

Title: SHIP Annual Report

Fort Myers FY 2017/2018 Closeout

Report Status: Unsubmitted

Form 1

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
2	Purchase Assistance	\$50,000.00	2				
3	Owner-Occupied	\$275,398.00	9				
5	Disaster Assistance	\$27,690.00	3				
Homeownership Totals:		\$353,088.00	14				

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
13	Rent/utility assistance	\$30,000.00	14				
Rental Totals:		\$30,000.00	14				
Subtotals:		\$383,088.00	28				

Additional Use of Funds

Use	Expended
Administrative	\$32,753.40
Homeownership Counseling	
Admin From Program Income	\$4,552.49
Admin From Disaster Funds	

Totals:	\$420,393.89	28	\$.00	\$.00
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Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$327,534.00
Program Income (Interest)	\$7,920.24
Program Income (Payments)	\$75,113.40
Recaptured Funds	\$.00
Disaster Funds	\$27,192.00
Other Funds	
Carryover funds from previous year	-\$21.17
Total:	\$437,738.47

*** Carry Forward to Next Year: \$17,344.58**

NOTE: This carry forward amount will only be accurate when all revenue amounts and all expended, encumbered and unencumbered amounts have been added to Form 1

Rental Unit Information

Description	Eff.	1 Bed	2 Bed	3 Bed	4 Bed
ELI	335	373	519	681	843
VLI	557	597	717	828	923
LOW	892	956	1,147	1,325	1,478
MOD	1,338	1,434	1,722	1,987	2,217
Up to 140%	1,561	1,673	2,009	2,318	2,586

Recap of Funding Sources for Units Produced ("Leveraging")

Source of Funds Produced through June 30th for Units	Amount of Funds Expended to Date	% of Total Value
SHIP Funds Expended	\$383,088.00	77.34%
Public Moneys Expended	\$112,233.00	22.66%
Private Funds Expended	\$0.00	.00%
Owner Contribution	\$0.00	.00%
Total Value of All Units	\$495,321.00	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$353,088.00	\$354,704.83	99.54%	65%
Construction / Rehabilitation	\$303,088.00	\$354,704.83	85.45%	75%

Program Compliance - Income Set-Asides

Income Category	SHIP Funds Expended	Total Available Funds % *
Extremely Low	\$93,675.00	21.40%
Very Low	\$133,333.00	30.46%
Low	\$156,080.00	35.66%
Moderate		.00%
Over 120%-140%		.00%
Totals:	\$383,088.00	87.52%

Project Funding for Expended Funds Only

Income Category	Total Funds Mortgages, Loans & DPL's	Mortgages, Loans & DPL Unit #s	Total Funds SHIP Grants	SHIP Grant Unit #s	Total SHIP Funds Expended	Total # Units
Extremely Low	\$78,685.00	5	\$14,990.00	2	\$93,675.00	7
Very Low	\$120,633.00	13	\$12,700.00	1	\$133,333.00	14
Low	\$156,080.00	7		0	\$156,080.00	7
Moderate		0		0	\$.00	0
Over 120%-140%		0		0	\$.00	0
Totals:	\$355,398.00	25	\$27,690.00	3	\$383,088.00	28

Form 3

Number of Households/Units Produced

Strategy	List Unincorporated and Each Municipality						Total
		ELI	VLI	Low	Mod	Over 140%	
Disaster Assistance	Fort Myers	2	1				3
Owner-Occupied	Fort Myers	1	6	2			9
Purchase Assistance	Fort Myers		1	1			2
Rent / utility assistance	Fort Myers	4	6	4			14
Totals:		7	14	7			28

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality					Total
		0 - 25	26 - 40	41 - 61	62+	
Disaster Assistance	Fort Myers				3	3
Owner-Occupied	Fort Myers			3	6	9
Purchase Assistance	Fort Myers		2			2
Rent / utility assistance	Fort Myers	1	8	5		14
Totals:		1	10	8	9	28

Family Size

Description	List Unincorporated and Each Municipality				Total
		1 Person	2- 4 People	5 + People	
Disaster Assistance	Fort Myers	3			3
Owner-Occupied	Fort Myers	5	4		9
Purchase Assistance	Fort Myers		2		2
Rent / utility assistance	Fort Myers	7	7		14
Totals:		15	13		28

Race (Head of Household)

Description	List Unincorporated and Each Municipality	White	Black	Hispanic	Asian	Amer-Indian	Other	Total
Disaster Assistance	Fort Myers		3					3
Owner-Occupied	Fort Myers		9					9
Purchase Assistance	Fort Myers		2					2
Rent / utility assistance	Fort Myers	3	9	2				14
Totals:		3	23	2				28

Demographics (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Home-less	Elderly	Total
Disaster Assistance	Fort Myers			2	2
Owner-Occupied	Fort Myers			6	6
Purchase Assistance	Fort Myers				0
Rent / utility assistance	Fort Myers				0
Totals:				8	8

Special Target Groups for Funds Expended (i.e. teachers, nurses, law enforcement, fire fighters, etc.) Set Aside

Description	Special Target Group	Expended Funds	Total # of Expended Units
Rent/utility assistance	Educator/School Employee	6,750.00	3
Rent/utility assistance	Nurse/Healthcare	2,250.00	1

Form 4

Status of Incentive Strategies

Incentive	Description (If Other)	Category	Status	Year Adopted (or N/A)
Expedited permitting		Required	Implemented, in LHAP	2019
Ongoing review process		Required	Implemented, in LHAP	2019
Impact fee modifications		Required	Implemented, in LHAP	2019

Support Services

The City of Fort Myers offers rehabilitation assistance utilizing three funding sources, purchase assistance utilizing two separate funding sources, and partners with counseling agencies for homeowner education, credit repair, budget counseling, and foreclosure prevention.

The City of Fort Myers also works with agencies for disabled, elderly, and the homeless.

Other Accomplishments

The City of Fort Myers works with a non-profit organization called Lee Builders Care. Lee Builders Care assists households who are elderly and disabled with donated materials and labor.

Availability for Public Inspection and Comments

The Annual Reports are made available to the public for viewing at the City of Fort Myers Community Development Department Monday-Friday from 7:30AM-4:00PM located at 1825 Hendry Street, Suite 101, Fort Myers, FL 33901. The reports are also posted on the City's website for minimum of fourteen (14) days.

Life-to-Date Homeownership Default and Foreclosure

Total SHIP Purchase Assistance Loans: **2**

Mortgage Foreclosures

- A. Very low income households in foreclosure: **0**
- B. Low income households in foreclosure: **11**
- C. Moderate households in foreclosure: **0**

Foreclosed Loans Life-to-date: **11**

SHIP Program Foreclosure Percentage Rate Life to Date: **550.00**

Mortgage Defaults

- A. Very low income households in default: **0**
- B. Low income households in default: **1**
- C. Moderate households in default: **0**

Defaulted Loans Life-to-date: **1**

SHIP Program Default Percentage Rate Life to Date: **50.00**

Strategies and Production Costs

Strategy	Average Cost
Disaster Assistance	\$9,230.00
Owner-Occupied	\$30,599.78
Purchase Assistance	\$25,000.00
Rent/utility assistance	\$2,142.86

Expended Funds

Total Unit Count: **28**

Total Expended Amount: **\$383,088.00**

Strategy	Full Name	Address	City	Zip Code	Expended Funds	FY if Unit Already Counted
Disaster Assistance	Sharon Snead	4334 Arlington	Fort Myers	33905	\$7,490.00	
Disaster Assistance	Stella Davis	2222 Carver Street	Fort Myers	33916	\$7,500.00	
Owner-Occupied	Annie Aaron	1770 Aquarius Ct.	Fort Myers	33916	\$69,685.00	
Disaster Assistance	Cynthia Reid	3073 Royal Palm	Fort Myers	33901	\$12,700.00	
Owner-Occupied	Angelina Washington	1765 N. Palmdale	Fort Myers	33916	\$19,790.00	
Owner-Occupied	Karen Jones	1508 Veronica S. Shoemaker	Fort Myers	33916	\$1,145.00	
Purchase Assistance	Sharniece Russaw	2275 French Street	Fort Myers	33916	\$30,000.00	
Owner-Occupied	Stenella Bassett	2150 Simon Court	Fort Myers	33916	\$52,655.00	
Owner-Occupied	Agnes Thomas	2737 Lemon Street	Fort Myers	33916	\$47,148.00	
Purchase Assistance	Toccarra Motley	2029 Dupree Street	Fort Myers	33916	\$20,000.00	
Owner-Occupied	Barbara Griffin	1526 Veronica S. Shoemaker	Fort Myers	33916	\$15,700.00	
Owner-Occupied	Janie Addison	1810 Fountain Street	Fort Myers	33916	\$65,475.00	
Owner-Occupied	Louisa Harvin	1806 S. Markley Ct.	Fort Myers	33916	\$3,250.00	
Owner-Occupied	Janice Boney	2622 Orange Street	Fort Myers	33916	\$550.00	
Rent/utility assistance	Michael De Armas	2233 Altamont Ave.	Fort Myers	33916	\$1,500.00	
Rent/utility assistance	Nanita Leonard	4026 Winkler Ave., Apt. 102	Fort Myers	33916	\$2,250.00	
Rent/utility assistance	Arianna Lane	4121 Residence Drive, Apt. 306	Fort Myers	33916	\$2,250.00	
Rent/utility assistance	Kerra Oliver	4238 Avian Ave.	Fort Myers	33916	\$2,250.00	
Rent/utility assistance	Christine Yfantides	3117 Saint Charles St.	Fort Myers	33916	\$2,250.00	
Rent/utility assistance	Vernon Bush	2346 Winkler Ave., H 202	Fort Myers	33916	\$2,250.00	
Rent/utility assistance	Haley Byrd	5230 Cedarbend Drive, Apt. 3	Fort Myers	33919	\$2,250.00	
Rent/utility assistance	Angelina Calixto	4154 Castilla Circle, Apt. 205	Fort Myers	33916	\$2,250.00	
Rent/utility assistance	Eduardo Bermudez	2335 Central Ave., Unit 314	Fort Myers	33901	\$2,250.00	
Rent/utility assistance	Debra Harris	2019 Lafayette St., Apt. 3	Fort Myers	33916	\$2,250.00	
Rent/utility assistance	Shanika Hayes	2951 Central Ave., Apt. 201	Fort Myers	33901	\$2,250.00	
Rent/utility assistance	Steven Fetterhoff	1708 Sunset Place	Fort Myers	33901	\$2,250.00	

Rent/utility assistance	Aubrina Foster	2057 Linhart Ave., #2	Fort Myers	33901	\$1,950.00	
Rent/utility assistance	Elizabeth Ponder-Murphy	2072 Palm Avenue	Fort Myers	33916	\$1,800.00	

Administration by Entity

Name	Business Type	Strategy Covered	Responsibility	Amount
City of Fort Myers	Local Government	Strategies A, B, C, & D	Full implementation	\$37,305.89

Program Income

Program Income Funds	
Loan Repayment:	\$75,113.40
Refinance:	\$0.00
Foreclosure:	\$0.00
Sale of Property:	\$0.00
Interest Earned:	\$7,920.24
Total:	\$83,033.64

Number of Affordable Housing Applications

Number of Affordable Housing Applications	
Submitted	0
Approved	0
Denied	0

Explanation of Recaptured funds

Description	Amount
	\$0.00
	\$0.00
	\$0.00
Total:	\$0.00

Rental Developments

Development Name	Owner	Address	City	Zip Code	SHIP Amount	SHIP Units	Compliance Monitored By
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Single Family Area Purchase Price

The average area purchase price of single family units:

Or

Not Applicable

Form 5

Special Needs Breakdown

SHIP Expended and Encumbered for Special Needs Applicants

Code(s)	Strategies	Expended Amount	Units	Encumbered Amount	Units
3	Owner-Occupied	\$275,398.00	9		
5	Disaster Assistance	\$7,500.00	1		

Special Needs Category Breakdown by Strategy

Strategies	Special Needs Category	Expended Amount	Units	Encumbered Amount	Units
(5) Disaster Assistance	Receiving Social Security Disability Insurance	\$7,500.00	1		
(3) Owner-Occupied	Person with Disabling Condition (not DD)	\$117,978.00	3		
(3) Owner-Occupied	Receiving Social Security Disability Insurance	\$154,170.00	5		
(3) Owner-Occupied	Receiving Supplemental Security Income	\$3,250.00	1		

Provide a description of efforts to reduce homelessness:

The City of Fort Myers partnered with Lee County to create the CoC Strategic Plan to end homelessness. The City will continue to partner with the County to address issues of homelessness in the City and will assist in implementing the Plan. As a member of the Lee County Coalition for the Homeless, the City supports the regional goals outlined in the Continuum of Care.

Interim Year Data

Interim Year Data

Interim Year 1		
State Annual Distribution	\$113,257.00	
Program Income	\$0.00	
Program Funds Expended		
Program Funds Encumbered	\$113,257.00	
Total Administration Funds Expended	\$0.00	
Total Administration Funds Encumbered	\$0.00	
Homeownership Counseling	\$0.00	
Disaster Funds		
65% Homeownership Requirement	\$113,257.00	100.00%
75% Construction / Rehabilitation	\$113,257.00	100.00%
30% Very & Extremely Low Income Requirement	\$97,849.00	86.40%
30% Low Income Requirement	\$15,408.00	13.60%
20% Special Needs Requirement	\$71,592.00	63.21%
Carry Forward to Next Year		

Interim Year 2	
State Annual Distribution	\$146,731.00
Program Funds Expended	
Program Funds Encumbered	

LG Submitted Comments: