, to enable the City to ensure that the bid meets the required criteria. If adequate information is not submitted with the bid, it may be rejected. The City will be the sole judge in determining if the item bid qualifies as an approved equal.
- 3.07 **MINIMUM AND MANDATORY TECHNICAL SPECIFICATIONS:** The technical specifications may include items that are considered minimum, mandatory, or required. If any Bidder is unable to meet, or exceed these items, and feels that the technical specifications are overly restrictive, he must notify the Purchasing Division immediately. Such notification must be received by the Purchasing Division prior to the deadline contained in the ITB, for questions of a material nature, or prior to five (5) days before bid due and open date, whichever occurs first. If no such notification is received prior to that deadline, the City will consider the technical specifications to be acceptable to all bidders.
- 3.08 **MISTAKES:** Bidders are cautioned to examine all terms, conditions, specifications, drawings, exhibits, addenda, delivery instructions and special conditions pertaining to the ITB. Failure of the Bidder to examine all pertinent documents shall not entitle him to any relief from the conditions imposed in the contract.

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- 3.09 **SAMPLES AND DEMONSTRATIONS:** Samples or inspection of product may be requested to determine suitability. Unless otherwise specified in Special Conditions, samples shall be requested after the date of bid opening, and if requested should be received by the City within seven (7) working days of request. Samples, when requested, must be furnished free of expense to the City and if not used in testing or destroyed, will upon request of the Bidder, be returned within thirty (30) days of bid award at Bidder's expense. When required, the City may request full demonstrations of units prior to award. When such demonstrations are requested, the Bidder shall respond promptly and arrange a demonstration at a convenient location. Failure to provide samples or demonstrations as specified by the City may result in rejection of a bid.
- 3.10 **LIFE CYCLE COSTING:** If so specified in the ITB, the City may elect to evaluate equipment proposed on the basis of total cost of ownership. In using Life Cycle Costing, factors such as the following may be considered: estimated useful life, maintenance costs, cost of supplies, labor intensity, energy usage, environmental impact, and residual value. The City reserves the right to use those or other applicable criteria, in its sole opinion that will most accurately estimate total cost of use and ownership.
- 3.11 **BIDDING ITEMS WITH RECYCLED CONTENT:** In addressing environmental concerns, the City of Fort Lauderdale encourages Bidders to submit bids or alternate bids containing items with recycled content. When submitting bids containing items with recycled content, Bidder shall provide documentation adequate for the City to verify the recycled content. The City prefers packaging consisting of materials that are degradable or able to be recycled. When specifically stated in the ITB, the City may give preference to bids containing items manufactured with recycled material or packaging that is able to be recycled.
- 3.12 **USE OF OTHER GOVERNMENTAL CONTRACTS:** The City reserves the right to reject any part or all of any bids received and utilize other available governmental contracts, if such action is in its best interest.
- 3.13 **QUALIFICATIONS/INSPECTION:** Bids will only be considered from firms normally engaged in providing the types of commodities/services specified herein. The City reserves the right to inspect the Bidder's facilities, equipment, personnel, and organization at any time, or to take any other action necessary to determine Bidder's ability to perform. The Purchasing Manager reserves the right to reject bids where evidence or evaluation is determined to indicate inability to perform.
- 3.14 **BID SURETY:** If Special Conditions require a bid security, it shall be submitted in the amount stated. A bid security can be in the form of a bid bond, postal money order, cashiers check, or irrevocable letter of credit. Bid security will be returned to the unsuccessful bidders as soon as practicable after opening of bids. Bid security will be returned to the successful bidder after acceptance of the performance bond or irrevocable letter of credit, if required; acceptance of insurance coverage, if required; and full execution of contract documents, if required; and full execution of contract documents, if required; or conditions as stated in Special Conditions.
- 3.15 **PUBLIC RECORDS:** Florida law provides that municipal records shall at all times be open for personal inspection by any person. Section 119.01, F.S., The Public Records Law. Information and materials received by City in connection with an ITB response shall be deemed to be public records subject to public inspection upon award, recommendation for award, or 10 days after bid opening, whichever occurs first. However, certain exemptions to the public records law are statutorily provided for in Section 119.07, F.S. If the Proposer believes any of the information contained in his or her response is exempt from the Public Records Law, then the Proposer, must in his or her response, specifically identify the material which is deemed to be exempt and cite the legal authority for the exemption, otherwise, the City will treat all materials received as public records.
- 3.16 **PROHIBITION OF INTEREST:** No contract will be awarded to a bidding firm who has City elected officials, officers or employees affiliated with it, unless the bidding firm has fully complied with current Florida State Statutes and City Ordinances relating to this issue. Bidders must disclose any such affiliation. Failure to disclose any such affiliation will result in disqualification of the Bidder and removal of the Bidder from the City's bidder lists and prohibition from engaging in any business with the City.
- 3.17 **RESERVATIONS FOR AWARD AND REJECTION OF BIDS:** The City reserves the right to accept or reject any or all bids, part of bids, and to waive minor irregularities or variations to specifications contained in bids, and minor irregularities in the bidding process. The City also reserves the right to award the contract on a split order basis, lump sum basis, individual item basis, or such combination as shall best serve the interest of the City. The City reserves the right to make an award to the responsive and responsible bidder whose product or service meets the terms, conditions, and specifications of the ITB and whose bid is considered to best serve the City's interest. In determining the responsiveness of the offer and the responsibility of the Bidder, the following shall be considered when applicable: the ability, capacity and skill of the Bidder to perform as required; whether the Bidder can perform promptly, or within the time specified, without delay or interference; the character, integrity, reputation, judgment, experience and efficiency of the Bidder; the quality of past performance by the Bidder; the previous and existing compliance by the Bidder with related laws and ordinances; the sufficiency of the Bidder's financial resources; the availability, quality and adaptability of the Bidder's supplies or services to the required use; the ability of the Bidder to provide future maintenance, service or parts; the number and scope of conditions attached to the bid.
- If the ITB provides for a contract trial period, the City reserves the right, in the event the selected bidder does not perform satisfactorily, to award a trial period to the next ranked bidder or to award a contract to the next ranked bidder, if that bidder has successfully provided services to the City in the past. This procedure to continue until a bidder is selected or the contract is re-bid, at the sole option of the City.
- 3.18 **LEGAL REQUIREMENTS:** Applicable provisions of all federal, state, county laws, and local ordinances, rules and regulations, shall govern development, submittal and evaluation of all bids received in response hereto and shall govern any and all claims and disputes which may arise between person(s) submitting a bid response hereto and the City by and through its officers, employees and authorized representatives, or any other person, natural or otherwise; and lack of knowledge by any bidder shall not constitute a cognizable defense against the legal effect thereof.

## PART IV BONDS AND INSURANCE

- 4.01 **PERFORMANCE BOND/IRREVOCABLE LETTER OF CREDIT:** If a performance bond or irrevocable letter of credit is required in Special Conditions, the Contractor shall within fifteen (15) working days after notification of award, furnish to the City a Performance Bond or an Unconditional Irrevocable Letter of Credit payable to the City of Fort Lauderdale, Florida, in the face amount specified in Special Conditions as surety for faithful performance under the terms and conditions of the contract. If the

## Exhibit A

bond is on an annual coverage basis, renewal for each succeeding year shall be submitted to the City thirty (30) days prior to the termination date of the existing Performance Bond. A surety company of recognized standing, authorized to do business in the State of Florida and having a resident agent, must execute the Performance Bond. If a Letter of Credit is chosen, it must be in a form acceptable to the City, drawn on a local (Broward, Dade or Palm Beach Counties) bank acceptable to the City and issued in favor of the City of Fort Lauderdale, Florida. If a Bidder wishes to use a non-local bank, he must have prior City approval of the requirements to draw against the Letter of Credit.

Acknowledgement and agreement is given by both parties that the amount herein set for the Performance Bond or Irrevocable Letter of Credit is not intended to be nor shall be deemed to be in the nature of liquidated damages nor is it intended to limit the liability of the Contractor to the City in the event of a material breach of this Agreement by the Contractor.

- 4.02 **INSURANCE:** If the Contractor is required to go on to City property to perform work or services as a result of ITB award, the Contractor shall assume full responsibility and expense to obtain all necessary insurance as required by City or specified in Special Conditions.

The Contractor shall provide to the Purchasing Division original certificates of coverage and receive notification of approval of those certificates by the City's Risk Manager prior to engaging in any activities under this contract. The Contractor's insurance is subject to the approval of the City's Risk Manager. The certificates must list the City as an **ADDITIONAL INSURED** and shall have no less than thirty (30) days written notice of cancellation or material change. Further modification of the insurance requirements may be made at the sole discretion of the City's Risk Manager if circumstances change or adequate protection of the City is not presented. Bidder, by submitting his bid, agrees to abide by such modifications.

### PART V PURCHASE ORDER AND CONTRACT TERMS:

- 5.01 **COMPLIANCE TO SPECIFICATIONS, LATE DELIVERIES/PENALTIES:** Items offered may be tested for compliance to bid specifications. Items delivered which do not conform to bid specifications may be rejected and returned at Contractor's expense. Any violation resulting in contract termination for cause or delivery of items not conforming to specifications, or late delivery may also result in:
- Bidders name being removed from the City's bidder's mailing list for a specified period and Bidder will not be recommended for any award during that period.
  - All City Departments being advised to refrain from doing business with the Bidder.
  - All other remedies in law or equity.
- 5.02 **ACCEPTANCE, CONDITION, AND PACKAGING:** The material delivered in response to ITB award shall remain the property of the Seller until a physical inspection is made and the material accepted to the satisfaction of the City. The material must comply fully with the terms of the ITB, be of the required quality, new, and the latest model. All containers shall be suitable for storage and shipment by common carrier, and all prices shall include standard commercial packaging. The City will not accept substitutes of any kind. Any substitutes or material not meeting specifications will be returned at the Bidder's expense. Payment will be made only after City receipt and acceptance of materials or services.
- 5.03 **SAFETY STANDARDS:** All manufactured items and fabricated assemblies shall comply with applicable requirements of the Occupational Safety and Health Act of 1970 as amended, and be in compliance with Chapter 442, Florida Statutes. A completed Material Safety Data Sheet (MSDS) must accompany any toxic substance listed in Section 38F-41.03 of the Florida Administrative Code delivered as a result of this order.
- 5.04 **ASBESTOS STATEMENT:** All material supplied must be 100% asbestos free. Bidder, by virtue of bidding, certifies that if awarded any portion of the ITB he will supply only material or equipment that is 100% asbestos free.
- 5.05 **OTHER GOVERNMENTAL ENTITIES:** If the Bidder is awarded a contract as a result of this ITB, he will, if he has sufficient capacity or quantities available, provide to other governmental agencies, so requesting, the products or services awarded in accordance with the terms and conditions of the ITB and resulting contract. Prices shall be F.O.B. delivered to the requesting agency.
- 5.06 **VERBAL INSTRUCTIONS PROCEDURE:** No negotiations, decisions, or actions shall be initiated or executed by the Contractor as a result of any discussions with any City employee. Only those communications that are in writing from an authorized City representative may be considered. The City will recognize only written communications from Contractors, which are assigned by a person designated as authorized to bind the Contractor, as duly authorized expressions on behalf of Contractors.
- 5.07 **INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor under this Agreement. Personal services provided by the Proposer shall be by employees of the Contractor and subject to supervision by the Contractor, and not as officers, employees, or agents of the City. Personnel policies, tax responsibilities, social security, health insurance, employee benefits, purchasing policies unless otherwise stated in this ITB, and other similar administrative procedures applicable to services rendered under this contract shall be those of the Contractor.
- 5.08 **INDEMNITY/HOLD HARMLESS AGREEMENT:** The Contractor agrees to protect, defend, indemnify, and hold harmless the City of Fort Lauderdale and its officers, employees and agents from and against any and all losses, penalties, damages, settlements, claims, costs, charges for other expenses, or liabilities of every and any kind including attorney fees, in connection with or arising directly or indirectly out of the work agreed to or performed by Contractor under the terms of any agreement that may arise due to the bidding process. Without limiting the foregoing, any and all such claims, suits, or other actions relating to personal injury, death, damage to property, defects in materials or workmanship, actual or alleged violations of any applicable Statute, ordinance, administrative order, rule or regulation, or decree of any court shall be included in the indemnity hereunder.
- 5.09 **TERMINATION FOR CAUSE:** If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if the Contractor shall violate any of the provisions of this Agreement, the City may upon written notice to the Contractor terminate the right of the Contractor to proceed under this Agreement, or with such part or parts of the Agreement as to which there has been default, and may hold the Contractor liable for any damages caused to the City by reason of such default and termination. In the event of such termination, any completed services performed by the Contractor under this Agreement shall, at the option of the City, become the City's property and the Contractor shall be entitled to receive equitable compensation for any work completed to the satisfaction of the City. The Contractor, however, shall not be relieved of liability to the City for damages sustained by the City by reason of any breach of the

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Agreement by the Contractor, and the City may withhold any payments to the Contractor for the purpose of setoff until such time as the amount of damages due to the City from the Contractor can be determined.

- 5.10 **TERMINATION FOR CONVENIENCE:** The City reserves the right, in its best interest as determined by the City, to cancel contract by giving written notice to the Contractor thirty (30) days prior to the effective date of such cancellation.
- 5.11 **CANCELLATION FOR UNAPPROPRIATED FUNDS:** The obligation of the City for payment to a Contractor is limited to the availability of funds appropriated in a current fiscal period, and continuation of the contract into a subsequent fiscal period is subject to appropriation of funds, unless otherwise authorized by law.
- 5.12 **RECORDS/AUDIT:** The Contractor shall maintain during the term of the contract all books of account, reports and records in accordance with generally accepted accounting practices and standards for records directly related to this contract. The form of all records and reports shall be subject to the approval of the City's Internal Auditor. The Contractor agrees to make available to the City's Internal Auditor, during normal business hours and in Broward, Dade or Palm Beach Counties, all books of account, reports and records relating to this contract for the duration of the contract and retain them for a minimum period of one (1) year beyond the last day of the contract term.
- 5.13 **PERMITS, TAXES, LICENSES:** The successful Contractor shall, at his own expense, obtain all necessary permits, pay all licenses, fees and taxes, required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried on under this contract.
- 5.14 **LAWS/ORDINANCES:** The Contractor shall observe and comply with all Federal, state, local and municipal laws, ordinances rules and regulations that would apply to this contract.
- 5.15 **NON-DISCRIMINATION:** There shall be no discrimination as to race, sex, color, creed, age or national origin in the operations conducted under this contract.
- 5.16 **UNUSUAL CIRCUMSTANCES:** If during a contract term where costs to the City are to remain firm or adjustments are restricted by a percentage or CPI cap, unusual circumstances that could not have been foreseen by either party to the contract occur, and those circumstances significantly affect the Contractor's cost in providing the required items or services, then the Contractor may request adjustments to the costs to the City to reflect the changed circumstances. The circumstances must be beyond the control of the Contractor, and the requested adjustments must be fully documented. The City may, after examination, refuse to accept the adjusted costs if they are not properly documented, increases are considered to be excessive, or decreases are considered to be insufficient. In the event the City does not wish to accept the adjusted costs and the matter cannot be resolved to the satisfaction of the City, the City will reserve the following options:
1. The contract can be canceled by the City upon giving thirty (30) days written notice to the Contractor with no penalty to the City or Contractor. The Contractor shall fill all City requirements submitted to the Contractor until the termination date contained in the notice.
  2. The City requires the Contractor to continue to provide the items and services at the firm fixed (non-adjusted) cost until the termination of the contract term then in effect.
  3. If the City, in its interest and in its sole opinion, determines that the Contractor in a capricious manner attempted to use this section of the contract to relieve themselves of a legitimate obligation under the contract, and no unusual circumstances had occurred, the City reserves the right to take any and all action under law or equity. Such action shall include, but not be limited to, declaring the Contractor in default and disqualifying him for receiving any business from the City for a state period of time.
- If the City does agree to adjusted costs, these adjusted costs shall not be invoiced to the City until the Contractor receives notice in writing signed by a person authorized to bind the City in such matters.
- 5.17 **ELIGIBILITY:** If applicable, the Contractor must first register with the Department of State of the State of Florida, in accordance with Florida State Statutes, prior to entering into a contract with the City.
- 5.18 **PATENTS AND ROYALTIES:** The Contractor, without exception, shall indemnify and save harmless the City and its employees from liability of any nature and kind, including cost and expenses for or on account of any copyrighted, patented or un-patented invention, process, or article manufactured or used in the performance of the contract, including its use by the City. If the Contractor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the bid prices shall include all royalties or costs arising from the use of such design, device, or materials in any way involved in the work.
- 5.19 **ASSIGNMENT:** Contractor shall not transfer or assign the performance required by this ITB without the prior written consent of the City. Any award issued pursuant to this ITB, and the monies, which may become due hereunder, are not assignable except with the prior written approval of the City Manager or selected designee.
- 5.20 **LITIGATION VENUE:** The parties waive the privilege of venue and agree that all litigation between them in the state courts shall take place in Broward County, Florida and that all litigation between them in the federal courts shall take place in the Southern District in and for the State of Florida.

## City of Fort Lauderdale 2000-2005 Strategic Plan

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### HOUSING AND HOMELESS NEEDS ASSESSMENT

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This section describes the City's estimated housing needs and needs for supportive services projected for the ensuing five-year period. Housing data included in this portion of the CP is based on 1990 U.S. Census data, as well as data collected by the city from local studies, surveys of social services agencies, studies by local providers, and consultations with HIV/AIDS providers. HOPWA needs are identified for all of Broward County.

#### General Conditions

The City of Fort Lauderdale is a developed urban area, with very little vacant, buildable land available for residential development. According to census data during the decade between 1970-1980, the City of Fort Lauderdale's housing stock grew at an average rate of 2% per year. This trend stopped by 1980. According to the City's Comprehensive Planning Report prepared in December, 1987, during 1980-85 the City's population decreased by an average of 1.3% annually. The decline was expected to continue at that same rate until 1989, when the population would again begin to increase at the rate of .225% per year until the City achieved build-out. The increase in population was expected to be achieved by the institution of new policies which would permit higher density multi-family and mixed-use developments in and around the Central Business District. However, the anticipated increase did not materialize. The decline in population continued, according to the 1990 census population count, and remains constant with 1999 estimates at 148,971, based on official adjustments made by the Bureau of the Census through September 30, 1999. In fact, Fort Lauderdale ranks last in absolute population growth among local governments in the tri-county region, according to the South Florida Regional Planning Council.

Growth in the City has occurred, but the growth has been in jobs and employment, particularly in the downtown area. The City of Fort Lauderdale has a very active downtown employment center. According to the Downtown Development Authority (DDA), approximately 59,800 people work within a two-mile radius of the downtown. Of the total employed, 23.4% are employed in professional and managerial positions. Among the largest metropolitan areas in Florida, employment grew most rapidly in Fort Lauderdale. The average commute time for downtown workers is 23 minutes, which allows Fort Lauderdale to draw on eligible workers from the whole of Broward County.

The South Florida Regional Planning Council, which is the agency responsible for coordinating regional planning and growth for Dade, Broward and Monroe Counties, adopted the Strategic Regional Policy Plan (SRPP) in 1995. The SRPP states that the region has the potential to become one of the premier regions in the nation and the

## **Exhibit B**

world, but that an analysis of current conditions and future trends could inhibit that potential. Two of those conditions which affect Fort Lauderdale are the lack of a quality workforce, which threatens the area's ability to attract competitive employment, and the "persistent social and economic disparities among the Region's residents" (SRPP, p. 1). Moreover, the majority of jobs in the area are service-related jobs (52% in the downtown area alone, according to the DDA).

The federal funds provided by HUD give Fort Lauderdale the opportunity to address these concerns, through job training, the creation of jobs paying a living wage, and funding of child care subsidies to provide needed support to working lower-income families.

## **HOUSING ASSESSMENT**

The 1990 Census exhibits two major shifts in the City's housing stock: (1) a decline in the number of middle income families and the number of middle-range housing units; and (2) a decline in home ownership. From 1970-80, 7 of 11 middle class census tracts experienced a decline in the number of middle income families, and 3 census tracts experienced a decline in the number of middle range housing units. Also, in 1980, approximately 58% of the housing stock was owner-occupied. By 1990, the number of middle income census tracts had dropped to 10, and the percentage of homeowners to 54%. According to the City's Comprehensive Plan 1.2% of single-family units have been lost since 1980 while multi-family units have increased by 10.5%.

As part of its comprehensive planning efforts, the City undertook an extensive study of its northwest quadrant in 1989, which found that for that sector of the City, approximately 25% of the area was vacant, residential parcels. This condition was verified again during the slum and blight study undertaken to establish the Community Redevelopment Area (CRA) in the central part of the City, and recent observations by the Community Area Planning (CAP) staff confirm the vacant and underutilized land uses. The 1999 CAP report shows 1,520 vacant properties in the Central Planning Area, which includes the entire area previously studied.

The Safe Neighborhood Study also found that approximately 25% of all the structures in the NW quadrant were substandard. This study was updated by the City's 1995 Neighborhood Conditions Study (NCS) to establish the slum and blight criteria for the CRA.

The NCS found that 73% of all structures were found to evidence varying degrees of disrepair with 28.5% rated deteriorating or dilapidated, requiring major rehabilitation or demolition. According to the 1990 U.S. Census, there are over 9,400 structures in the northwest quadrant. If 28.5% of them are substandard, that represents 2,679 units which need either rehabilitation or demolition and replacement. If the City were to try to meet this need over the next 5 years, 536 units per year would need to be either rehabilitated or replaced. Unfortunately, the federal and state housing funds available

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to the City are not sufficient to meet this need. Moreover, two of the other three quadrants of the City are experiencing slight to moderate decline, and contain structures which need assistance. In the ten years since the Safe Neighborhood Study, the City has demolished many of the substandard structures, creating additional vacant properties. However, there are still many structures which need to be boarded-up or demolished, and where possible, replaced.

**General Housing Needs**

General housing needs are measured by assessing the number of extremely low-, very low- and low-income households who: (1) live in substandard units; (2) live in overcrowded units; or (3) pay more than 30% of their income for housing. No moderate-income housing needs have been identified, since existing funding is not sufficient to meet the identified needs of lower-income households.

The U.S. Census and HUD use the following standards to define housing need:

1. substandard - units lacking complete bathroom facilities for exclusive use.
2. overcrowded - units containing 1.01 or more persons per room.
3. cost burdened - households paying more than 30% of their income for housing, including utilities.

A detailed description of rental and owner-occupied housing is provided in the following sections on rental and homeowner needs.

**Quality of Structures**

The only measure of condition of units available in the U.S. Census is the information provided on units lacking some or all plumbing facilities. Using this standard, the 1990 Census reports a total of 472 such units for the City, located in 299 rental, 85 owner-occupied, and 88 vacant structures. These units are located in 18 census tracts throughout the City, however 49% of all such units are located in 4 tracts: 408 - 60 units; 415 - 57 units; 471 - 65 units; and 420 - 51 units. If it is assumed that this factor is a true measure of the need for rehabilitation of structures, then it would be conceivable that the City could rehabilitate 420 structures in a five year period. However, while the lack of adequate plumbing facilities is one factor that may be considered, it is not a true or complete measure of housing conditions.

**Rental Needs**

Table A illustrates 1,595 low- and moderate-income renters who are living in either overcrowded or substandard conditions. A total of 319 standard units would need to be added to the City's rental housing stock every year for five years in order to meet this need. While this level of assistance is not possible with current federal funding levels, the City must continue to rehabilitate rental units and encourage the development of

**Exhibit B**

new affordable units for both renters and new homeowners in order to increase this supply. This requires active partnerships between the City and the private sector.

**TABLE A  
HOUSING ASSISTANCE NEEDS OF LOW- AND MODERATE- INCOME  
RENTER HOUSEHOLDS**

Household by Type, Income and Housing Problem	Elderly 1 and 2-person Households	Small Family (2-4 persons)	Large Family (5 or more persons)	All Other Households	Total Renters
0-30% Median Family Income	1,653	1,617	727	1,856	5,853
% with any housing problem	68%	79%	97%	75%	77%
% cost burden greater than 30%	68%	76%	76%	72%	73%
% cost burden greater than 50%	52%	65%	63%	68%	62%
31-50% Median Family Income	938	1,456	421	1,860	4,675
% with any housing problem	84%	87%	100%	95%	91%
% cost burden greater than 30%	84%	83%	61%	94%	86%
% cost burden greater than 50%	48%	26%	7%	51%	39%
51-80% Median Family Income	924	1,944	474	3,316	6,658
% with any housing problem	62%	57%	89%	66%	64%
% cost burden greater than 30%	53%	38%	15%	62%	51%
% cost burden greater than 50%	8%	4%	2%	7%	6%
81-95% Median Family Income	212	711	180	1,430	2,533
% with any housing problem	32%	37%	69%	35%	38%
% cost burden greater than 30%	32%	20%	3%	33%	27%
% cost burden greater than 50%	0%	0%	3%	1%	1%
Total Households	4,654	8,361	2,157	13,554	28,726
% with any housing problem	58%	51%	89%	47%	53%

According to 1990 Census data, the lower-income rental housing need in the City is estimated to be 13,033 households, as shown on Table A, which lists estimated total rental needs by elderly households and by family size. This table illustrates that the overwhelming category of rental need is from households paying more than 30% of their income for rent.

**Exhibit B**

The 1990 Census shows 3,515 (76%) of the 4,654 elderly renter households have incomes at or below 80% of the area median income. Table A identifies 2,485 low-income elderly renter households with housing problems. However, 97% of those households are paying more than 30% of their income for rent.

For small families, 5,017 (60%) of the 8,361 households have incomes at or below 80% of the area median. Table A identifies 3,652 low-income small family renter households with housing problems. Of these, 3,177 (87%) are paying more than 30% of their income for rent.

For large family renter households, 1,622 (75%) of the 2,157 households have incomes at or below 80% of the area median. Table A identifies 1,548 large family households with housing problems. Of these, 881 (57%) are paying more than 30% of their income for rent.

For all other renter households, 52% of the 13,554 households have incomes at or below the median income. Table A identifies 5,348 low-income unrelated households with housing problems. Of these, 5,140 (96%) are paying more than 30% of their income for rent.

Therefore, of the 13,033 total low-income households with housing problems, 11,600 (89%) are paying too much for housing and need assistance in paying rent or the creation of more affordable rental units. A total of 1,433 low-income renter households are living in overcrowded conditions or substandard units. These households need additional affordable larger units or standard units.

Extremely low-income renters pay much more of their income for housing. According to the 1990 Census, 20% of all renters earned less than 30% of the area median, with 73% paying more than 30% of their income for rent. The median rent paid in 1990 was \$486, with more than 43% of renter households paying more than 30% of their income for rent. Among renter households earning less than \$12,930 (30% of the 1990 area median income), 62% paid more than 50% of their income for rent, showing a strong need for standard, affordable rental units for extremely low-income households.

In an attempt to update the 1990 Census figures for median rent paid, two additional sources were consulted: a report prepared by the Broward County Property Appraiser's Office and a Point in Time Survey of rental units available in the city and advertised in the Sun Sentinel newspaper. The property appraiser's report, prepared by the Broward County Property Appraiser, Department of Income Evaluation, the "Income Expense Analysis Survey (IEAS), January 1, 1997, shows the mean 1997 rents for the city to be: \$586 for an efficiency; \$636 for a one-bedroom; \$787 for a two-bedroom; and \$852 for a three-bedroom units. These rents exclude the beach area, using the Intracoastal Waterway as the eastern boundary, since the mean could be distorted due to the high rents charged for beach units.

**Exhibit B**

The Point in Time survey, conducted May 25, 2000, found: 6 efficiencies with an average rent of \$469; 12 one-bedrooms with an average rent of \$568; 14 two-bedrooms with an average rent of \$717; and 2 three-bedrooms with an average rent of \$885. The survey included all units available for rent and advertised in the Sun Sentinel on that day. No four-bedroom units were advertised for rent.

**Availability of Affordable Rental Units**

The survey illustrates the lack of affordable three- and four-bedroom rental units in the city. The 1990 Census lists 30,296 renter-occupied units. Only 47 (0.15%) are 5 or more bedrooms; 158 (.05%) are 4 bedrooms; 2,082 (6.9%) are 3 bedrooms. Therefore, only 7.5% (2,287) of all private rental units are 3 or more bedrooms. In addition to these units, the Housing Authority of the City of Fort Lauderdale operates 22 five-bedroom units, located at the following sites: Sunnyland Homes - 10 units; Suncrest Court - 8 units; and Sistrunk Gardens - 4 units. The Housing Authority also operates 56 four-bedroom units at the following locations: Sunnyland Homes - 20; Suncrest Court - 16; Lakeview Gardens - 13; and Sistrunk Gardens - 7. The Housing Authority's large family units are continuously occupied, with a long waiting list in case one of them may become vacant. Affordable rental housing for large families remains a critical need in the City.

**Affordability of Rental Units**

Affordability is defined as a household paying no more than 30% of its gross income for rent and utilities. The following table displays affordable housing guidelines by income levels and family size, based upon the current area median income of \$54,500.

**TABLE B  
CITY OF FORT LAUDERDALE  
AFFORDABLE HOUSING GUIDELINES FOR RENTAL HOUSEHOLDS  
REPRESENTING 30% OF INCOME BY FAMILY SIZE  
BASED ON INCOME GUIDELINES OF MARCH, 2000**

Family Size	Extremely Low-Income, 30% of Median	30% of Income, Monthly Housing Costs	Very Low-Income, 50% of Median	30% of Income, Monthly Housing Costs	Low-Income, 80% of Median	30% of Income, Monthly Housing Costs
1	\$ 11,450	\$ 286	\$ 19,100	\$ 478	\$ 30,500	\$ 763
2	\$ 13,100	\$ 328	\$ 21,800	\$ 545	\$ 34,900	\$ 873
3	\$ 14,700	\$ 368	\$ 24,550	\$ 614	\$ 39,250	\$ 981

**Exhibit B**

Family Size	Extremely Low-Income, 30% of Median	30% of Income, Monthly Housing Costs	Very Low-Income, 50% of Median	30% of Income, Monthly Housing Costs	Low-Income, 80% of Median	30% of Income, Monthly Housing Costs
4	\$ 16,350	\$ 409	\$ 27,250	\$ 681	\$ 43,600	\$ 1,090
5	\$ 17,650	\$ 441	\$ 29,450	\$ 736	\$ 47,100	\$ 1,178
6	\$ 18,950	\$ 474	\$ 31,600	\$ 790	\$ 50,550	\$ 1,264
7	\$ 20,250	\$ 506	\$ 33,800	\$ 845	\$ 54,050	\$ 1,351
8	\$ 21,600	\$ 540	\$ 35,950	\$ 899	\$ 57,550	\$ 1,439

\*Income figures are adjusted annually by the U.S. Department of Housing and Urban Development. The HUD-established median income for the Fort Lauderdale/Hollywood area for 2000 is \$54,500.

As shown in the Table above, extremely low-income households, regardless of family size, could not afford standard housing units in Fort Lauderdale. One-, two-, three-, four-, and five-person households are priced out of the efficiency market. A six-, seven-, or eight person household could afford the average efficiency, but would be living in extremely crowded housing conditions, and in violation of local housing codes.

Very low-, and low-income households can afford to rent in the Fort Lauderdale housing market, if the average rents shown in the Point in Time Housing Survey are indicative of the housing market. However, there is a shortage of such units. Additional affordable rental units, as well as increased homeownership opportunities are needed to address this problem.

There is also a shortage of affordable rental units with three or more bedrooms. The following Table shows the distribution and cost of three-, four- and five-bedroom units, based on information in the 1990 U.S. Census.

**Table C  
Occupied Rental Units by  
Bedroom Size and Rent Range**

Census Tract	3 BR	4 BR	5 BR	Total	Rent less than \$200	Rent \$200-299	Rent \$300-499	Rent \$500-749	Rent \$750-999	Rent \$1000 or more
402.01	16	0	0	16	0	0	0	0	0	16
402.02	66	9	10	85	0	0	10	14	13	29
403	35	0	0	35	0	0	0	0	12	13
404	38	3	10	51	10	0	0	15	13	10

**Exhibit B**

Census Tract	3 BR	4 BR	5 BR	Total	Rent less than \$200	Rent \$200-299	Rent \$300-499	Rent \$500-749	Rent \$750-999	Rent \$1000 or more
405.01	37	0	0	37	0	0	0	13	0	15
405.02	0	10	0	10	0	0	0	0	0	0
406	19	9	0	28	0	0	0	0	19	9
407	96	28	0	124	0	0	0	56	41	15
408	234	0	12	246	0	0	0	186	33	10
409	155	5	0	160	0	0	10	125	25	0
410	30	0	0	30	0	7	14	9	0	0
414	71	0	0	71	15	14	0	42	0	0
415	43	5	0	48	0	26	22	0	0	0
416	131	4	0	135	32	30	35	13	0	0
417	59	0	0	59	0	0	30	29	0	0
418	82	13	5	100	0	0	0	20	34	46
419	42	0	0	42	0	0	0	23	0	19
420	34	7	0	41	0	0	0	0	0	29
421	9	0	0	9	0	0	0	0	0	9
422	22	10	10	42	0	0	0	0	0	28
423	66	9	0	75	0	0	0	23	0	45
424	19	0	0	19	0	0	0	23	0	15
425	47	0	0	47	0	0	0	22	25	0
426	29	13	0	42	6	0	8	20	8	0
427	33	5	0	38	0	0	0	9	18	6
428	125	0	0	125	0	8	26	76	15	0
429	8	0	0	8	0	0	0	8	0	0
430	124	21	0	145	0	0	7	88	39	8
431	135	0	0	135	0	0	0	19	83	19
432	30	0	0	30	0	0	23	7	0	0
433	173	0	0	173	0	0	10	60	69	23
501	16	0	0	16	0	0	0	16	0	0
502.01	58	7	0	65	0	0	0	9	0	56
Total	2082	158	47	2287	63	85	195	925	447	420

## Exhibit B

As seen above, approximately one-half of the three- or more bedroom units are affordable to very low- and low-income households and are located throughout the City. However, these units are occupied and do not go towards meeting the need for additional rental housing. In fact, 183 of the 2,082 three-bedroom units are operated by the Housing Authority; of the four-bedroom units, the Housing Authority operates 56 (35% of the total number of such units); and of the five-bedroom units, the Housing Authority operates 22 (47% of the total number of such units). More than 10% of occupied 3-, 4-, and 5-bedroom units are occupied by public housing residents. While it is not possible to determine from the Census data which units are the most affordable, it is probably safe to assume that all 148 units renting for less than \$300 are public housing units, as well as 113 (58%) of the units renting for \$300-499. This data underlines the need for affordable rental units for large households.

The IEAS for 1992 shows the average 1992 vacancy rate for rental apartments in the area including the City to be 4.98%, well below the 1990 Census rate of 11.5%. The vacancy rate in the City is currently very low, and has been low, due to the extraordinary need for rental housing caused by Hurricane Andrew. It was anticipated that as units are repaired and rebuilt in Miami-Dade County, the vacancy in Broward County would increase. However, this anticipated increase in rental vacancies has not occurred. According to the 1998 IEAS, the current vacancy rate for this area is 4.73% as of January, 1998, so the need for additional affordable housing units remains strong.

### Homeowner Needs

Homeowner needs in the City must be evaluated on a different basis from those of renters. According to the 1990 Census, 43% of the 14,906 elderly homeowners have incomes at or below 80% of the area median. Table D identifies 2,847 low-income elderly homeowners with housing problems. However, 100% of these households are paying more than 30% of their income for their mortgage. For all other owners, 27% have incomes at or below 80% of the area median income. Table D also identifies 1,194 homeowners with housing problems. Of these, 99% are paying more than 30% of their incomes for their mortgage. While there are not federal programs to reduce the mortgage costs for lower-income homeowners, there are programs to assist them in maintaining their homes in standard condition. These homeowners are very much in need of such assistance since much of their income goes towards the payment of mortgage, utilities, insurance and taxes, leaving very little, if any, money for repairs.

**Table D**  
**Housing Assistance Needs of Low and Moderate-Income**  
**Owner-Occupied Households**

Household by Type, Income and Housing Problem	Elderly Homeowners	All other Homeowners	Total Homeowners	Total Households

**Exhibit B**

Household by Type, Income and Housing Problem	Elderly Homeowners	All other Homeowners	Total Homeowners	Total Households
0-30% of Median Family Income	2,016	666	3,538	9,391
% with any housing problems	65%	56%	64%	72%
% cost burden greater than 30% of income	65%	55%	61%	68%
% cost burden greater than 50% of income	42%	48%	46%	56%
31-50% of Median Family Income	1,723	465	3,077	7,752
% with any housing problems	47%	80%	61%	79%
% cost burden greater than 30% of income	47%	80%	59%	75%
% cost burden greater than 50% of income	26%	56%	34%	37%
51-80% of Median Family Income	2,639	771	5,236	11,894
% with any housing problems	28%	58%	44%	55%
% with cost burden greater than 30% of income	28%	58%	40%	45%
% with cost burden greater than 50% of income	8%	32%	15%	10%
81-95% Median Family Income	1,126	524	2,735	5,268
% with any housing problems	19%	55%	37%	37%
% cost burden greater than 30% of income	19%	54%	32%	30%
% cost burden greater than 50% of income	6%	15%	8%	5%
Total Households	14,906	7,081	37,686	66,412
% with any housing problems	24%	34%	30%	40%

While some low-income homeowners may have housing needs, extremely low- and very low-income homeowners have the greatest needs. According to the 1990 Census, 3,538 (9.4%) of the City's homeowners earned less than 30% of the median income for the area, with 2,171 (62%) paying more than 30% of their income for housing, and 1,627 (46%) paying more than 50% of their income for housing. In fact, 2,666 (40%) of the city's very low-income homeowners pay more than 50% of their income for housing. A total of 1,618 of these homeowners (61%) earn less than 30% of the area median income. The current median for this area is \$54,500, according to the U.S. Department of Housing and Urban Development. Therefore, 30% of the median is only \$16,350. If 1,618 homeowners earning less than \$16,350 are paying 50% or more of their income for housing, then at a maximum, these households are left with only \$681 per month for all other non-housing expenses. Clearly, it would be very difficult for homeowners in this category to manage to finance even routine maintenance and repairs for their homes, either through savings or bank financing. There is clearly a need for subsidized rehabilitation assistance for homeowners in this category. It is reasonable to assume that a high level of these units would need rehabilitation assistance, but even if we assume only 50% of these units need repairs, the City does not receive enough Federal and State resources to address this need. If it is estimated that 800 extremely low-

## **Exhibit B**

income homeowners, at an average rehabilitation cost of \$25,000 per unit, it would cost the City over \$20 million to complete such repairs. The City only receives 10% of that amount per year for housing from the Federal and State government, so if all of these funds were spent on owner-occupied rehabilitation, it would take 20 years to address this need.

While the 1990 Census shows only 85 owner-occupied units lacking some or all plumbing facilities, this factor is only one measure of decent, safe and sanitary housing. The City's previous Housing Assistance Plan estimated that there were 5,037 substandard units in the City, of which 4,029 units are suitable for rehabilitation. This was based on the assumption that the definition of substandard units includes units that have major code violations. In order to estimate what portion of the housing stock is substandard, HD recommended, in Housing Assistance Plan Instructions in April, 1983, the use of a substandard factor of 3.35% for owner-occupied housing, and a substandard factor of 12.44% for renter-occupied housing. Using these factors, the number of owner-occupied substandard units is 1,211 and renter-occupied units, 3,769. If we assume that approximately 80% of the substandard units are suitable for rehabilitation or 3,984 units, then if the City repairs 40 such homes annually, it would take 100 years to complete this work.

Realistically, many of these units will be or have been demolished due to dilapidated conditions. The City does have a program to replace these units, but it is only possible to replace 10-15 owner-occupied units per year, due to the high cost of replacement. In addition, the demolition of units creates the need and opportunity for the development of infill single-family units on a scattered site basis, creating homeownership opportunities for lower-income first time homebuyers and increasing the affordable housing stock.

There is a large need for affordable for-sale houses in the City, to meet the affordable housing needs of lower-income households, particularly large households. It is much cheaper for a lower-income large family to own a home rather than rent a home, particularly if purchase assistance is provided to the homebuyer. The current median income for the Fort Lauderdale area, established by HUD in March, 2000, is \$54,500. This places the income limits for very low-income 4 persons households (50% or less of the area median) at \$27,250 and low-income (80% or less of the area median) at \$43,600. Affordable for-sale housing is defined as paying no more than 30-35% of gross income for principal, interest, taxes and insurance (although, at no time is this definition meant to limit the ability of a lower-income household to pay more than those ratios, if approved for such financing by a lender giving the first mortgage). Based on the above income limits, the average affordable monthly mortgage payment, including taxes and insurance, could not exceed \$795 for very low-income households and \$1,272 for low-income households. The HUD Mortgage Limits for HUD-funded programs in the City are \$128,155. The Point in Time Survey taken on May 25, 2000 found for the Fort Lauderdale area, 325 single-family homes for sale in the multiple listing service at or below this price, with the average sales price of \$86,539. Taxes

**Exhibit B**

and insurance are assumed to cost \$200 per month, leaving payment levels for principal and interest at \$595 to \$1,072 respectively. Assuming a 30-year fixed rate mortgage, at 8.65%, housing in the upper range of \$75,000 to \$137,500 should be affordable to those in the upper ranges of the very low- and low-income categories.

While homeownership should be affordable to lower-income households, there are few such households who can save enough to pay for downpayment and closing costs. If homeownership is to become a reality for lower-income households, assistance will be needed for closing costs and down payments for both new and existing standard homes, and incentives must be provided to induce the construction of new affordable single-family homes throughout the City.

Finally, both renters and homeowners need assistance in learning how to maintain their homes. Lack of early detection of maintenance/repair needs and knowledge of how to make basic repairs and undertake routine maintenance, can cause many units to need costly repairs or to become standard. Home maintenance training would help these households to maintain their units and to be able to detect repair needs and perform minor repairs rather than allowing conditions to further deteriorate.

**Elderly Housing Needs**

Elderly households, whether they are renters or homeowners, have special housing needs. Many elderly renters are lower income and need affordable rental units. Additionally, many elderly homeowners on fixed incomes cannot afford to repair their homes, as previously discussed. Based on this information, it can be concluded that there is a strong need for elderly owner-occupied rehabilitation programs within the City. Seventy-six percent (76%) of all elderly-occupied housing units in the City are owner-occupied, representing 14,906 units. Within these units, 9,086 (34%) of elderly householders live alone, depending on a single income to pay for day-to-day living expenses, as well as housing maintenance costs. Table A shows 2,847 low-income elderly homeowners with housing problems. All of these households are identified as paying more than 30% of their income for their mortgage, leaving little, if any, money for housing repairs. An aggressive homeowner rehabilitation program is required to address this problem.

**Minority Housing Needs**

Minorities also have special housing needs. The northwest section of the City has maintained a predominantly Black resident population for decades. In fact, the City's first charter in 1925 established this pattern by setting aside for Black residents the northwest quadrant, bounded by Andrews Avenue and Broward Boulevard, and prohibiting any "Negro" from being over in any of the other three quadrants after 9:00 p.m. The Census Tracts located in the northwest quadrant are still predominantly

**Exhibit B**

Black: 409 - 86%; 410 - 99%; 414 - 90%; 415 - 99%; and 416 - 96%. While minorities do now live in the other three quadrants, the concentration of racial minorities in the northwest quadrant is made more significant by the fact that this quadrant also has the lowest median income and per capita income households in the City. While the 1990 City median income is listed as \$34,763 in the 1990 U.S. Census, the median income for the northwest tracts ranges from \$9-12,000. While the 1990 Census shows 17.1% of all persons in Fort Lauderdale have incomes below the poverty level, the northwest tracts have levels between 24-58% of all persons. Clearly, minorities in the northwest quadrant compose the majority of housing need in the City for both renters and homeowners.

Low income levels and lack of homeownership are two factors which are found in neighborhoods experiencing instability and decline. There is a very low percentage of homeowners in the northwest quadrant. The Table included at the end of this section illustrates homeownership by race and housing value for each census tract in the City, based on 1990 Census data. Nearly all of the houses for sale in the price range affordable to lower income families are located in the northwest quadrant. The 1989 Safe Neighborhoods Study found that 25% of the housing units in the northwest quadrant were substandard, which represents over 2,300 which need rehabilitation or demolition and replacement. If 80% of the units can be rehabilitated, then the minority housing for housing repairs is estimated to be over 1,800 units.

In order to overcome disparity and have strong, viable, diverse and healthy neighborhoods, the City needs to develop strategies to try to encourage racial and economic diversity in all of its sectors. This can be achieved by bringing higher incomes into lower income areas, through redevelopment which includes well-designed structures, with landscaping, amenities and design features that make the housing attractive to higher income persons. The City's Dorsey Heights program, which constructed 35 new single-family homes in an area of the northwest near downtown, used these ideas and has successfully attracted a few middle income families back to the neighborhood. Using this program as well as other public/private partnerships, the City has constructed 100 new homes in the northwest quadrant in the past five years. While much more work needs to be done to stabilize these neighborhoods, an aggressive infill housing program has will do much to create stable, attractive and safe neighborhoods for the northwest residents.

City View was also an attempt to achieve income diversity through design. The City Commission mandated that no more than 51% of the new townhomes should be occupied by lower-income households, in order to create economic diversity in the project. This income mix has been successfully achieved.

A third strategy being employed is to develop a transitional area, such as the N.E. Progresso area, using a mixed use or urban village concept, to attract income and racial diversity because of the life-style that may be provided by such a development. Any

## **Exhibit B**

new housing development in the City should offer a range of housing opportunities that are affordable to a broad range of individuals.

### **Other Special Needs**

Estimates of housing needs for residents with special housing needs have been obtained from a survey of local social service providers. The City conducted a survey in April, 2000 of 100 social service agencies serving Fort Lauderdale residents. Responses were received from 38 providers and revealed three clear priorities: permanent and transitional housing for persons with disabilities and homeless families; subsidized child care; and transportation for lower-income households. A copy of the survey and the survey results and raw data are included in Appendix A.

The Center for Independent Living, a non-profit organization that assists persons with disabilities to attain or remain independent in their community, submitted the following needs for the disabled in our community:

- increase the inventory of affordable, accessible housing
- increase funds for architectural barrier removal
- create/expand a first time homebuyer's program
- insure that funds are available for a rental assistance program
- create a task force which includes persons with disabilities to advise in planning and oversight.

### **HIV/AIDS Special Housing Needs**

The application for funding under the Housing Opportunities for Persons with Aids (HOPWA) program is being submitted by the City of Fort Lauderdale, Florida because it is the most populous municipal government in Broward County. Broward County is one of the sixteen original Ryan White Title I recipients. The City of Fort Lauderdale, through an Intergovernmental Agreement, designated Broward County to administer its HOPWA funds for the 1993-94, 94-95 and 95-96 program years. The City took over administration of the program for the 1996-97 program year and continues to operate it using City staff and non-profit providers.

According to the Broward County Health Department, AIDS Surveillance Office, Broward County has consistently ranked second only to Miami-Dade County in the number of AIDS cases in Florida. Its high AIDS incidence rate (65.8 per 100,000) places it third in the nation among metropolitan areas with a population of 500,000 or more. Since the onset of case reporting in 1981, Broward has accounted for 16% of the AIDS cases reported in Florida and about 1.6% of all cases nationwide. A cumulative total of 12,126 cases of AIDS had been reported in Broward County through December 31, 1999. Of these, more than half (56%) have died.

## **Exhibit B**

Throughout the 1980's and early 1990's, the AIDS epidemic was characterized by skyrocketing incidence rates and high mortality. Fortunately, the discovery of combination antiretroviral therapy in 1994 and protease inhibitors in 1995 marked a turning point and offered new hope for people living with HIV or AIDS. The incidence of AIDS cases peaked in 1994, when more than 1,500 new cases were reported in Broward County. AIDS-related deaths dropped for the first time in 1996, and have continued to decrease each year since. As a result, longer survival rates have contributed to an overall increase in the prevalence of AIDS. By the end of 1999, an estimated 5,159 people were living with AIDS in Broward County -- an 8% increase over the previous year, and up by more than 20% since 1997.

Although incidence rates have been decreasing, the slowing rate of decline may indicate that much of the benefit from new therapies has already been realized. The number of new AIDS cases remains significant, which suggests that not all segments of the population have access to, or are benefitting from, the new combination therapies. During 1998 and 1999, an estimated 1,762 adults and adolescents -- and 15 children, were diagnosed with AIDS in Broward County.

AIDS case reporting has provided important information about the demographics of the epidemic. However, since the median time from HIV infection to symptomatic AIDS is about ten years, the tracking of AIDS incidence (i.e., number of new cases per year) reflects infection patterns that are at least a decade old. As more effective treatments have helped delay the progression of HIV infection to AIDS for many people, the analysis of trends among people diagnosed with AIDS has ceased to reliably reflect the emerging characteristics of the HIV epidemic. Therefore, HIV prevalence (i.e., the total number of living, HIV-infected persons) is not considered more indicative of recent trends in HIV transmission, and a more accurate measure of the number of people needing care and services. The State of Florida initiated HIV case reporting in July, 1997. During the first two and one-half years since, a total of 2,349 new HIV cases were identified in Broward County.

According to the Centers for Disease Control and Prevention (CDC), the estimated prevalence of HIV infection in the United States ranges from 650,000 to 900,000 people. By applying the 1.6% proportion of AIDS cases reported to date in Broward County, the CDC assumes that between 10,400 and 14,400 people in this EMA know they are carrying the virus. By adjusting for this remaining portion, we estimate that HIV prevalence in Broward County ranges from 15,600 to 21,600 people. The mid-range point estimate is 18,600 people. This translates into about 1.2% of the County's overall population.

Approximately 1,800 new AIDS and HIV cases were registered by local surveillance during 1999. If this trend persists, and medical treatments continue to lengthen life expectancy, the number of people living with HIV/AIDS in Broward County will continue to grow. Using a combination of statistical models, local epidemiologist project that, at a minimum, demand for HIV/AIDS services will double within the next five years.

## **Exhibit B**

The year 2000 needs assessment for Broward County identifies housing assistance as the number 2 unmet need among persons with HIV/AIDS, and housing problems as the number 2 barrier to needed care.

### **Affordable Housing Needs**

The Year 2000 survey of housing, economic, social service and community development needs undertaken by the City's Community Development Division identified the following housing needs:

- more affordable housing for both renters and special needs populations and families
- more homeownership opportunities
- more handicapped accessible housing
- housing repairs, both rental and owner-occupied
- infill housing on vacant residential lots

The greatest affordable housing need in the City is for affordable units for very low-income large families. There is a shortage of units with 4 or more bedrooms and most of the existing units are seasonal rentals in high rent areas. However, all very low-income households have affordable housing needs. Even a very low-income one person household could not afford the average-priced efficiency in the City, priced at \$450. The current HUD-approved Fair market rent for the Fort Lauderdale metropolitan area is \$486 for an efficiency.) The need for affordable rental units for extremely low-income households is a top priority for assistance. However, developing this type of unit requires deep public subsidies, since the level of rents affordable to this income group will not support private sector investments in rental property. Gross rents would not cover debt and operating expenses.

There is also a need for subsidized rehabilitation assistance to homeowners, as well as a need for affordable for-sale housing. While some low-income homeowners may have housing needs, extremely low- and very low-income homeowners have the greatest needs. According to the 1990 Census, 3,538 (9.4%) of the City's homeowners earned less than 30% of the median income, with 2,171 (62%) paying more than 30% of their income for housing, and 1627 (46%) paying more than 50% of their income for housing. In fact, 2,666 (40%) of the City's very low-income homeowners pay more than 50% of their income for housing. A total of 1,618 of these homeowners (61%) earn less than 30% of the area median. The current median income for this area is \$43,100, according to the U.S. Department of Housing and Urban Development. Therefore, 30% of the median is \$12,930. If 1,618 homeowners earning less than \$12,930 are paying 50% or more of their income for housing, then at a maximum, these households are left with only \$513 per month for all other non-housing expenses. Clearly, it would be very difficult for homeowners in this category to manage to finance even routine maintenance and repairs for their homes, either through savings or bank financing. There is clearly a

## **Exhibit B**

need for subsidized rehabilitation assistance for homeowners in this category. It is reasonable to assume that a high level of these units would need rehabilitation assistance, but even if we assume only 50% need repairs, there are not enough federal and state resources to address this need. If the City were to try to address this need over a 5 year period, 162 units would have to be rehabilitated each year.

There is also a need for affordable for-sale houses in the City. The current median income for the Ft. Lauderdale area, established by HUD in March, 2000, is \$54,500. This places the income limits for very low-income 4 person households (50% or less of area median) at \$27,250 and low-income (80% or less of median) at \$43,600. Affordable for-sale housing is usually understood to mean paying no more than 30-35% of gross income for principal, interest, taxes and insurance. Based on the above income limits, the average affordable monthly mortgage payment, including utilities, taxes and insurance, could not exceed \$681 to \$795 for very low-income households and \$1,090 to \$1,272 for low-income households. Assuming \$200 per month for taxes and insurance, this would allow a very low income household to obtain a 30-year, 8.65% interest mortgage of \$61,700 to \$76,000, and a low-income household, a mortgage of \$114,200 to \$137,500. These figures make the development of new single family housing a viable option in the Fort Lauderdale housing market even for very low-income households, since subsidies are available for downpayment assistance to reduce the initial housing cost.

## **Homeless Needs**

In a page published by the Sun Sentinel at <http://www.geocities.com/ftlaudhomeless/SunSentinel/homelessstats.html>, the following demographic information is provided, taken from data provided by the Broward Coalition for the Homeless; the Broward County Bureau of children and Family Services Homeless Outreach Program; and the National Coalition for the Homeless. In Broward County, there are 5,100 homeless adults. About 1,300 homeless children attend Broward County public schools. Of the adult homeless population:

- 66% are Broward County residents
- 42% have a high school diploma or a GED certificate
- 50% have been homeless for less than one year
- 20% are employed
- 50% are Caucasian; 35% are Black
- 50% are ages 35-64; 40% are ages 18-34
- 17% are veterans
- 39% suffer from alcohol abuse
- 32% suffer from drug abuse
- 21% have the AIDS virus
- 17% have a physical disability

For the population that resided in the homeless tent prior to its closing:

## Exhibit B

- 39% were between the ages of 45-64
- 50% were Black; 38% were White; 11% were Hispanic
- 38% were born in another state; 29% were born in Florida
- 45% have spent at least five years in Broward
- 38% have been homeless for at least one year
- 78% were male
- 74% have been homeless some place else
- 69% have been in the military
- 39% have a physical disability
- 37% completed high school
- 53% currently use drugs or alcohol
- 24% became homeless after loss of employment or income; 17% because of family problems

According to the Broward Coalition for the Homeless 2000 Census Survey, 22% of the homeless population is below age 18, with 6% unaccompanied youth, and 12% with their families. An additional 6.85% are between the ages of 18 and 21, with 6% unaccompanied youth, and 85% with their families. There are approximately 5,315 homeless persons in Broward County. Roughly, 33% (1,754) are estimated to be both homeless and mentally ill and in need of mental health services. As reported in an application submitted to HUD from the Broward County Housing Authority and Henderson Mental Health Clinic, "there are two major changes in institutionalization policies (in Broward County) that affect the number of homeless mentally ill. First, the judicial system has a Mental Health court which is dedicated to swift and fair adjudication of mental health consumers with misdemeanor charges. This, however, has created a need for more housing as consumers are being freed into the community instead of remaining incarcerated. Secondly, the State of Florida downsized and privatized the State Hospital (in the southern part of Broward County). This is creating a need for more community housing for mental health consumers in order to prevent them from becoming homeless.

Broward County has a Homeless Initiative Partnership office, which coordinates homeless assistance throughout the county. They held a planning day on March 23, 2000 to develop priorities for the Broward County Homeless Continuum of Care application. The following priorities were identified:

- Permanent Housing (including Single Room Occupancy) for individuals and families with disabilities and for veterans; individuals with severe mental illness and/or substance abuse problems; and individuals with physical disabilities including HIV/AIDS.
- Transitional housing for individuals and families with physical disabilities and medical needs to provide recuperative care; victims of domestic violence; and veterans

## **Exhibit B**

- Permanent and transitional housing targeted to unaccompanied youth (16-26)
- Supportive services targeted for individuals and families in shelters for: case management and life skills training; job training (including vocational and educational opportunities; substance abuse treatment and mental health care; legal aid; child care; and housing placement
- Safe havens for persons with severe persistent mental illness
- Permanent housing for elderly (individuals) and transitional housing for veterans (families)

In its Annual Report to the Governor, the Broward Homeless Coalition identified the following actions to address homeless problems in Broward County: more support services for very low income individuals and families; funding targeted to very low income; mandated zoning for affordable and supportive housing; increased services for the mentally ill, the disabled, and veterans; more child care; and transportation.

The report identifies the increase in family homelessness as a priority need in South Florida, which is increasing in other parts of the nation as well. This means that more and more children are without shelter, food or in some cases, education. There is an increase among female homelessness as well as pregnant females.

There are only two emergency shelters in Fort Lauderdale. The Salvation Army's emergency for homeless persons has 100 beds. The shelter provides both meals and lodging, for all ages and sexes, and is usually filled to capacity. The second facility is the Homeless Assistance Center, located at 600 N. Sunrise Boulevard, which has the capacity to house 200 homeless persons for up to 60 days. Full assessment is provided at the Center, and referrals to additional services are made wherever possible.

## **Lead-Based Paint Hazards**

The City has estimated the number of housing units within the City that are occupied by low-income families or very low-income families that contain lead-based paint hazards, based on data gleaned from the 1990 U.S. Census, and information provided by HUD on its Lead-Based Paint Notification Handouts. The handout states that about three out of four pre-1978 buildings have lead-based paint. The Census identifies 75,076 housing units in the City built prior to 1980, with 13,758 of the units vacant, 34,266 owner-occupied (95% of all owner-occupied units) and 28,052 renter-occupied units (89% of all renter-occupied units). Also, the Census identifies 1,902 very low- and low-income owner-occupied households in the City (5% of all owner-occupied units) and 6,639 very low and low-income renter-occupied households in the City (22% of all renter-occupied households). If it is assumed that the same percentages of very low- and low-income owner- and renter-occupied households that occupy all units can be

**Exhibit B**

used to estimate the number of such households occupying g structures built prior to 1980, then 1,713 very low- and low-income owner-occupied households and 5,951 very low- and low-income renter-occupied households may be affected by lead-based paint hazards.

In addition, the City undertook extensive efforts to determine number and locations of units already identified with lead-based paint hazards. Contacts were made with various health and social service agencies in Broward County to obtain information on specific cases where children were at risk, or had high blood lead counts. Broward County Health Department - Disease Prevention of Broward provided information from their EPI-INFO database. This database is derived from information collected when medical providers perform tests and find lead levels greater than 10, at which time they notify the health department. The information is collected into the data base on an annual basis. In 1999, 56 cases were reported in Broward County, but only 8 were in Fort Lauderdale. Four were in zip code 33311, 2 in 33305 and 2 in 33312.

The City actively enforces the lead-based paint requirements in all of its rehabilitation programs. Staff of the HCDD recently attended training for lead-based paint and will do increased testing of all rehabilitation units. All units identified with lead-based paint will be mitigated according to the HUD regulations.

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**HOUSING MARKET ANALYSIS**

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**General Characteristics of the Metropolitan Area**

Broward County is the 20th largest county in the United States, with a population of just under 1.3 million and is the second largest political jurisdiction in the State of Florida. It is located in the heart of southeast Florida's seaboard strip known as the "Gold Coast". Broward County covers 1,209 square miles, spanning the 25 miles between Palm Beach County in the north and Miami-Dade County in the south. From the Atlantic Ocean, the County stretches westward 50 miles, through the Everglades to Collier and Hendry Counties. Approximately two-thirds of the County's land is set aside as a conservation Area and for Indian Reservations. The County's existing and future development, and the majority of its population is concentrated in the remaining 410 square miles east of the Conservation Area. there are 29 municipalities in Broward County.

Broward County, which was incorporated in 1915, was developed primarily as a resort community. The attractiveness of the area fueled the rapid growth of a retirement community prior to 1980. This growth has slowed during the past decade. Currently, the economy of the County rests heavily (approximately 87%) on service-producing industries. goods-producing industries including construction, manufacturing and agriculture account for the remaining 13% of the economic base. The County is primarily urban in nature. The cost of living is comparatively higher than that of many

**Exhibit B**

rural Florida counties, as well as a number of other urban sectors, making it more difficult for those who are unemployed.

The County is ideally situated to provide support for new and existing businesses due to the location of major transportation networks to conduct local, national and international trade. Major existing transportation facilities include: Port everglades, which is the second largest cruise port in the U.S.; Fort Lauderdale/Hollywood International Airport, which is a major airport offering passenger, charter and cargo services; Fort Lauderdale Executive Airport, which is one of the busiest small airports serving private planes; and a Helistop located in downtown Fort Lauderdale, which provides the opportunity for businesses to be within minutes of Executive Airport and south Florida's three international airports in West Palm Beach, Fort Lauderdale, and Miami. In addition, the Florida East-Coast Railway, Amtrak, Interstates 95,75, and 595, and the Florida Turnpike also serve the County.

**General Characteristics of the City**

The City of Fort Lauderdale was incorporated in 1911 and is the largest City in Broward County with a 1990 Census population of 149,377. Fort Lauderdale has the feel of a city much larger in size, serving as the business, cultural, governmental and financial center of a populous county. While the major industry in the City traditionally has been tourism, significant effort has been put into diversifying the economic base. The film industry has become an important part of the City's economy, and the area surrounding Executive Airport contains the largest concentration of clean, high-technology industrial operations in South Florida. The City is establishing a Foreign-Trade Zone at Executive Airport and six other qualified sites, under the approval of the U.S. Department of Commerce. The new zone will offer businesses significant cost savings and economic incentives and promote job retention and growth for the Greater Fort Lauderdale area.

The city is rapidly becoming an international trade and distribution center due to the unique cluster of transportation facilities on its southern border, as well. An industrial complex south of State Road 84 is emerging to serve that transportation corridor. The infrastructure and transportation network needed to adequately serve the business sector is in place and thriving. Downtown Fort Lauderdale is home to the regional, international and corporate headquarters of some of the world's most prestigious companies. Among those are Alamo Rent A Car, Huizenga Holdings and Templeton Worldwide. Also located in downtown Fort Lauderdale are campuses of Broward Community College and Florida Atlantic University, as well as the City's new Riverwalk recreational area, the Broward Center for the Performing Arts, the Museum of Science and Discovery, the Opera guild, the Museum of Art, and Parker Playhouse. A major new development, Riverfront, has added restaurants, shops and movie theaters to the Riverwalk area. As new businesses move into the city, the need for housing for workers of all income levels becomes essential.

## Exhibit B

### Housing Characteristics

The City of Fort Lauderdale is a developed urban area, with very little vacant, buildable land available for residential development. According to census data during the decade between 1970-80, the City of Fort Lauderdale's housing stock grew at an average rate of 2% per year. This trend stopped by 1980. According to the City's Comprehensive Planning Report prepared in December, 1987, during 1980-85 the City's population decreased by an average of 1.3% annually. The rate of decline was expected to continue at that same rate until 1989, when the population would again begin to increase at the rate of .225% per year until the City achieves build-out. However, the decline in population continued, according to the 1990 census population count. The increase in population was expected to be achieved by the institution of new policies which would permit higher density multi-family and mixed-use developments in and around the Central Business District. The Comprehensive Plan discussed two major shifts in the City's housing stock: (1) a decline in the number of middle income families and the number of middle-range housing units; and (2) a decline in homeownership. From 1970-80, 7 of 11 middle class tracts experienced a decline in the number of middle range housing units. In 1980, approximately 58% of the housing stock was owner-occupied. by 1990, the number of middle income census tracts had dropped to 10, and the percentage of homeowners to 54%. According to the City's Comprehensive Plan 1.2% of single-family units have been lost since 1980 and multi-family units have increased by 10.5%.

The greatest concentration of renter-occupied units is located in census tracts 415 and 416, which are the two poorest census tracts in the City. The City's 1984 Neighborhood Demographic Survey showed an increase in the number of lower income families residing in the City, with a corresponding decline in the number of middle income and higher income families. In spite of this, the average cost of housing rose in the City as a much higher rate than for the County as a whole, because of the lack of available, buildable land. The most affordable homes are located in the northwest quadrant of the City, which also has the highest concentration of minorities, lower-income residents and criminal activity.

Lower-income and minority populations are located primarily in the northwest quadrant of the city, in the area the City has designated as its Safe Neighborhoods District, the Northwest Neighborhood Improvement District (District). This area contains a high proportion of the City's substandard housing. While only 8% of the City's housing units are located in the District, 20% of the code violations and 36% of the condemnations occurred there in 1987, the year before the Safe Neighborhoods study. It is estimated that at least 25% of the structures in the District are substandard. This area is targeted for concentrated neighborhood revitalization activities, including rehabilitation of renter and owner-occupied housing, demolition of substandard structures beyond repair, construction of new infill housing, facilitation of the transfer of abandoned properties, public housing improvements and implementation of Crime Prevention Through

## **Exhibit B**

Environmental Design (CPTED) techniques to reduce crime and increase safety for neighborhood residents. Five strong homeowners associations operate in this area and are active supporters of owner-occupied rehabilitation, infill housing, and rental rehabilitation programs. Maps showing the concentration of lower income households and minorities are included in the Supporting Documents section following this narrative, and a discussion of minority housing needs is included in the section of the CP for housing needs of special populations.

The number of housing units estimated to contain potential lead-based paint hazards is high, since the majority of housing in the City was constructed prior to 1970. We will be working closely with state and local health agencies to identify units and level of assistance needed to address the lead-based paint abatement problems.

## **Fast Facts about the City**

According to the 1990 U.S. Census:

- The City's population is 149,377, which is 2.6% less than the 1980 population.
- The City has 23,857 people under the age of 14 (16%).
- 81% of the population (121,321) are 18 years of age or older.
- Only 31,107 people are 62 or older (21%).
- 19% of the population is under age 18.
- The median age is 37.1 years.
- Of the 149,377 persons, 144,355 (97%) live in households 66,440 households (2.17 per household).
- Of the 66,440 households, 34,127 (51%) are family households of related individuals, and 38% are single person households.
- The average family size is 2.9 persons.
- There are 26,562 persons age 65 and over. 25,413 of these persons (96%) live in households, with 9,086 persons living in single person households.
- 1,119 persons 65 and over are institutionalized and 30 live in group quarters. This represents 31% of all persons institutionalized, but only 2% of those in group quarters.
- 48% of all children under the age of 5 reside in census tracts 408, 409, 415, 417,

## Exhibit B

427, and 428. The median age in these tracts is well below the median age for the City, ranging from 25.5 in census tract 415 to 31.5 in census tract 427.

- 58% of those 65 years and older live in census tracts 402.2, 405.1, 404, 406, 422, 402.01, 403, 405.2, 420, and 421. The median age in these tracts is well above the median age for the City, ranging from 43.7 in census tract 415 to 69.9 in census tract 405. 01.
- Of the 9,084 children under the age of 5, 4,111 (45%) are white and 4,716 (52%) are Black.
- The median age of the white population in the City is 42.2. The median age of the Black population is 27.0.
- Of the 26,562 persons 65 and over, 24,235 (91%) are white and 2,156 (8%) are Black.
- Of the 22,299 single person households, 22,299 (89%) are white.
- The Black population of the City is 41,995 (28%).
- Of the 34,127 families in the City, 4,011 (12%) are female-headed households with children under 18 years of age.
- Of the 28,056 children under 18, 7,718 (28%) live in female-headed households.
- Of the total Black population, 14,867 are children under 18 years of age, which is 53% of all children in the City.
- 5,674 Black children live in female-headed households, or 38% of all Black children.
- Of the 7,718 children in female-headed households, 74% are Black.
- Of the 8,819 Black families, 2,615 are female-headed households with children under 18 (30%).
- 10,681 of the City's population is Hispanic (7%). The median age is 31.1, 2,298 (22%) are children under 18 and 991 (9%) are 65 and over. Of the 2,378 families, 245 are female-headed households with children under 18 (10%).
- The City has 81,268 housing units. Of these, 66,440 are occupied and 54% are owner-occupied. Of the 36,144 owner-occupied units, 4,013 (11%) are Black owners. Of the 30,296 renter-occupied units, 8,601 (28%) are Black renters.

**Exhibit B**

- 60,971 occupied housing units have 1 person or less per room, so only 8% of the units citywide are overcrowded. Of the 14,828 vacant housing units, only 213 are boarded-up (1.4%).
- 80% or more of the housing units in the following tracts are owner-occupied: 405.01, 411, 422, 431, 501, 502.01, and 502.02.

**Areas of Minority Concentration**

The City's population, according to the 1990 U.S. Census, is 149,377. The population is 64% white, non-Hispanic, making the minority percentage of the population 36%. The largest minority group in the City is Black, non-Hispanic, with 40,802 or 28% of the total population. The second largest minority group is Hispanic, with 10,681 or 7% of the total. The remainder of minorities represented in the City are: Native American - 281; Asian and Pacific Islander - 1,208; and other (non-Hispanic) - 119. A total of 73,614 persons (49%) live in census tracts which are at least 90% white or 90% minority. Fifty-two percent of all white, non-Hispanic persons live in tracts which are at least 90% white.

Seventy-seven percent of all white, non-Hispanic persons live in census tracts which are at least 80% white. An area of minority concentrations defined as any census tract in which the percentage of minority population exceeds the percentage of minority population for the total City by 10%. Conversely, areas of under represented minority population is defined as any census tract in which the percentage of white, non-Hispanic persons exceeds the percentage of white, non-Hispanic persons for the total City by 10%. It is necessary to define both concentrations of minorities and of non-minorities since racial diversity is dependent upon representation throughout the City. Using this definition, 20 of the city's 36 census tracts qualify as areas of under represented minority population. This represents 79% of the City's white, non-Hispanic population. Of the remaining tracts, 14 are areas of minority concentration. Only 2,050 minorities (4%) live outside of areas of minority concentration or under representation.

**Areas of Low-Income Concentration**

Areas of low-income concentration are defined as any census tract or block group within a census tract which has 51% or more of its households at or below 80% of the area median income. This definition is being used to be consistent with CDBG-eligible areas.

**CDBG-ELIGIBLE CENSUS TRACTS  
Based on 1990 U.S. Census  
Census Tract/Block Group**

**CT 407/BG 4  
CT 408/BG 1,2,3,4  
CT 409/BG 1,3  
CT 410/BG 1,2**

**Exhibit B**

**CT 414/BG ALL  
CT 415/BG ALL  
CT 416/BG ALL  
CT 417/BG ALL  
CT 418/BG 5,7  
CT 419/BG 5  
CT 423/BG 2,3  
CT 425/BG 3,4  
CT 426/BG 1,4,5  
CT 427/BG 1,3  
CT 428/BG ALL  
CT 430/BG 1,6  
CT 433/BG 4,5  
CT 501/BG 3  
CT 502.02/BG 9  
CT 503.04/BG 5  
CDBG MAP**

**Exhibit B**  
**Public and Assisted Housing**

Part of the low-income rental need is met by the Housing Authority of the City of Fort Lauderdale (HACFL), which operates 888 public housing units, and 1,428 Section 8 assisted housing units. There is a waiting list of 300 for the public housing units and the average wait time is 2-3 years. There is a waiting list of about 200 for the Section 8 program and the average time on the list is 1-3 years.

Construction of new units is not likely, unless Congress enacts legislation specifically for the construction of such deep subsidy units. While the HOPE VI program does address the replacement of public housing units, there are no HOPE VI designated projects in the City. Even if a project were to be designated as HOPE VI eligible, this resulting project would not likely add any additional public housing units to the inventory.

The mission statement of the HACFL states:

**“The mission of the Fort Lauderdale Housing Authority is to be the area’s affordable housing of choice. We provide and maintain safe, quality housing in a cost-effective manner. By partnering with others, we offer rental assistance and other related services to our community in a non-discriminatory manner.”**

**Housing Authority 5-year Goals**

The Five Year Goals Agency’s Plan under Section 511 of the Quality Housing and Work Responsibility Act of 1998 are:

Goal One: Manage the Fort Lauderdale Housing Authority’s existing public housing program in an efficient and effective manner thereby qualifying as at least a standard performer.

Objectives:

- (a) HUD shall continue to recognize the Fort Lauderdale Housing Authority as a high performer by December 31, 2004.
- (b) The Fort Lauderdale Housing Authority shall make our public housing units more marketable to the community as evidenced by an increase in our waiting list to one that requires a six-month wait for housing by December 31, 2004.
- (c) The Fort Lauderdale Housing Authority shall promote a motivating work environment with a capable and efficient team of employees to operate as a customer-friendly and fiscally prudent leader in the affordable housing industry.

**Exhibit B**

Goal Two: Provide a safe and secure environment in the Fort Lauderdale Housing Authority's public housing developments.

Objectives:

- (a) The Fort Lauderdale Housing Authority shall endeavor to reduce crime in its developments so that the crime rate is less than their surrounding neighborhood by December 31, 2004.
- (b) The Fort Lauderdale Housing authority shall refine the memorandum of understanding between the jurisdiction's police force and this agency. The purpose of this is to better define the "edge problem" of crime that occurs near our developments and develop strategies for identifying and reducing this problem.
- (c) The Fort Lauderdale Housing Authority shall reduce its evictions due to violations of criminal laws by 20% by December 31, 2004, through aggressive screening procedures.

Goal Three: Expand the range and quality of housing choices available to participants in the Fort Lauderdale Housing Authority's tenant-based assistance program.

Objectives:

- (a) The Fort Lauderdale Housing Authority shall establish a program to help people use its tenant-based program to become homeowners by December 31, 2004.
- (b) the Fort Lauderdale Housing Authority shall achieve and sustain a utilization rate of 98% by December 31, 2004 in its tenant-based program.
- (c) The Fort Lauderdale Housing Authority shall attract 250 new landlords who want to participate in the program by December 31, 2004.

The following are policies in the Housing Authority's Annual Plan:

- They have adopted 3 local preferences: for applicants who live or work in Fort Lauderdale; for working families (seniors and people with disabilities automatically get this preference); and for victims of domestic violence.
- They have adopted an aggressive screening policy for public housing to ensure to the best of their ability that new admissions will be good neighbors. In the Section 8 program, they are screening applicants to the fullest extent allowable while not taking away the ultimate responsibility from the landlord. The screening

## **Exhibit B**

practices meet all fair housing requirements.

- They have implemented a tenacious deconcentration policy.
- Applicants will be selected from the waiting list by preference and in order of the date and time they applied.
- They have established a minimum rent of \$25.00.
- they have established ceiling rents for all of the developments.
- To encourage work and advancement in the workplace, they do not requiring interim recertification if a resident or Section 8 participant has an increase in income. The increase will be reported at the next regular recertification.
- They will utilize the published Fair Market Rents as the payment standard for the Section 8 program.

For more than a decade the HACFL has provided a variety of social service opportunities to youth and adult public housing residents. The range of programming has focused on health, education, job training, recreation, case management, counseling, business development and entrepreneurship, life skills and a host of related topics. The HACFL has established a number of programs that offer services targeted to the needs of its residents, including:

- Step-Up Apprenticeship Program provides job training for residents over the age of 18 in the building trades for maintenance and repairs. About 25-30 persons are trained each year. There are about 15 people on the waiting list and the average wait time is 1-2 months.
- Affordable Home Ownership Program purchases and rehab existing homes and constructs new homes for sale. The program is open to anyone who can qualify for a mortgage
- After school and summer youth programs provides After school care for elementary age children during the school year. Provides summer camp for children ages 5 through 15 for 9 weeks during the summer. Children residing at the public housing sites are eligible.

Public Housing Resident are actively involved in the management of their complexes, through tenant associations. Each association has a Board and elected officers. All new programs and services are presented to the associations for discussion and votes. In addition, the associations hold tenant hearings to resolve disputes. The City encourages homeownership among public housing residents by soliciting Housing

**Exhibit B**

Authority assistance in marketing City-sponsored homeownership opportunity programs to public housing residents.

The following units are included in the HACFL's conventional public housing inventory:

**TABLE E  
PUBLIC HOUSING INVENTORY**

Site and Address	Year Built	Efficiencies	1-bedroom	2-bedroom	3 or more bedroom	Total Units
Dr. Kennedy Homes, 1004 W. Broward Boulevard	1940	48	34	36	14	132
Dixie Court, 324 W. Dixie Court	1940	0	49	67	34	150
Sunnyland Homes, 841 NW 13 Terrace	1959	0	0	8	76	84
Suncrest Court, 1615 NW 23 Avenue	1962	0	0	6	60	66
Sailboat Bend, 427 SW 4 Avenue	1972	62	42	1	0	105
Lakeview, 2265 NW 2 Street	1973	0	4	60	46	100
Oak Park, Scattered Sites			51	29	4	84
Sunnyreach Acres, SW 18th Avenue	1976	0	112	12	5	129
Sistrunk Gardens, 1414 Sistrunk Boulevard	1976	0	0	16	22	38
TOTAL		109	292	225	261	888

These units are owned and operated by the Housing Authority and are well-maintained. The most recent 5-year CGP summary is included in Appendix B of this Plan.

The City collaborates with the Housing Authority by providing CDBG funds to support the Step-Up program, and by providing funds to Housing Enterprises, Inc., the CHDO for the Housing Authority. In addition, the tenants organization has formed a nonprofit corporation, the United Residents Council (URC), which is operating a transportation company, and other entrepreneurial operations. The City has provided funds to the URC to operate one of its vans.

Public housing residents are actively involved in the management of their complexes, through tenant associations. Each association has a Board and elected officers. All new programs and services are presented to the associations for discussion and votes. In addition, the associations hold tenant hearings to resolve disputes. The City encourages homeownership among public housing residents by soliciting Housing Authority assistance in marketing City-sponsored homeownership opportunity programs to public housing residents. The Housing authority has received funding under the Family Self-Sufficiency program, and in partnership with City has constructed 27 and

**Exhibit B**

anticipates constructing 10-12 more new single-family homes for lower-income first time homebuyers.

**Other Assisted Housing**

In addition to the public housing units listed above, there are 1,096 other federally-assisted units, including:

Alan Apartments	915 NW 6 Street	72 units
Broward Gardens	2960 NW 19 Street	96 units
Gateway Terrace	1943 NE 6 Court	257 units
Hillmont Gardens	2001 NW 9 Avenue	127 units
Mt. Olive Garden	1701 NW 6 Court	60 units
New Citrus Park	765 NW 12 Avenue	68 units
North Fork Garden	1422 NW 2 Street	65 units
Federal Apartments	821 NW 11 Avenue	164 units

None of these units are expected to be lost from the assisted housing inventory for any reason during the next five years.

**Housing Available to Special Needs Populations**

According to the best estimate that can be made at this time, the following facilities and services are available for special needs populations:

**INVENTORY OF FACILITIES AND SERVICES FOR THE HOMELESS AND OTHER SPECIAL NEEDS POPULATIONS**

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**The Salvation Army, P.O. Box 230, Fort Lauderdale, Fl. 33302**

- Homeless shelter provides emergency and transitional shelter for homeless families and individuals. The program services an average of 2000 persons per year. There is no waiting list for the program since it is worked on a first come, first served basis.
- Transitional Shelter for Families provides long-term housing and services for families. Homeless families referred from emergency shelters are eligible for this program. The program serves an average of 90 persons per year and there is no waiting list.
- Emergency Assistance provides financial assistance for rent and utilities, food pantry and clothing to low income individuals and families. The program serves over 1500 persons per year and there is no waiting list.
- Christmas Angel Tree provides toys and gifts for needy children of low income

**Exhibit B**

families.

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**Homeless Assistance Center, Broward Coalition for the Homeless, 400 N. Andrews Avenue, Fort Lauderdale, FL. 33301**

- Homeless intake and placement. The program coordinates a total of 524 throughout Broward County. The program serves about 2000 persons per year, there is a waiting list and the average wait on the list is 2 days.
- 

**Shadowood II, 307 SW 5th Street, Fort Lauderdale, FL. 33315**

- HOPWA Project Based Housing, a structured group home providing food, clothing, shelter and social services to its homeless PWAHS in Broward County. Homeless, indigent adults living with HIV/AIDS are eligible for the program. They serve an average of 120 persons per year and have at least 12 persons on the waiting list from 5 to 20 days.
  - HOPWA Substance Abuse Housing, a structured group home providing food, clothing, shelter and social services to PWAHS with substance abuse problems. Residents must attend chemical dependency classes 15 hours per week. The program serves an average of 140 persons per year. There are approximately 9 people on the waiting with an average wait of 5 to 10 days.
- 

**BETA, 3800 Inverrary Blvd., Lauderhill, FL 33319 (also provide services in Pompano and Hollywood)**

- Job Link Broward, a one-stop center for job placement and employer recruitment services. anyone is eligible. There is no waiting list.
- Intensive Services provides job training and placement assistance to welfare recipients and anyone referred from Job Link Broward. There is a waiting list, but the average waiting time is 1 week.
- SER/BETA Tec. provides occupational skills and job placement. The program is eligible to individuals who have low income or barriers to employment, and/or are dislocated workers. The program serves an average of 115 persons per year. There is a waiting list and the time on the list varies depending on the type of training requested.
- BCC Industry Based Training, provides job training customized to specific employer's qualifications. The program is limited to individuals who have low

**Exhibit B**

income or barriers to employment, and/or dislocated workers.

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**Ann Storck Center, Inc., 1790 SW 43 Way, Fort Lauderdale, FL 33317**

- Immediate Care Facility for the developmentally Disabled program provides residential services including prescriptive therapies and equipment. Medicaid eligible residents of Broward County who have developmental disabilities are eligible for the program. The program serves an average of 48 people per year. There is a waiting list of about 46 and the average time on the waiting list is 5-8 years.
  - Four group homes with 6 beds each. The homes provide residential services including prescriptive therapies and equipment in a home in a residential neighborhood. Medicaid eligible residents of Broward County who have developmental disabilities are eligible for the program. The program serves an average of 24 people per year. There is a waiting list of about 46 and the time on the waiting list is 5-8 years.
  - Ann Storck center Developmental Training Program provides pre-vocational day program for adults with developmental disabilities who are no longer eligible for Broward County Public Schools. Medicaid eligible residents of Broward County who have developmental disabilities and are no longer eligible for Broward County Public Schools are eligible for the program. The program serves an average of 76 people per year. There is a waiting list of approximately 55 and the average time on the list is 3-5 years.
  - Ann Storck Center Preschool is a preschool for children from birth to age five who have or are “at risk” for delays and who meet Part B/C eligibility and/or Broward School Board (State) criteria. The program serves 120 people per year. There is a waiting list of about 10-20 people and the average time on the waiting list is 5 months or less.
- 

**Light of the World, 910 NE 62 Street, Fort Lauderdale, FL 33334**

- Light of the Clinic provides preventative medical health care to indigent immigrants. The program serves an average of 5,000 people per year. There is no waiting list.
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**Susie C. Holley Cradle Nursery, 1301 NW 6 Terrace, Fort Lauderdale, 33311**

- Provides child care for low income families. Serves about 120 persons per year.

**Exhibit B**

There is a waiting list for the program of about 5. The time varies depending upon the age of the child.

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**Hesed Transitional Housing, 2851 Stirling Road, Fort Lauderdale, Fl. 33012, service address at**

- Hesed Transitional Housing provides housing and family support to adults with children coming from shelters. The average number of people served each year is 25-45. There is a waiting list of 3 families, and the time on the list varies.
- 

**House of Hope, Inc., 908 SW 1 Street, Fort Lauderdale, Florida**

- House of Hope/Stepping Stones are residential treatment facilities providing housing and treatment for men and women with substance abuse problems. They serve about 350 people per year. There is a waiting list of 15 women and 10 men. The men stay on the list an average of 10 days and the women an average of 3 weeks.
- 

**The Housing Authority of the City of Fort Lauderdale, 437 SW 4 Avenue, Fort Lauderdale, Florida, 33315****Step-Up Apprentice Program/Affordable Housing Program**

901 NW 10 Avenue, 33311

**Section 8 Rental Program**

1014 W. Broward Blvd, 33312

- public housing throughout the city for eligible very low to low income families and persons. 888 households are served each year. There is a waiting list of 300 and the average waiting time on the list is 2 to 3 years.
- section 8 rental assistance issues rental vouchers to subsidize rent for eligible persons. eligibility is for very low to low income families and persons. They serve 1428 families per year. There is a waiting list of about 200 and the average time on the list is 1-3 years.
- Step-Up Apprenticeship Program provides job training for residents over the age of 18 in the building trades for maintenance and repairs. About 25-30 persons

**Exhibit B**

are trained each year. There are about 15 people on the waiting list and the average wait time is 1-2 months.

- Affordable Home Ownership Program purchases and rehab existing homes and constructs new homes for sale. The program is open to anyone who can qualify for a mortgage
  - After school and summer youth programs provides After school care for elementary age children during the school year. Provides summer camp for children ages 5 through 15 for 9 weeks during the summer. Children residing at the public housing sites are eligible.
- 

**Archways, Inc., 919 NE 13 Street, Fort Lauderdale, FL 33304**

- Day treatment services to keep people with mental illness out of the hospital. Broward residents with a diagnosis of major mental illness ages 18-55 are eligible. About 200 persons per year are served by the program. There is a waiting list of about 10 persons and the average wait time is 30 days.
  - Residential treatment for persons with a diagnosis of major mental illness ages 18-55. About 125 persons per year are served, there is a waiting list of about 6 persons and the average time on the list is 30-60 days.
  - psychiatric services for persons with a diagnosis of major mental illness ages 18-55. The average number of people served per year is 300, and there is no waiting list.
  - Employment services for persons with a diagnosis of major mental illness ages 18-55. About 60 persons are served per year. There is a waiting list of about 20 people and the average time on the list is 60 days.
- 

**First Call for Help, 16 SE 13 Street, Fort Lauderdale, FL 33316**

- help line services provides 24-hour crisis/suicide intervention, information and referral help lines to any caller seeking help with any kind of problem. It is open to all residents of Broward County. The program serves an average of 65,000 persons per year. There is no waiting list for the program.
- Emergency financial assistance provides assistance to pay for rent, mortgage or utilities, food vouchers, emergency hotel/motel, bus passes to eligible clients.

## **Exhibit B**

Clients who have a short-term financial crisis, have exhausted all other resources and have a plan to be self-sufficient in 60 days are eligible for the program. An average of 300 persons per year are assisted. There is no waiting list for the program. However, if one was maintained after funds are exhausted, it would have many names on it.

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### **Center for Independent Living, 8857 West McNab Road, Tamarac, FL 33321**

- Employment services helps people with disabilities obtain competitive employment. services include resume writing, mock interviewing, job placement and job coaching, a support group for persons with disabilities who are working competitively. About 20 persons are served each year.
  - Housing program assists consumers with home financing, locating accessible and affordable property, referral to residential housing programs and coordination of roommate matches. Also facilitates a federal grant project through the City of Pembroke Pines and the City of Plantation to remove architectural barriers. About 80 persons are served each year, with about 15 people on the waiting for the average time of 1 month.
  - Assistive Technology provides devices for disabled persons to use, including computers for access to information.
  - advocacy program assists persons with disabilities in understanding their civil rights under the Americans with Disabilities Act, the Fair Housing Act and the Individuals with Disabilities Education Act. The CIL also provides individual counseling and workshops to address leadership, communication, and letter writing skills.
  - Information and referral provides disabled persons with information about programs and services available in the community. The CIL resource library offers information about disabilities, equipment and community resources. A computer with internet access is also available for consumer use.
  - Independent Living Skills Training provides training in the activities of daily living through individual counseling and workshops, including self-esteem, budgeting, benefits, and health and Wellness. cooking is offered in an accessible kitchen.
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### **Jubilee Soup Kitchen, 1704 Buchanan Street, Hollywood, Florida 33020**

- Soup kitchen provides hot meals Monday through Friday to anyone in need. The program serves over 39,000 persons each year. There is no waiting list for the program.

## **Exhibit B**

- Office of Social Concerns provides clothing, emergency groceries, and transportation to jobs for anyone in need. serves over 1000 persons per year. There is no waiting list
- 

### **God's Little Lambs, 1100 N. Andrews Avenue, Fort Lauderdale, Fl. 33311**

- child care for working poor and homeless families earning less than \$20,000 per year. About 100 children are served each year. There is a waiting list of 10-15 children and the average wait time is 2-3 weeks.
- 

### **The Shepherd's Way, 1822 N. Dixie Highway**

- housing to get families off of the street. The program is open to any homeless family. The average number of persons served each year is 300. There are 8-10 families on the waiting list with an average wait time of 2-3 weeks.
- 

### **Jack and Jill Nursery, Inc., 812 S.W. 2 Street, Fort Lauderdale, Fl 33312**

- Jack and Jill Nursery works to break the cycle of poverty for the children of low income working families of Broward County through family oriented pre-school child care services and family support/intervention. Low income working families are eligible for the child care. An average of 225 children are served each year. There are approximately 40 children of the Nursery's private scholarship parents are on the waiting list, and the Family Central List is also their waiting list. Families wait up to 6 months to get placement at the center.
- 

### **Lighthouse of Broward, 650 N. Andrews Avenue, Fort Lauderdale, Fl. 33311**

- Rehab for the blind, a 9 week rehab program for legally blind individuals. The program serves an average of 7000 persons per year. There is a waiting list of about 12 persons and the average stay on the list is 10 weeks.
- 

### **Broward Outreach Center, 2056 Scott Street, Hollywood Florida, 33020**

- Recovery Program provides full service treatment of homeless needs. The program serves about 300 persons per year. There is a waiting list of 3-8 persons and the average time on the list is 2-10 days.

## **Exhibit B**

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### **Women in Distress of Broward County, P.O. Box 676, Fort Lauderdale, Fl. 33302**

- Adult/Children's Domestic Violence Counseling provides group/info and assessment services to victims of domestic violence. The program serves about 1000 persons per year. There is a waiting list of about 20 persons and they are on the waiting list for an average of 6 days.
  - Client services for women suffering from domestic violence, with children and homeless women with children. Victims of Domestic Violence and perpetrators are eligible. The program serves about 1,315 persons per year. There is no waiting list for the program.
  - Emergency shelter for victims of domestic violence and homeless women with children. An average of 629 people are served each year. There is no waiting list for this program.
- 

### **Habitat for Humanity of Broward,**

- Homeownership program - new home construction to provide homes to low and very low income families. The program is open to all Broward County families who meet the income eligibility criteria. An average of 800 persons per year are served by this program. There is a waiting list and the average time on the list is 1 year.
- 

### **Broward Meals on Wheels, 5950 W. Oakland Park Boulevard, Suite, 301**

- Home delivered meals to people 60 years of age and older and homebound persons. The program serves about 1800 persons per year. There is not a waiting list for the program.
  - Congregate Nutrition provides meals daily at a senior center for persons 60 years of age and older. This program serves over 3500 persons per year and there is no waiting list.
  - Outreach provides in-home assessment and referral for persons 60 years of age and older and homebound persons. Over 1000 persons are served each year and there is no waiting list for outreach.
- 

### **Fort Lauderdale Hospital, 1601 E. Las Olas Blvd. Fort Lauderdale, Fl. 33301**

- in-patient and out-patient psychiatric and chemical dependency services. The

**Exhibit B**

program serves adults, and serves over 2000 inpatients per year. There is no waiting list.

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**Mt. Bethel Human Services Corporation, 1409 Sistrunk Blvd. Fort Lauderdale, Fl. 33311**

- Neighborhood Empowerment & Self-sufficiency provides intensive employment services program for the 33311 area. lower income 33311 residents not receiving WAGEs are eligible for this program. About 200 people are served each year. There is a waiting list of about 25 persons and the wait time is about 45 days.
  - Mt. Bethel Family Resource Center is a one stop family service center with services that include child care financial assistance, hiv/aids testing, outreach services, healthy start, and other programs. The services are open to residents of Fort Lauderdale. About 3-400 persons are served each year. There is a waiting list of about 50 for financial assistance for child care. The waiting time is unknown since the wait is dependent upon receiving new funding from city.
  - Focus on Me After school programs (Larkdale and Sunland elementary). This is an After school project for boys 3-6 grades as a prevention tactic. The program is for males who attend designated schools that have low attendance, low academic performance, and behavior problems. The program serves about 120 males per year. There is no waiting list for the program.
  - Teen Alliance with Clergy (TAC) serves 500 youth. Juvenile Diversion Program for Juvenile Offenders ages 5-17 who have committed misdemeanor crimes. Youth referred by the State Attorney or the DJJ are eligible.
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**Jewish Family Services, 100 S. Pine Island Road, Suite 130, Plantation, Fl. 33324**

- FEMA Emergency Food Program provides food vouchers for families in need. anyone in need is eligible. The programs serves about 550 families per year. There is no waiting list
  - Counseling is provided to children through senior citizens. About 770 persons are served per year. There is no waiting list.
  - Senior Services provide case management services to seniors in need. About 650 persons are served by this program. There is no waiting list.
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**Exhibit B**

**Center One, Inc. , 2817 E. Oakland Park Blvd, Fort Lauderdale, Fl. 33306**

- Case management provides client centered services that link the client to the community resources. Eligible to HIV positive > 300% of poverty. The program serves about 975 persons per year. There is no waiting list.
  - Transportation - provides non-emergency transportation services to HIV positive of poverty. Program serves 1300 per year, and there is no waiting list.
  - Clinical Services - provides psychotherapy, complimentary therapies, support groups for HIV positive of poverty. The program serves 787 persons per year. There are about 4 people on average on the waiting list, and the average wait time is 2 weeks.
  - Education - workshops on HIV, free anonymous testing. Open to the general public.
- 

**Covenant House Florida, 733 Breakers Avenue, Fort Lauderdale, Fl. 33304**

- Street Outreach to identify runaway/homeless youth and offer help. Eligible to youth under age 21. The program serves over 2,250 people per year. There is no waiting list.
  - Emergency Shelter - provides 104 beds, food clothing, counseling, and case management to youth under age 21. The program serves 1,300 persons per year. There is no waiting list for the program.
  - Transitional Housing - 16 beds in scattered apartments for youth under age 21. Program serves 25 persons per year and there is no waiting list.
  - Community Service Center provides non-residential day services (food, clothing, counseling, case management, employment assistance, substance abuse treatment, etc.) for youth under age 21. Program serves 750 persons per year.
- 

**Susan B. Anthony Center, 3500 N. State Road 7, Suite 351, Lauderdale Lakes, 33319**

- Transitional housing for substance addicted women and their children - about 50 people are served each year. There is a waiting list of about 3-5 families on the average, and the time on the list if 30-45 days.
-

**Exhibit B**

**Catholic Charities, 1505 NE 26 Street, Wilton Manors, FL. 33305, 1105 NW 6 Avenue, Ft. Lauderdale, 33311, 2533 SW 9 Avenue, Ft. Lauderdale, 33315**

- Family counseling at 7 satellite offices offers short-term counseling to individuals, couples and families based on a sliding fee scale, ability to pay. It is open to Broward County residents who can benefit from service and serves over 400 persons per year. there is a waiting list for the program and the time on the list is about 2-3 weeks.
- Haitian Job Development Services provides professional help to find jobs and learn skills necessary to continue employment. English and literacy classes are offered. It is open to Broward County Haitian residents and serves over 680 people annually. There is not a waiting list for this program.
- Emergency Services Assistance provides emergency food, utility assistance or rent for families in danger of being evicted. Limited funds are available. The program is open to Broward County residents and serves over 9300 persons annually. There is a waiting list for this program.
- Adult Day Services provides licensed day care for frail elderly and adults with special needs and is provided at 3 locations: Pompano Beach, Wilton Manors, and Davie. The Program is open to Broward County residents and serves about 250 people each year.

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**Area Agency on Aging of Broward County, 5345 NW 35 Avenue, Fort Lauderdale, Florida 33309**

- Community Care for the Elderly Program. Services provided include: care management; personal care; homemaker; respite; emergency alert response, etc. The program is available to Broward County seniors over the age of 60 and serves over 4,600 persons per year. There are over 1,200 people on the waiting list for this program and the average wait is 2 years.
- Senior Centers/Senior Day Care Centers. various services are provided: recreation; counseling; transportation, etc. The program is open to Broward County residents over the age of 60 and serves over 12,200 persons annually. There is no waiting list for this program.
- Alzheimer's In-home and Facility Respite provides respite for care givers of Alzheimer's patients. The program is open to Broward County residents and serves over 200 persons per year. There is no waiting list for this program.
- Broward Meals on Wheels Program provides home delivered meals to homebound seniors. The program is open to Broward County residents over the

**Exhibit B**

age of 60 and serves over 2,900 persons per year. There is no waiting list for this program.

- Site (Congregate) Meals are provided at various sites for Broward County seniors over the age of 60. Over 6,600 persons are served annually and there is no waiting list for this program.
- Home Touch Program provides minor in-home repair services for elderly clients. Repairs include carpentry, plumbing, electrical and other repairs necessary to preserve health and safety in the owner-occupied home. The program serves over 350 persons per year. There are an average of 200 persons on the waiting list.
- Senior Connection provides information and referral services to Broward County residents over age 60. The program serves over 700 persons per year and there is no waiting list.
- Home Care for the Elderly Program provides a care giver stipend and home services for the elderly. The program is open to Broward County seniors and serves over 740 people per year. There is no waiting list for the program.
- Senior citizen Law Project provides legal assistance for elderly Broward County residents. The program serves over 980 persons per year and there is no waiting list.
- Medicaid Waiver Home and Community Based Services provides in-home services for seniors. Medicaid waiver eligible Broward County seniors are eligible. Over 530 persons are served annually by this program and there is no waiting list.
- Medicaid Waiver Assisted Living Services provides services to seniors living in assisted living facilities. The program is open to Medicaid waiver eligible Broward County seniors and serves over 120 persons annually. There is no waiting list for this program.

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**Urban League of Broward, 11 NW 36 Avenue, Ft. Lauderdale, FL. 33311**

- ROOTS (Returning Opportunity and Optimism Through Services. ROOTS is a community-based substance abuse prevention after-school program, designed to target 100 at-risk youth for substance abuse prevention education through leadership development and community service activities. Participants work with neighborhood councils and leaders to establish drug-free neighborhoods. The program is offered at the following sites: Samuel Delevoe Park, 2520 NW 6th

## Exhibit B

Street; Regal Trace Apartments, 540 NW 4 Avenue, St. George's Park, 3501 NW 8 Street, and Cambridge Square Apartments, 3841 NW 21 Street.

- Project Images is a community-based substance abuse prevention after-school program which uses cultural and performing arts activities to heighten and increase participants' awareness to the dangers of using and/or selling drugs, drinking alcohol and smoking. Project Images combines academics and the arts to foster character building and teach participants about the importance of being drug free. The program is offered at the following sites: Oswald Park and Recreation, 2220 NW 21 Avenue; Lauderdale Manors Elementary School, 1400 NW 14 Court; New Citrus Park Apartments, 765 NW 12 Avenue; and Driftwood Terrace Apartments, 3146 NW 19 Street.
- First Class Male is a teen pregnancy prevention program from a male responsibility perspective. It is an effort to refocus the needs of minority and disadvantaged families and direct greater attention and resources to the needs of adolescent males. First Class Male uses the School Board Approved First Class Male curriculum and after-school activities to enlighten adolescent males about their culture and historical consequences of irresponsible sexual behavior, as they make the transition into manhood. The program is offered at Lauderhill Middle School; William Dandy Middle School; Dillard High School and Fort Lauderdale High School.
- ABLE (Asset Building Leads to Excellence) is a community-based teen pregnancy prevention and youth empowerment project, designed to increase decision-making skills in preteen and young adolescent youth so they are able to resist engaging in high-risk early sexual activity, to reduce the rate of teen pregnancies and sexually transmitted diseases. The program is offered at William Dandy Middle School and Lauderhill Middle School.
- Seniors in Community Service program helps eligible low income seniors 55 years of age and older, acquire on the job training in subsidized employment.
- Center of Excellence is a community-based education support program designed to promote, encourage and motivate minority youth to explore and develop their full potential through academic achievement, self-awareness, career development and civic and community responsibility. The Center of Excellence is an integral component of the National Urban League's Campaign for African American Achievement.
- CWEP (Community Work Experience Program) provide a non-profit work place for Temporary Assistance for Needy Families(TANF) recipients as they prepare for their transition to the world of work. The program helps prepare the client for employment by providing a non-threatening environment in a non-profit arena. As clients are preparing for training or job search, CWEP provides an opportunity

## **Exhibit B**

to begin working and learning basic job skills without fear of failing.

- Neighborhood Services Coordination Project is a community revitalization initiative which promotes resident-led, grassroots efforts through the development of active neighborhood associations. Strategically designed to target high risk neighborhoods in Broward County, the program requests community input and action on the needs of its children and families and offers a coordinated, comprehensive array of needed support services. The program is offered at the Edgar J. Mills Center at 3150 Sunrise Boulevard.
- Black on Black Crime Prevention is designed to inform and educate the public about the extent and consequences of Black on Black crime and to assist local law enforcement agencies in their efforts to reduce crime, especially in high crime areas located in Broward County's Black community. The program is offered at Myer's Estates, 2411 NW 7 Street.
- SYETP (Summer Youth Employment and Training Program) is an intensive eight week program which strives to improve math and reading skills while teaching basic employability skills through work experience at public and private organizations in North, South and Central Broward. The program provides youth an opportunity to develop the tools required to successfully enter the job market. In addition to employment, the youth are exposed to career awareness training and peer counseling.
- Youth Employment and Training program provides, through assessment and case management, access to services of employment and training programs. The goal is to provide academic services, vocational training and workshops which will lead to full-time employment.
- ARTS(Arithmetic, Reading, Technology and Science) is a crime and substance abuse prevention program which targets elementary, middle and high school age girls. ARTS uses educational reinforcement and career awareness with an emphasis on science and math exploration to empower young girls with the knowledge and coping skills necessary to avoid the traps of substance abuse, violence, and other societal ills. The program is offered at the following schools: Martin Luther King Elementary, Sunland Park Elementary, New River Middle, William Dandy Middle, Dillard High, and Stranahan High.
- Community and Families is a community based initiative designed to address the primary needs of substance abuse prevention, family management and community involvement. Community and Families focus is to provide youth substance abuse prevention to program participants and their families, encourage community involvement by residents, and increase parent participation in school and community activities. the program operates at Glen Cove Apartments in Fort Lauderdale.

## **Exhibit B**

- Crime Prevention and Intervention is a community based initiative designed to inform, educate and assist the public on methods of reducing the rate of juvenile crime. With a wide array of services, the program serves as a deterrent to youth who are at risk of embarking on a life of crime. It is offered at the Urban League headquarters and at sunrise Middle School at 1750 NE 14 Street.
- 

### **Broward County Family Success Administration, 115 S. Andrews Avenue, Annex A-370, Fort Lauderdale, Fl. 33301**

- Self-sufficiency case management (Ladder to Success) provides assistance in obtaining job training, better paying jobs, child care. Low income families are eligible for the program. About 200 persons will be served annually. There is no waiting list.
  - Individual and family counseling, Life skills classes, including parenting, coping skills, anger management, assertiveness and time management. The program is open to any individual needing assistance and serves an average of 800 persons annually. There is a waiting list for counseling, but the size and wait time on the list varies.
  - Emergency assistance provides financial assistance for housing and utility payments, food, transportation. It is available to anyone with a drop in income, unemployment, or unexpected expenses. the program serves about 2000 persons per year and there is no waiting list.
  - Homeless services, Refugee Services provides case management, referral to jobs, shelter , parenting, health referrals and acculturation services for homeless individuals and families, including refugees.
- 

### **Broward House, 417 SE 18 Court, Fort Lauderdale, Fl.**

- Assisted housing, provide 32 beds for assisted living for HIV+ men and women 18 years and over. An average of 130 persons are served annually. There is a waiting list for the program which varies and the wait is about 1-2 weeks.
- Independent housing provides 3 apartment buildings in Broward County for individuals and families with children affected by HIV. The average number of persons served is 95 per year. There is a waiting list of about 20 people and the wait time varies from 2 weeks to over a year.
- Chemical dependency treatment program addressing addictions and HIV.

**Exhibit B**

People with and at risk for HIV are eligible for treatment. About 400 persons per year are served by this program. There about 6 people on the waiting list and the wait is about 1-2 weeks.

- Case Management is provided linking HIV+ individuals with needed services. The program is open to HIV+ men and women.
- 

**Gay and Lesbian Community Center, 1717 N. Andrews Avenue, Fort Lauderdale, FL. 33311**

- Slipping and Sliding, an HIV prevention-relationship workshop for gay males. This is a new program, with no waiting list.
  - Positive Immunity, an HIV/AIDS Spiritual Awareness Workshop. Serves about 240 persons per year, with about 10 people on the waiting list. The average time on the waiting list is 4 weeks.
  - Anonymous HIV Testing, free testing for anyone. They test about 500 people per year.
- 

**Barriers to Affordable Housing**

The City is required to include a discussion of barriers to affordable housing in its 5-year Consolidated Plan. The discussion must explain whether the cost of housing or the incentives to develop, maintain, or improve affordable housing in the jurisdiction are affected by public policies, particularly by policies of the city, including tax policies affecting land and other property, land use controls, zoning ordinances, building codes, fees and charges, growth limits, and policies that affect the return on residential investment.

We have reviewed the public policies affecting the development of affordable housing, including affordable housing for special needs populations, and have identified only one zoning regulation which affects the development of affordable housing. No policies were identified which affect the return on residential investment. The zoning regulation identified is the City's zoning for Social Service Residential Facilities (SSRF).

Over one-third of the social service organizations surveyed by the City for its Consolidated Plan cited zoning as a problem or an obstacle to providing needed housing. The City's zoning ordinance covering various types of transitional housing and support services for special needs populations is restrictive and needs to be reviewed to determine the extent to which it is an impediment to the development of special needs

## **Exhibit B**

housing. However, the City Commission does recognize the need for support services and transitional housing. At the City Commission meeting of January 4, 2000, the Commission discussed Social Organization funding needs and priorities, and a tape of the discussion was played for the Community Services Board, a City advisory board charged with reviewing social and community development types of funding. A copy of the zoning ordinance for SSRFs is included as Appendix D, as well as the minutes from the 1/4/00 commission meeting and the January 10,2000 Community Services Board meeting.

The City will be reviewing these zoning regulations over the next five years to determine the extent that it restricts the development of affordable housing and support services for special needs populations. A series of workshops will be held with social service providers as well as the community and public officials to try to resolve any real or perceived problems with the zoning rules.

The City development an Affordable Housing Incentive Plan, in conjunction with its State Housing Initiatives Partnership (**SHIP**) funding. The SHIP Act, which became effective August 1, 1992, requires that before a city may participate in this program it must first adopt an affordable housing ordinance and appoint, by resolution, a nine-member advisory board specifically charged with making recommendations to the City Commission on affordable housing incentives which could be implemented in order to reduce the cost of developing affordable housing. The City adopted its affordable housing ordinance, C-93-20, on February 18, 1992. The Affordable Housing Advisory committee was appointed by Resolution 93-71 on April 20, 1993. The Fort Lauderdale City Commission accepted the Committee's recommendations at it December 7, 1993 Conference Meeting, and directed staff to develop the required incentive plan. The Incentive Plan was adopted by the Commission and submitted to the State by February 18, 1994.

The City's SHIP Affordable Housing Incentive Plan proposes two specific initiatives which have been implemented. The first incentive was the adoption of a policy to provide infrastructure support for affordable housing developments on a case-by-case basis. The City has already provided this type of support for four affordable housing development projects: (1) City View, a 130-unit townhouse development project; (2) Regal Trace, a 408-unit rental project; Dorsey Heights, a 35-unit single-family infill housing development project; and Lincoln Palms, a 10-unit single-family infill housing development project.

The second initiative is adoption of an affordable housing incentive ordinance which will incorporate various incentives to encourage and reduce the cost of the development of affordable housing. A series of 5 workshops were held to discuss various issues that could be translated into affordable housing incentives. The workshops were designed to educate both the public and private sector, and were conducted by knowledgeable professionals in the academic and housing fields.

## **Exhibit B**

A City Ordinance was developed out of this process, C-99-70, Section 9, which was adopted by the City Commission on December 21, 1999. The ordinance, "Affordable Housing Program", provides that: "Funds shall be made available to offset a portion of the development fees incurred in connection with the development of affordable housing. In order to be eligible for funding under this section the following requirements must be met:

- (1) An application for the proposed development is submitted on or after the effective date of the ordinance from which this article is derived.
- (2) The development consists of one or more single-family or multifamily dwellings as defined in the ULDR.
- (3) The development qualifies as affordable housing as defined in this article.
- (4) The purchaser or lessee of the development is an eligible person or eligible household as defined in this article.
- (5) A restrictive covenant is executed and recorded in the public records of Broward County, Florida, restricting the ownership of an owner qualified development to an eligible persons for five (5) years and lease of multifamily dwellings to a qualified lease development to an eligible person for fifteen (15) years.
- (6) Single-family standard development must meet the standards established for an infill housing project approved by the City Commission on July 6, 1994."

The Ordinance also provides for an expedited review process. An application for development permit which has received a preliminary qualification by the designated City department shall be identified for expedited development review processing. Expedited processing includes: (1) identification of zoning regulations applicable to the proposed development; (2) oversight of the development will be conducted from application to certificate of occupancy; (3) referral to the appropriate Broward County government and Broward County School Board affordable housing expeditors who have jurisdiction over proposed developments in the City; (4) assist the applicant with any incomplete portions of the development application; and (5) identify resources which may assist the applicant in meeting the requirement for development permit approval. The City has identified a position in the Planning and Economic Development Department as the economic development expeditor who will have the responsibility for expediting applications in accordance with the Ordinance.

A copy of the Ordinance is included as Appendix C. The City has set aside SHIP funds to be used to fund this incentive.

## **Fair Housing**

**Exhibit B**

The City hired a consultant to prepare An Analysis of Impediments to Fair Housing in 1997, which included a recommended plan of action to overcome identified barriers. Based on those recommendations, the City has developed a Fair Housing Action Plan, which is included as Appendix F.

The City encourages the support of fair housing and has in place a fair housing plan to affirmatively further fair housing. The City has revised its fair housing plan to include some of the actions recommended in the Impediment Study.

The City encourages the support of fair housing and has in place a fair housing plan which includes advertising on public access tv, radio, and in local newspapers, as well as coordination of educational programs for the public and participants in the housing delivery system, including lenders, Realtors, appraisers, and landlords. All contracts with subgrantees require that anyone receiving federal funds comply with fair housing laws, and the HCDD uses the HUD Fair Housing Logo on its housing applications and brochures.

The City, for the first time has set aside public service funds from its CDBG program to fund fair housing activities through local nonprofit fair housing organizations. It is anticipated that this relationship will allow the City to refine and improve its fair housing efforts over the next five years.

**Anti-Poverty Strategy**

According to the 1990 Census, the majority of the City of Fort Lauderdale's employed residents work in the service or retail trade sectors (61%). These jobs are typically semi-skilled or unskilled, and the wages are lower than for typical manufacturing or skilled and professional jobs. While these service and retail jobs are necessary in the City's tourist-based economy, it is in the City's interest to try to attract better paying jobs to the City. In order to try to accomplish this, the City established an Economic Development Department, which actively recruits new businesses. However, it is also necessary to retain and expand existing businesses, particularly in distressed neighborhoods.

The City recognizes the need for economic revitalization in its neighborhoods, and has undertaken an aggressive approach to creating and retaining jobs for low and moderate income persons. One effort was to renovate a closed school for use as a job training and creation facility. The facility housed 6 tenants, and created 64 jobs. The facility is now providing job training through various non-profit organizations, and is exploring the viability of more dynamic commercial uses.

In addition, 5 acres are assembled along N.W. 7 Avenue, between N.W. 4 and 6 Streets, for reuse as a commercial site. The City is currently exploring the development of an Entertainment Complex, which would spur redevelopment along Sistrunk Boulevard, the main commercial corridor in the minority community. The City is also

**Exhibit B**

developing plans for a technology park. The jobs created will be for lower income persons, and hopefully will serve as a new employment center for area residents.

The City has a facade treatment program and a business loan program to assist area businesses. Both loan program funds leveraged private sector funds in the 1998-99 program year, spurring economic development in the area.

The City funds an alternative to school suspension program, designed to decrease the number of dropouts, since a high school education is key to future economic success. And, as a Weed and Seed participant, provides services to area residents at its Safe Haven Site at the Mizell Center for job training, child care, family counseling and coordination of social services to ease the welfare-to-work transition.

The City has funded child care subsidies for the past three years, and will continue to fund them over the next 5 years. One of the persistent needs of economic revitalization is the provision of child care subsidies. Without quality, affordable child care, even the most motivated employee can not be self-sufficient. Child care in facilities with certified teachers costs between \$75-95 per week. Infant care is at least \$35 per week higher. A single-parent employee earning \$8.00 per hour, working a full 40 hour week, only earns \$320 per week, with a net of approximately \$272 (15% less). If one child is at a child care center at \$75 per week, the household would be left with \$197 per week or approximately \$788 for a four week period. If they are renting a one-bedroom apartment for \$450, they are left with only \$84.50 per month for everything else -- food, transportation, insurance, utilities, clothing. A child care subsidy would at least give this household an income nearer to a livable wage. However, if the single parent has two children, then the parent could not afford to work, unless they could find a job paying at least \$10 per hour.

Finally, the City has a State-approved Enterprise Zone program to encourage development of businesses in the zone and employment of residents of the zone and an approved Community Redevelopment Area (CRA) for targeted development and revitalization. Tax increment financing will be available to compliment federal funding in this area. The City will continue to explore ways to use its federal dollars in partnership with other local agencies, to increase job opportunities for lower income persons.

**Coordination of Efforts**

The City uses its federal funds to leverage private sector participation in housing and economic development program. Several successful initiatives are underway, including purchase assistance, housing recovery, and commercial facade. The City supports the receipt of other federal funding that may become available over the next five years, including but not limited to the following: HOPE I; HOPE II; HOPE III; Shelter Care Plus; Section 202 (elderly); Section 811 (persons with disabilities); SAFAH; Transitional Housing; Moderate Rehabilitation for SROs; and Housing Opportunities for Persons with AIDS.

## **Exhibit B**

Additionally, the City supports the receipt of state housing funding, including but not limited to: SAIL program; mortgage revenue bond programs; weatherization programs; rehabilitation assistance for target groups, and tax credits for developers.

The private sector will provide support for housing development through such means including, but not limited to: technical assistance, construction and mortgage loans.

### **Overcoming Financing Gaps**

The City tries to develop community and economic development, and housing programs which leverage federal or state dollars at least 3 to 1. Currently, this is accomplished through small business loans, purchase assistance and infrastructure development.

The business loan program provides 20% of the total project costs to establish or expand a business in a targeted area, with the remaining 80% of the funding coming from private lenders and investors. The federal funds are provided through the CDBG program in the form of a low interest loan.

## **Exhibit B**

The purchase assistance program provides \$3,000 to purchasers of existing single-family homes and \$15,000 to purchasers of newly constructed single-family homes, leveraging private mortgages for the purchase of the new homes.

Infrastructure improvements are provided to targeted development activities to bring down the cost of financing private development. City View was the latest public-private venture to provide gap financing to encourage development.

**CITY OF FORT LAUDERDALE**  
**RENTAL REHABILITATION PROGRAM SUMMARY**

PROGRAM GUIDELINES AND INFORMATION

The Rental Rehabilitation Program is designed to increase the supply of standard, rental housing by encouraging investors to renovate existing rental units that will be made available to low and moderate-income renters. The Program provides rental property owners a loan of up to one-half of the rehabilitation costs necessary to bring the dwelling up to standard condition. Qualified property owners receive 20-year, 0% interest loans. Payments are deferred during the first 10 years in order to allow the investor to structure the terms of any required private financing during the deferred period of the City loan.

ELIGIBILITY REQUIREMENTS

1. The property must contain one or more rental units. Preference will be given to properties, which contain two bedroom or larger units.
2. The borrower must be the owner of the property at the time of loan closing.
3. The after-rehabilitation proposed rents must be affordable to low and moderate-income families. Affordability in this case is defined as rents that do not exceed current Section 8 Fair Market Rents, as set by HUD on an annual basis.
4. The project must be economically feasible at market rents for the Fort Lauderdale Metropolitan Statistical Area.
5. Existing lien payments must be current.
6. Taxes and insurance must be current.
7. The City must be able to obtain a clear first or second lien position.
8. Multi-family properties must not contain more than 50 units per building.
9. At a minimum, eligible rehab costs must average \$5,000.
10. For 12 or more HOME-assisted units, prevailing wages in the City will be paid as predetermined by the Secretary of Labor and pursuant to the **Davis-Bacon Act** [40 U.S.C. 276A-5].

In addition to the points outlined above, City staff will review proposals based on the security offered to the City. A higher priority will be given to projects with a low debt-to-value ratio, first lien position for the City, additional cash investment by the owner, two and three bedroom unit mix, projects requiring minimal, temporary and/or permanent displacement of existing residents and projects that show a positive cash flow at 85% occupancy.

## PROGRAM FEATURES

### 1. Financing

The Rental Rehabilitation Program is designed as a 20-year interest-free loan with deferment of principal payments for the first 10 years. In year 11, principal payments begin and are paid in equal installments for the next 10 years.

The rehabilitation will be financed by two components. A minimum of 50% of the total rehabilitation costs must be financed by the owner who is responsible for securing all funds for his/her portion of the rehabilitation costs. The owner may utilize private sources available (may include cash injection by owner). The owner must keep in mind the maximum loan-to-value ratio in Item 2a below. The City's rehab funds will provide the remaining portion of the cost of rehabilitation subject to the maximum limits listed in Item 3 below. If the owner is utilizing debt financing as the private source of funds, the owner is encouraged to work concurrently with the City and the lender in preparing a loan package, so that loan amounts, appraisals and title searches may be shared. Simultaneous closings can, and are encouraged to, be arranged.

### 2. Underwriting Criteria

The underwriting criteria to be utilized for Rental Rehabilitation Program applications include the following:

- a. Total liens, including the Rental Rehabilitation Program lien, cannot exceed a maximum loan-to-value ratio of 80% of the after rehabilitation appraised value.
- b. The property must show a positive cash flow at 85% occupancy. Rental property operating expenses will be analyzed using historical data of the property, average costs figures determined by the Broward County Property Appraisers Office in its annual Income and Expense Analysis Report, or any other market survey information that the City may determine accurately reflects rental operating expenses.
- c. The owner must provide an MAI, SREA, SRA or other form of appraisal acceptable to the City. The City may order this for the owner from an appraiser under City contract. These costs are to be paid by the owner prior to or at closing.
- d. A title search of the property will be required. The City will order this, with the cost paid by the owner prior to or at closing.
- e. Mortgage, deposits, taxes and insurance will be verified as accurate and current.
- f. The City must be able to obtain at least a clear second lien position, which is supported by a title policy.
- g. For projects of 10 units or more, resumes of owner(s) and management company personnel will be required to verify the experience of all parties.
- h. The owner's matching funds must be identified and put in escrow prior to closing.

## Exhibit C

- i. Partnership Agreements filed with the Secretary of State listing all partners and amount of their personal share in the partnership are required. Corporations will be verified through the Secretary of State, and a list of all directors, shareholders and board members are required and will be reviewed.
- j. Disclosure of pending lawsuits, foreclosures or bankruptcies is required.
- k. A construction contract must be in place for a fixed price, and with a designated completion date, prior to Loan Committee review.
- l. Payment and Performance Bonds is required for the entire amount of the project construction cost when in excess of \$100,000. Provided, however, where other guarantees protect and assurances are provided to the City and are deemed as acceptable, the City may waive this requirement on projects under \$100,000. The City may also waive Payment and Performance Bonds on a case-by-case basis and in instances where City funding is not provided until after project completion, inspection, and acceptance.

### 4. Maximum Loan Amount

The maximum loan limit on the City's portion will be the **lesser** of:

0-1 Bedroom Unit	-	\$10,790.
2 Bedroom Unit	-	\$12,450.
3+ Bedroom Unit	-	\$14,110.

OR

50% of the eligible rehabilitation cost

### 5. Eligible Costs

Eligible costs are defined as:

1. Actual rehabilitation costs, at a minimum, to bring the property into compliance with applicable City codes including security and smoke alarm requirements;
2. Energy conservation-related improvements;
3. Costs associated with the removal of architectural barriers for handicapped persons;
4. Soft costs related to the rehabilitation including, but not limited to: building permit fees, architectural, engineering, or related professional service fees. NOTE: Private lender origination fees, credit report fees, fees for title evidence, filing and recordation fees, attorney's fees, private appraisal fees, and disbursement fees are NOT eligible.

This is a summary only. Please refer to Rental Rehabilitation Program application for all program requirements.