

August 10, 2023

Colleen Turner  
Senior Manager  
Charlotte County Human Services  
1010 Loveland Blvd  
Punta Gorda, FL 33980

RE: SHIP Non-Profit Special Needs Rental  
Project: William Place (216 West William Street, Punta Gorda, FL 33950)  
Applicant: Goodwill Industries of Southwest Florida, Inc.

Dear Ms. Turner

Attached please find one signed copy of the SHIP Non-Profit Special Needs Rental funding application. Goodwill is requesting funding to do critical repairs at William Place - a rent restricted HUD Section 811 property serving special need residents.

The last funding received from Charlotte County for this specific property was over 15 years ago. These new funds are critical in order to sustain this property as an affordable housing option for special need residents.

We appreciate this opportunity for submitting this funding application and if funded, we look forward to working along side your staff on this worthwhile project.

Sincerely,



Carolyn Johnson  
Senior Vice President and Chief Mission Officer

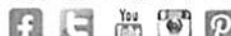
**Mission:**

*Goodwill Industries of Southwest Florida is committed to serving people with disabilities and disadvantages by offering life-changing opportunities to achieve independence.*



5100 Tice Street Fort Myers, FL 33905 Phone: 239-995-2106 Fax: 239-652-1654 TTY: 239-995-9207

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





**Charlotte HOME**  
(Housing Opportunities Made Easier)  
SHIP Non-profit /Low-Income/Special needs Rental

Office Use Only:

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

Scoping Meeting Date: \_\_\_\_\_

☒ RENTAL

☒ SPECIAL NEEDS/SUPPORTED LIVING

☒ Multi-family

☐ Single Family

☐ Other

\*An officer, owner, partner or sole proprietor of the Company applying must sign this form\*

Applicant Name/Address: Goodwill Industries of Southwest Florida, Inc. (5100 Tice Street, Ft. Myers, FL 33905)

Property Name/Address: WILLIAM PLACE: 216 West William Street, Punta Gorda, FL 33950 (Unit 111, 112, 113, 114, 211, 212, 213, 214, 215, 311, 312, 313, 314 - one of the units listed is the community room.)

Applicant phone: 239-995-2106

Email: [carolynjohnson@goodwillswfl.org](mailto:carolynjohnson@goodwillswfl.org)

Is the applicant a: ☒ Non-profit (attach current IRS designation as 501(c)(3))  
☐ Community Land Trust

Subject Property Tax ID Number: 412-307-131-002

Property Acreage: 1.2 acres

Legal Description of proposed property: See attached

Total number of units on property 12 Number of units proposed for rehab 12

Average resident income: ☐ 60-80% AMI ☐ <60% AMI ☒ (Equal to or less than 50% AMI)  
Rent restricted to 30% of household income. Income restricted to 50% or less AMI household income.

Proposed rental rates: \_\_\_\_\_

Existing Land Use Restriction Agreement (LURA) on property ☒ Yes ☐ No

Term of Affordability: ☐ Perpetuity ☐ 50 years ☐ 21-49 years ☒ (40 years with expiration in 2041)

Incentives Requested (check only those that apply):

☐ Expedited Permitting ☐ Impact Fee Waiver ☐ Utility Fees ☐ Density ☒ (None)

Signature: Carolyn A. Johnson Date: 8/10/2023

Funding/Incentive awards subject to availability.

See page 2 for additional required information.

## **SHIP Non-Profit/Low Income Special Needs Rental - Additional Required Information**

### **Describe the Scope of the Project Including all Hurricane-Related Repairs**

In 2001 Southwest Florida GVI Housing VI, Inc. (a single asset/single purpose corporation formed by Goodwill Industries of Southwest Florida) received approximately \$847,000 in HUD Section 811 funds to construct 12 total units (ten one bedroom and two, two bedroom) of supportive housing for persons with disabilities who have household incomes defined as very low. The project is located at 216 West William Street, Punta Gorda, Florida, 33950.

Each apartment is approximately 485-626 square feet and contains a kitchen complete with a front-control range, refrigerator, range hood, pantry and ample storage. The unit is designed to maximize a variety of furniture placement options, while providing ample space for living, eating, sleeping and cooking functions. All units and all common areas are fully handicap accessible. Exterior and interior community space is provided in the form of a community room and outside area. The communal areas have been designed to maximize resident interaction amongst each other, as well as amongst friends, staff, and visitors.

On behalf of Southwest Florida GVI Housing VI, Inc., Goodwill Industries of Southwest Florida is requesting \$359,647 in Charlotte County SHIP funds for Special Needs Housing for capital improvements to upgrade the property and enhance resident living, reduce energy costs for both residents and the project, improve safety and security for residents, and reduce long-term operating costs. Attached is a quote from the contractor. The following is a summary of the proposed improvements:

<u>Item</u>	<u>Amount</u>
Roof (energy efficient and hurricane resistant)	\$200,118
Windows (energy efficient and hurricane resistant)	\$ 28,800
Surveillance cameras on exterior	\$ 17,626
Appliances (refrigerator, range, range hood, water heater, HVAC)	\$ 83,103
GC overhead and profit	\$ Incl
Administrative/legal	\$ 30,000
Total	\$359,647

It should be noted that whenever Goodwill undertakes renovations, they do so with the goal of reducing energy costs to both the residents and project. For this project, energy efficient upgrades will occur in the metal roofs, windows, refrigerators and HVAC systems.

In addition to energy efficient upgrades, several renovation items focus on the resident safety and security. Goodwill has found that special need residents often need additional safety and security enhances in order to make them feel safe in their homes. Hurricane resistant windows and roofs will help prevent damage from future storms. Surveillance cameras provide residents will an

additional security outside of their units.

Although the rents and operations are subsidized by HUD, the funding provided has not allowed the Owner to properly fund the Reserve for Replacement account to keep pace with long term capital replacement items. These capital replacement items have increased at a pace which is greater than HUD allows for. Although the Owner has petitioned and has received periodic rent/operational budget increases, these increases have only allowed the Owner to keep pace with day-to-day management and not long term capital improvements. As a result of these factors, the Owner is in need of supplemental funding to proceed with required capital replacement items.

It should be noted that none of the above listed repairs are “hurricane” related, nor has the Owner requested insurance funds to pay for any of these items.

#### Outline Project Readiness (Site Control, Zoning, Construction Timeline etc)

The property has been in operation since 2002 and is currently 100 percent occupied. All the applicable local codes were met when constructed and the property continues to be compliant with all applicable codes today.

With respect to the schedule, there are two distinct elements. First, Goodwill will need to secure the approval from HUD, given that the property will have an encumbrance associated with Charlotte County’s grant. Goodwill anticipates this process will take 60 to 90 days from issuance of draft agreements from Charlotte County. Upon approval of HUD and execution of required documents, Goodwill anticipates approximately 90-120 days to pull permits and complete the work. It should be noted that Goodwill has already procured quotes for this work (see attached) and this will speed pre-construction scheduling.

#### Identify Other Funding Sources for the Project

Although the rents and operations are subsidized by HUD, the funding provided has not allowed the Owner to properly fund the Reserve for Replacement account to keep pace with long term capital replacement items. These capital replacement items have increased at a pace which is greater than HUD allows for. Although the Owner has petitioned and has received periodic rent/operational budget increases, these increases have only allowed the Owner to keep pace with day-to-day management and not long-term capital improvements. As a result of these factors, the Owner is in need of supplemental funding to proceed with required capital replacement items.

No other funding will be used except SHIP funds.

### Disclose Any Existing Liens, mortgages or Other Encumbrances on the Property

This project was initially financed with HUD Section 811 funding. This funding restricted the use of the multi-family property for special need residents. Resident household incomes must be at or below 50 percent of the average median income for the area and residents rent cannot exceed 30 percent of their household income. A forty year HUD mortgage was entered into on 2001 and expires in 2041.

### Describe Property Development/Management Experience

Goodwill Industries has a history of providing affordable housing to special need residents. It began as simply a referral process offering one-on-one support, to the development of 16 affordable housing projects. Goodwill, and its management agent (Columbia Property Group), enjoy a close working relationship with HUD and its properties continually receive high HUD scores with respect to both property maintenance and management.

The following is a brief summary of the projects which Goodwill has developed.

- *Park Villas – N. Ft. Myers, Section 811 (066-HD022):* This is a 16 unit complex for persons with physical disabilities, which includes the elderly. Goodwill paid for off-site sewer/water/roads to develop this tranquil site. The project has proceeded through HUD final closing and is now 100 percent occupied. Goodwill employs an on-site manager to operate the project. Goodwill was able to garner the support of the local government and local foundations to pay for up-grades to the project and reduce impact fees.
- *Laurel Oaks – Cape Coral, Section 811 (066-HD029):* This is a 12 unit project consisting of one and two bedroom units. This project has proceeded through HUD final closing and is now 100 percent occupied. This project is for special need persons. Goodwill creatively used several duplex lots and worked diligently with the city to produce an efficient and attractive apartment project. Goodwill needed to obtain a variance for the construction of this project. This was obtained quickly and efficiently.
- *Broadway Place – Ft. Myers, Section 811 (066-HD042):* This 12-unit project is complete. Goodwill escrowed \$25,000 of its own funds to connect to/bring water/sewer to the site. Although the site work was quite complex, Goodwill oversaw its successful development. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Glendale Village – Lehigh Acres, Section 811 (066-HD044):* This project represented the first housing for any special needs populations in this western rural area of Lee County. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Santa Barbara Village – Cape Coral, Section 811 (066-HD045):* This was the second

project for special need persons in Cape Coral. The project has proceeded through HUD final closing and is now 100 percent occupied.

- *William Place – Punta Gorda, Section 811 (066-HD046)*: This 12-unit project is the first special needs housing project to be developed in Charlotte County. The project's central location and proximity to downtown ensures easy access for the disabled and the elderly. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Ohio Place – Ft. Myers, Section 811 (066-HD048)*: This is a 15-unit duplex project constructed within a minority community in Ft. Myers. The design of this project was unique, in that it consisted of individual duplex buildings, which maximized disabled residents integration into the neighborhood. The project is complete and 100 percent occupied.
- *Hatton B. Rogers Apartments – N. Ft. Myers, Section 202 (066-EE081)*: This is a 54-unit HUD 202 elderly project located adjacent to an existing HUD 811 sponsored by Goodwill and also adjacent to a Goodwill store, County park, and County Library. This project was supplemented with \$154,000 of County funds. These funds went to improve and enhance the project's design. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Coronado Place – Cape Coral, Section 811 (066-HD049)*: This is a 12-unit apartment complex located in the downtown area of Cape Coral. To make this project happen, the City provided \$60,000 and the Sponsor added \$20,000 of their own funds. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *The Pines – N. Ft. Myers, Section 811 (066-HD053)*: This is a 14-unit apartment complex located within a block walking distance of a grocery store and shopping center. Goodwill purchased the site in advance of the HUD funding notification, which demonstrates the Goodwill's willingness to spend capital funds and take risks when seeking HUD 811 funding. The County contributed \$420,000 in supplemental funding on this project. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Harbor Place Apartments – Pt. Charlotte, Section 811 (066-HD055)*: This is a 14-unit apartment complex located adjacent to an existing store. This location provides residents with employment opportunities. Goodwill received \$200,000 in supplemental funding from Charlotte County. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Country Cove Apartments – Lehigh, Section 811 (066-HD056)*: This is a 14-unit apartment complex is located within a quiet residential community and near to shopping and services. This location provides residents with employment opportunities. Goodwill purchased the site in advance of the HUD funding notification, which demonstrates the

Goodwill's willingness to spend capital funds and take risks when seeking HUD 811 funding. Goodwill obtained \$307,000 in supplemental funding from the County, as well as bonus density waivers to allow for the development of this project. The project has proceeded through HUD final closing and is now 100 percent occupied.

- *Palmetto Ranch – Labelle, Section 811 (066-HD057):* This 14-unit development is the first of its kind providing permanent housing for the disabled of Labelle. The facility is part of a neighborhood renovation project which includes a store and a second phase Section 811 project. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Palmetto Ranch II – Labelle, Section 811 (066-HD058):* This is 14-unit development represents Phase II to a multi-million dollar investment Goodwill made in this qualified Community Development Block Grant area. The project has proceeded through HUD final closing and is now 100 percent occupied.
- *Jean Devereaux Apartments - N Ft. Myers, Section 811 (066-HD062):* This is a 14-unit duplex project constructed within unincorporated Lee County. The design of this project was unique, in that it consisted of individual duplex buildings, which maximized disabled residents integration into the neighborhood. The development was built to meet green standards per Florida Green Building Coalition (FGBC) The project is complete and 100 percent occupied.
- *Sweetwater Place Apartments - Labelle, Section 811 (066-HD061):* This is a 14-unit duplex project constructed within unincorporated Lee County. The design of this project was unique, in that it consisted of individual duplex buildings, which maximized disabled residents integration into the neighborhood. The development was built to meet green standards per Florida Green Building Coalition (FGBC) The project is complete and 100 percent occupied.

#### Describe Any Past or Present Litigation Involving the Properties Managed

None of the properties listed currently have nor have ever been subject to litigation. All the properties meet current HUD program guidelines and consistently receive high scores for both management and property maintenance.

#### Services and Programs Offered to Residents

HUD Section 811 funding is termed independent/supportive living housing. This means that in order for residents to live independently, they need supportive services. The services provided

are individual in nature and vary from resident to resident. The following table highlights the type of services and programs that residents have access to.

Strategy	Description	Program
Strive to improve independent living	Accessible transportation	Property manager and local case managers connect residents with Charlotte County Transportation Disadvantaged Program (TD). This door to door assists residents without a car or other method of transportation.
Strive to improve independent living	Assistance with technology to help residents to communicate	Property manager and local case managers connect residents the Center for Independent Living Gulf Coast (CIL) and/or Lighthouse of Southwest Florida. Both offer assistive technology program
Strive to improve independent living	Assist residents in employment training and job placement	Residents have access to a variety of Goodwill programs which include the Community Resource Center, Mobile Community Resource Center for residents who are transportation challenged, Digital Skills Training and Certification, Digital Navigator, Pathways to Work, and MicroEnterprise Program. For residents with a specific disability, they can access employment programs offered by CIL.
Strive to improve independent living	Life skill training for individuals with specific types of disability.	Depending if a resident has visual, hearing, or developmental challenges, Goodwill partners with several nonprofits who offer life skill training. These include CIL, and Lighthouse of Southwest Florida.

Strive to improve independent living	Support resident case manager	Many of the residents of this project have individual case manager. These vary by the residents disability. Property manager seeks to assist individual case managers by communicating project specific requirements, changes, policies etc. In addition, property managers work with both residents and their case managers on hurricane preparation guidelines and standards. Lastly, the property manager has access to a plethora of supportive services offered by Goodwill. These services are communicated to both the resident and their case manager.
Encourage integration and inclusion into the community at-large	Design projects to mimic local housing type, while at the same being fully handicap accessible.	Goodwill used a duplex-style development which integrates the housing into the neighborhood and retain the single family flavor and makes it difficult to distinguish this housing or its residents from its neighbors. This concept was successfully used by Goodwill at other special need projects.
Off-site amenities and recreational activities	Affordable housing projects serving special need residents should be located within close proximity to essential services needed to encourage independent living.	Goodwill strives to locate housing within close proximity to services residents need. Within one mile of the project include post office, ten dentists, ten doctors, three pharmacies, one grocery store, two department stores and four banks. Within 1.25 miles is a public library.

#### Describe Plan for Tenant Relocation During Rehabilitation

Goodwill has completed over \$1.6 million in renovations on 14 of its 16 existing projects. The scope for these renovations are similar to that of William Place. In the past, the management company has worked closely with the residents, construction company, and Goodwill to prevent the overnight relocation of residents. The most disruptive work scope element will be the windows and water heaters. We anticipate that this work can be completed in one day. In this case, residents will vacate their apartment for the day and return home that evening at 5pm. For the day, they will have the option of staying with friends/friends, utilizing the on-site community room at the property, or staying at a nearby Goodwill facility.

**Revised Scope of Work**  
**Goodwill Industries of SW Florida - William Place**

<u>Item</u>	<u>Amount</u>
Roof (energy efficient and hurricane resistant)	\$200,118
Windows (energy efficient and hurricane resistant)	\$ 28,800
Surveillance cameras on exterior	\$ 17,626
Appliances (refrigerator, range, range hood, water heater, HVAC)	\$ 83,103
GC overhead and profit	\$ Incl
 Total	 \$329,647

Other Information (including special needs criteria if applicable)

Residents of William Place must have a documented physical or developmental disability. Goodwill finds that most all residents are currently receiving Social Security Disability Income (SSDI). They must also meet the income criteria, as set forth by HUD. Their household income is re-certified annually.

Additional information, which is attached at the end of this narrative section includes;

- Legal description of property
- General contractor quote for work proposed
- Tax record for property

**Attachment A**  
**Legal Description**

**APPENDIX "A"**  
**SOUTHWEST FLORIDA GWI HOUSING VI, INC.**  
**HUD Project No. 066-HD046**

**LEGAL DESCRIPTION**

**A parcel of land in Block 79, TRABUE, a subdivision as recorded in Plat Book 1, Page 23 of the Public Records of Charlotte County, Florida; said parcel of land being more specifically described as follows: From a concrete monument at the intersection of the Southeasterly right of way line of Helen Avenue and the Northerly right of way line of William Street as platted in said subdivision of TRABUE, said point also being the most Westerly corner of Block 79, of said subdivision of TRABUE; thence, North 89°59'09" East along said Northerly right of way line of William Street, a distance of 314.28 feet to the point of beginning; thence, continue North 89°59'09" East, along said Northerly right of way line, 503.78 feet; thence North 41°54'10" West, along a line 37.22 feet Southwesterly of and parallel with the Southwesterly right of way line of Harvey Street a distance of 141.04 feet; thence South 89°59'09" West, along a line 105.00 feet Northerly of and parallel with the said Northerly right of way line of William Street a distance of 419.85 feet; thence, South 48°05'50" West, a distance of 62.48 feet to the Northeasterly right of way line of Gill Street; thence South 41°54'10" East, along said Northeasterly right of way line of Gill Street a distance of 85.00 feet to the point of beginning. Said parcel of land being more specifically described as follows: Lots 1,2,3,4,5,6, BLACKMON SUBDIVISION, according to the plat thereof, recorded in Plat Book 13, Page 24 of the Public Records of Charlotte County, Florida.**

Attachment B  
Construction Quote

**Insured:** Williams Place Apartments  
**Business:** 216 West Williams St  
Punta Gorda, FL 33950

**Claim Number:****Policy Number:**

**Type of Loss:**

Date of Loss:  
Date Inspected:

Date Received:

Date Entered: 8/4/2023 11:04 AM

Price List: FLM8X\_01JUN23  
Restoration/Service/Remodel  
Estimate: WILLIAMS\_PLACEJH

Estimate: WILLIAMS\_PLACEJH

## WILLIAMS\_PLACEJH

### Appliances

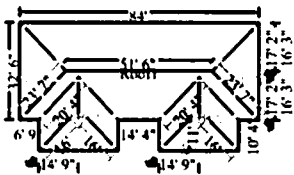
DESCRIPTION	QTY	REMOVE	REPLACE	TAX	O&P	TOTAL
1. R&R Refrigerator - top freezer - 14 to 18 cf	12.00 EA	53.28	731.68	546.00	996.56	10,962.08
2. R&R Water heater - 40 gallon - Electric - 6 yr	4.00 EA	92.00	900.00	139.00	410.70	4,517.70
Replacement of 4 Hot Water Tanks						
3. R&R Range hood	12.00 EA	20.11	235.69	101.38	317.10	3,488.08
4. R&R Range - freestanding - electric - Standard grade	12.00 EA	32.17	696.64	468.00	921.36	10,135.08
5. HVAC Split Unit Replacement	12.00 EA	0.00	4,500.00	0.00	0.00	54,000.00
Totals: Appliances				1,254.38	2,645.72	83,102.94

### Exteriors

DESCRIPTION	QTY	REMOVE	REPLACE	TAX	O&P	TOTAL
6. R&R Surveillance system - cameras, monitors, etc.	3.00 EA	239.74	4,897.89	610.30	1,602.32	17,625.51
7. Pre-Hung Window Impact Rated	36.00 EA	0.00	800.00	0.00	0.00	28,800.00
Totals: Exteriors				610.30	1,602.32	46,425.51

### Main Level

#### Roof



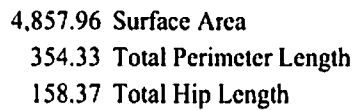
3,487.64 Surface Area	34.88 Number of Squares
274.33 Total Perimeter Length	78.17 Total Ridge Length
158.37 Total Hip Length	

DESCRIPTION	QTY	REMOVE	REPLACE	TAX	O&P	TOTAL
8. Remove Tear Off Metal roofing	3,487.64 SF	0.80	0.00	0.00	279.02	3,069.13
9. Re-nailing of roof sheathing - complete re-nail	3,487.64 SF	0.00	0.38	2.27	132.76	1,460.33
10. Ice & water barrier - High temp	3,487.64 SF	0.00	2.66	181.36	945.86	10,404.34
11. R&R Drip edge/gutter apron	274.33 LF	0.53	4.00	24.96	126.78	1,394.45
12. R&R Valley metal - (W) profile	81.37 LF	0.93	9.13	17.56	83.62	919.76
13. Metal roofing	3,487.64 SF	0.00	9.04	473.80	3,200.20	35,202.27

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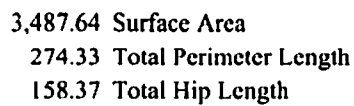
Totals: Roofl	916.94	5,391.96	59,310.89
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Totals: Roof2	1,244.39	7,408.80	81,496.30
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**CONTINUED - Roof3**

DESCRIPTION	QTY	REMOVE	REPLACE	TAX	O&P	TOTAL
26. Remove Tear Off Metal roofing	3,487.64 SF	0.80	0.00	0.00	279.02	3,069.13
27. Re-nailing of roof sheathing - complete re-nail	3,487.64 SF	0.00	0.38	2.27	132.76	1,460.33
28. Ice & water barrier - High temp	3,487.64 SF	0.00	2.66	181.36	945.86	10,404.34
29. R&R Drip edge/gutter apron	274.33 LF	0.53	4.00	24.96	126.78	1,394.45
30. R&R Valley metal - (W) profile	81.37 LF	0.93	9.13	17.56	83.62	919.76
31. Metal roofing	3,487.64 SF	0.00	9.04	473.80	3,200.20	35,202.27
32. R&R Hip / Ridge cap - metal roofing	78.17 LF	5.28	8.47	14.73	108.98	1,198.55
33. R&R Flashing - pipe jack - split boot	4.00 EA	12.64	104.50	12.07	48.06	528.69
34. R&R Gutter / downspout - aluminum - 6"	350.00 LF	0.80	11.99	190.19	466.68	5,133.37
Totals: Roof3				916.94	5,391.96	59,310.89
Total: Main Level				3,078.27	18,192.72	200,118.08
Line Item Totals: WILLIAMS_PLACEJH				4,942.95	22,440.76	329,646.53

**Grand Total Areas:**

0.00 SF Walls	0.00 SF Ceiling	0.00 SF Walls and Ceiling
0.00 SF Floor	0.00 SY Flooring	0.00 LF Floor Perimeter
0.00 SF Long Wall	0.00 SF Short Wall	0.00 LF Ceil. Perimeter
0.00 Floor Area	0.00 Total Area	0.00 Interior Wall Area
0.00 Exterior Wall Area	0.00 Exterior Perimeter of Walls	
11,833.24 Surface Area	118.33 Number of Squares	903.00 Total Perimeter Length
274.50 Total Ridge Length	475.12 Total Hip Length	

Coverage	Item Total	%	ACV Total	%
Dwelling	246,846.53	74.88%	246,846.53	74.88%
Other Structures	0.00	0.00%	0.00	0.00%
Contents	82,800.00	25.12%	82,800.00	25.12%
Total	329,646.53	100.00%	329,646.53	100.00%

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### Summary for Dwelling

Line Item Total	219,462.82
Material Sales Tax	4,942.95
Subtotal	224,405.77
Overhead	11,220.38
Profit	11,220.38
Replacement Cost Value	\$246,846.53
Net Claim	\$246,846.53

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### Summary for Contents

Line Item Total	82,800.00
Replacement Cost Value	<u>\$82,800.00</u>
Net Claim	<u><u>\$82,800.00</u></u>

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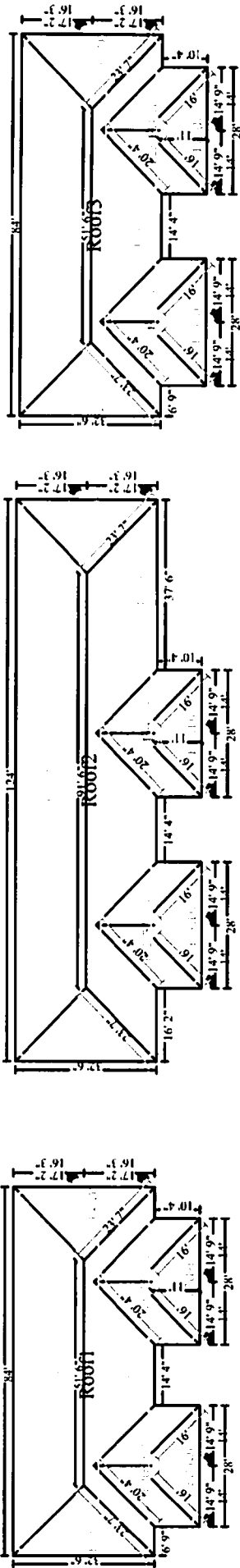
## Recap by Room

Estimate: WILLIAMS\_PLACEJH

<b>Appliances</b>		<b>79,202.84</b>	<b>26.20%</b>
Coverage: Dwelling	31.82% =	25,202.84	
Coverage: Contents	68.18% =	54,000.00	
<b>Exteriors</b>		<b>44,212.89</b>	<b>14.63%</b>
Coverage: Dwelling	34.86% =	15,412.89	
Coverage: Contents	65.14% =	28,800.00	
<b>Area: Main Level</b>			
<b>Roof1</b>		<b>53,001.99</b>	<b>17.54%</b>
Coverage: Dwelling	100.00% =	53,001.99	
<b>Roof2</b>		<b>72,843.11</b>	<b>24.10%</b>
Coverage: Dwelling	100.00% =	72,843.11	
<b>Roof3</b>		<b>53,001.99</b>	<b>17.54%</b>
Coverage: Dwelling	100.00% =	53,001.99	
<b>Area Subtotal: Main Level</b>		<b>178,847.09</b>	<b>59.17%</b>
Coverage: Dwelling	100.00% =	178,847.09	
<b>Subtotal of Areas</b>		<b>302,262.82</b>	<b>100.00%</b>
Coverage: Dwelling	72.61% =	219,462.82	
Coverage: Contents	27.39% =	82,800.00	
<b>Total</b>		<b>302,262.82</b>	<b>100.00%</b>

### Recap by Category

O&P Items			Total	%
<b>APPLIANCES</b>			<b>19,968.12</b>	<b>6.06%</b>
Coverage: Dwelling	@	100.00% =	19,968.12	
<b>GENERAL DEMOLITION</b>			<b>15,047.21</b>	<b>4.56%</b>
Coverage: Dwelling	@	100.00% =	15,047.21	
<b>ELECTRICAL - SPECIAL SYSTEMS</b>			<b>14,693.67</b>	<b>4.46%</b>
Coverage: Dwelling	@	100.00% =	14,693.67	
<b>PLUMBING</b>			<b>3,600.00</b>	<b>1.09%</b>
Coverage: Dwelling	@	100.00% =	3,600.00	
<b>ROOFING</b>			<b>152,365.32</b>	<b>46.22%</b>
Coverage: Dwelling	@	100.00% =	152,365.32	
<b>SOFFIT, FASCIA, &amp; GUTTER</b>			<b>13,788.50</b>	<b>4.18%</b>
Coverage: Dwelling	@	100.00% =	13,788.50	
<b>O&amp;P Items Subtotal</b>			<b>219,462.82</b>	<b>66.58%</b>
<b>Non-O&amp;P Items</b>			<b>Total</b>	<b>%</b>
<b>USER DEFINED ITEMS</b>			<b>82,800.00</b>	<b>25.12%</b>
Coverage: Contents	@	100.00% =	82,800.00	
<b>Non-O&amp;P Items Subtotal</b>			<b>82,800.00</b>	<b>25.12%</b>
<b>O&amp;P Items Subtotal</b>			<b>219,462.82</b>	<b>66.58%</b>
<b>Material Sales Tax</b>			<b>4,942.95</b>	<b>1.50%</b>
Coverage: Dwelling	@	100.00% =	4,942.95	
<b>Overhead</b>			<b>11,220.38</b>	<b>3.40%</b>
Coverage: Dwelling	@	100.00% =	11,220.38	
<b>Profit</b>			<b>11,220.38</b>	<b>3.40%</b>
Coverage: Dwelling	@	100.00% =	11,220.38	
<b>Total</b>			<b>329,646.53</b>	<b>100.00%</b>



**Attachment C**  
**Tax Record for Property**



## Real Property Record Search

\*\*\*\*\* CLICK ON PARCEL ID FOR PARCEL DETAIL \*\*\*\*\*

Parcel ID	Owner	Property Address	Short Legal	2022 Certified Just Value <sup>2</sup>	2022 Certified Taxable Value <sup>2</sup>	Current Use Code
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 111	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 112	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 113	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 114	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 211	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 212	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 213	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 214	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 215	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWI HOUSING VI	216 W WILLIAM ST -UNIT 311	BLK 000 0000 0001	\$616,163	\$0	0300

<sup>2</sup>As of January 1, 2022Page 1 of 2    [Next](#)   [Last](#)

You can download a data file or create reports from the results of your search.

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## Real Property Record Search

\*\*\*\*\* CLICK ON PARCEL ID FOR PARCEL DETAIL \*\*\*\*\*

Parcel ID	Owner	Property Address	Short Legal	2022 Certified Just Value <sup>2</sup>	2022 Certified Taxable Value <sup>2</sup>	Current Use Code
<a href="#">412307131002</a>	SOUTHWEST FLA GWM HOUSING VI	216 W WILLIAM ST -UNIT 312	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWM HOUSING VI	216 W WILLIAM ST -UNIT 313	BLK 000 0000 0001	\$616,163	\$0	0300
<a href="#">412307131002</a>	SOUTHWEST FLA GWM HOUSING VI	216 W WILLIAM ST -UNIT 314	BLK 000 0000 0001	\$616,163	\$0	0300

<sup>2</sup>As of January 1, 2022[First](#) [Previous](#) Page 2 of 2

You can download a data file or create reports from the results of your search.

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## Real Property Information for 412307131002 for the 2023 Tax Roll

The Charlotte County Property Appraiser makes every effort to produce and publish the most current and accurate information possible. No warranties, expressed or implied, are provided for the data herein, its use, or its interpretation.

If a discrepancy is discovered in your property's records, or those of another, please bring it to our attention immediately.

### Report Hurricane Ian Damage

#### Owner:

SOUTHWEST FLA GWI HOUSING VI  
INC  
4250 HATTON ROGERS LN  
NORTH FORT MYERS, FL 33903

Ownership current through: 7/27/2023

#### Property Location:

Property Address: 216 W WILLIAM ST -UNIT 111

or 216 W WILLIAM ST -UNIT 112  
or 216 W WILLIAM ST -UNIT 113  
or 216 W WILLIAM ST -UNIT 114  
or 216 W WILLIAM ST -UNIT 211  
or 216 W WILLIAM ST -UNIT 212  
or 216 W WILLIAM ST -UNIT 213  
or 216 W WILLIAM ST -UNIT 214  
or 216 W WILLIAM ST -UNIT 215  
or 216 W WILLIAM ST -UNIT 311  
or 216 W WILLIAM ST -UNIT 312  
or 216 W WILLIAM ST -UNIT 313  
or 216 W WILLIAM ST -UNIT 314

Property City & Zip: PUNTA GORDA 33950

Business Name: WILLIAM STREET PLACE

### General Parcel Information

Taxing District:	152
In City of Punta Gorda:	YES
Current Use:	MULTI-FAMILY 10 UNITS OR MORE
Future Land Use (Comp. Plan):	City
Zoning Code:	NR-15
Market Area / Neighborhood / Subneighborhood:	03/02/03000
Map Number:	5B07N
Section/Township/Range:	07-41-23
SOH Base Year:	0
Waterfront:	NO

### Sales Information

Date	Book/Page	Instrument Number	Selling Price	Sales code	Qualification
3/1/2001	1873/184	796568	\$60,000	VACANT	C
Click on the book/page or the instrument number to view transaction document images on the Clerk of the Circuit Court's web site.					
Click on Qualification/Disqualification Code for a description of the code. Codes are not available prior to 2003.					

### FEMA Flood Zone (Effective 12/15/2022)

Firm Panel	Floodway SFHA		Flood Zone	FIPS	COBRA	Community	Base Flood Elevation (ft.)	Letter of Map Revision (LOMR)
0241G	OUT	IN	10AE	12015C	Outside of CBRA Zone	120062	10 NAVD88	

\*If parcel has more than 1 flood zone, refer to the flood maps available on the GIS web site by clicking on View Map below. [Flood term definitions.](#)  
For more information, please contact Building Construction Services at 941-743-1201.

### Preliminary 2023 Value Summary

Approach	Land	Land Improvements	Building	Damage	Total
Cost Approach	\$612,000	\$24,682	\$796,270	\$0	\$1,432,952

Income Approach	\$817,057
Market Approach	N/A
Classified Value	N/A

## 2023 Preliminary Tax Roll Values, as of January 1, 2023

\*Preliminary values within this box are NOT certified (final) values. Consequently, they can change periodically as records are updated. Notices of Proposed Property Taxes (TRIM Notice) are typically mailed mid-August and final values certified mid-October.

Value	County	City	School	Other
Preliminary Just Value ( <u>Just Value reflects 193.011 adjustment.</u> )	\$694,498	\$694,498	\$694,498	\$694,498
Preliminary Assessed Value:	\$677,779	\$677,779	\$694,498	\$677,779
Preliminary Exemption - 33 Chantable	\$677,779	\$677,779	\$694,498	\$677,779
Preliminary Taxable Value:	\$0	\$0	\$0	\$0

## Land Information

Line	Description	Land Use	Zoning	Unit Type	Units	Depth	Table/ Factor	Acreage
1	BLK 000 0000 0001	0300	NR-15	UNIT	18	0		0

Land Value may be adjusted due to scrub jay habitat. You can access [the Board of County Commissioner's website](#) to determine if this parcel is within scrub jay habitat. For more information on scrub jay habitat within Charlotte County, see the [County's Natural Resources web site](#).

## Land Improvement Information

Code	Description	Size	Year Built	Year Condition
1012	Storm Water Drainage	8700	2001	2001
1012	Storm Water Drainage	2192	2001	2001
1080	Fence - Solid Wood 6' (lf)	36	2001	2001
1084	Fence - Vinyl - 6' (lf)	32	2008	2008
1310	Paving - Asphalt (sf)	8700	2001	2004
1320	Paving - Concrete (sf)	2192	2001	2001
1580	Fill (cy)	1210	2001	1901
1622	Irrigation - Commercial - Class I - 3k (fv)	1	2001	2001
1700	Light Poles - Low (#)	4	2001	2001
1770	Lights - Vapor, Avg (#)	4	2001	2001
1791	Lights - Wallmounts, Low (#)	14	2001	2001

[View Building Sketch](#)

## Building Information

Building Number	Description	Quality	Building Use	Year Built	Year Cond	Floors	Rooms	Bedrooms	Plumbing Fixtures	Area	A/C Area	Total Area
1	Quadraplex 4 units	2	0802	2001	2004	1	8	4	24	2106	2106	2566
2	Quadraplex 4 units	2	0802	2001	2004	1	10	6	24	3186	3186	3676
3	Quadraplex 4 units	2	0802	2001	2004	1	8	4	24	2106	2106	2566

## Building Component Information

Bld #	Code	Description	Category	Area	Percent	Year Built	Year Cond	Type
1	904	Slab Porch (SF) with Roof	Porch/Deck	230	100	2001	2004	Appendage Component
1	904	Slab Porch (SF) with Roof	Porch/Deck	230	100	2001	2004	Appendage Component
1	169	Masonry, Stucco on Block	Exterior Walls	0	100	2001	2004	Construction Component
1	212	Metal, Copper or Terne	Roofing	0	100	2001	2004	Construction Component
1	351	Warmed & Cooled Air	Heating/Cooling	0	100	2001	2004	Construction Component
1	402	Automatic Floor Cover Allowance	Floor Cover	0	100	2001	2004	Construction Component
1	601	Plumbing Fixtures (#)	Miscellaneous	1	100	2001	2004	Construction Component
1	602	Plumbing Rough-ins (#)	Miscellaneous	1	100	2001	2004	Construction Component
1	40049	High Impact Glass (%)	Segregated Costs	0	100	2001	2004	Construction Component
1	40109	Fill	Segregated Costs	3	100	2001	2004	Construction Component

1	44551	Multi-Family Water & Waste Water Service	Segregated Costs	4	100	2001	2004	Construction Component
2	904	Slab Porch (SF) with Roof	Porch/Deck	240	100	2001	2004	Appendage Component
2	904	Slab Porch (SF) with Roof	Porch/Deck	250	100	2001	2004	Appendage Component
2	169	Masonry, Stucco on Block	Exterior Walls	0	100	2001	2004	Construction Component
2	212	Metal, Copper or Terne	Roofing	0	100	2001	2004	Construction Component
2	351	Warmed & Cooled Air	Heating/Cooling	2376	100	2001	2004	Construction Component
2	402	Automatic Floor Cover Allowance	Floor Cover	0	100	2001	2004	Construction Component
2	601	Plumbing Fixtures (#)	Miscellaneous	1	100	2001	2004	Construction Component
2	602	Plumbing Rough-ins (#)	Miscellaneous	1	100	2001	2004	Construction Component
2	40049	High Impact Glass (%)	Segregated Costs	0	100	2001	2004	Construction Component
2	40109	Fill	Segregated Costs	3	100	2001	2004	Construction Component
2	44551	Multi-Family Water & Waste Water Service	Segregated Costs	4	100	2001	2004	Construction Component
3	904	Slab Porch (SF) with Roof	Porch/Deck	230	100	2001	2004	Appendage Component
3	904	Slab Porch (SF) with Roof	Porch/Deck	230	100	2001	2004	Appendage Component
3	169	Masonry, Stucco on Block	Exterior Walls	0	100	2001	2004	Construction Component
3	212	Metal, Copper or Terne	Roofing	0	100	2001	2004	Construction Component
3	351	Warmed & Cooled Air	Heating/Cooling	0	100	2001	2004	Construction Component
3	402	Automatic Floor Cover Allowance	Floor Cover	0	100	2001	2004	Construction Component
3	601	Plumbing Fixtures (#)	Miscellaneous	1	100	2001	2004	Construction Component
3	602	Plumbing Rough-ins (#)	Miscellaneous	1	100	2001	2004	Construction Component
3	40049	High Impact Glass (%)	Segregated Costs	0	100	2001	2004	Construction Component
3	40109	Fill	Segregated Costs	3	100	2001	2004	Construction Component
3	44551	Multi-Family Water & Waste Water Service	Segregated Costs	4	100	2001	2004	Construction Component

**Legal Description:****Short Legal:**

BLK 000 0000 0001

**Long Legal:**

BLACKMONS SUB LTS 1-6 452-267 525-437&amp;39 568-1642 614-1179&amp;80 1873/182 1873/184 AFF1875/1462-69

Data Last Updated: 8/9/2023- Printed On: 8/9/2023.

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