

Title: SHIP Annual Report

Report Status: Unsubmitted

Fort Myers FY 2019/2020 Closeout

Form 1

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
3	Owner-Occupied	\$206,068.95	5				
6	Emergency Rehabilitation	\$28,350.00	2				

Homeownership Totals: **\$234,418.95** **7**

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
Rental Totals:							

Rental Totals:

Subtotals: **\$234,418.95** **7**

Additional Use of Funds

Use	Expended
Administrative	\$14,673.10
Homeownership Counseling	\$0.00
Admin From Program Income	\$500.00
Admin From Disaster Funds	\$0.00

Totals: **\$249,592.05** **7** **\$0.00** **\$0.00**

Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$146,731.00
Program Income (Interest)	\$10,000.00
Program Income (Payments)	\$87,604.00
Recaptured Funds	\$0.00
Disaster Funds	
Other Funds	
Carryover funds from previous year	\$4,039.97
Total:	\$248,374.97

*** Carry Forward to Next Year: -\$1,217.08**

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

Form 2

Rental Unit Information

Description	Eff.	1 Bed	2 Bed	3 Bed	4 Bed
ELI	362	396	543	711	879
VLI	603	646	776	896	1,000
LOW	965	1,033	1,240	1,433	1,598
MOD	1,449	1,552	1,863	2,151	2,400
Up to 140%	1,690	1,811	2,173	2,509	2,800

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	\$234,418.95	62.90%
Public Moneys Expended	\$138,250.00	37.10%
Private Funds Expended	\$0.00	.00%
Owner Contribution	\$0.00	.00%
Total Value of All Units	\$372,668.95	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$234,418.95	\$150,770.97	155.48%	65%
Construction / Rehabilitation	\$234,418.95	\$150,770.97	155.48%	75%

Program Compliance - Income Set-Asides

Income Category	SHIP Funds	Total Available Funds % *
Extremely Low	\$74,425.00	29.96%
Very Low	\$49,023.50	19.74%
Low	\$110,970.45	44.68%
Moderate	\$0.00	.00%
Over 120%-140%	\$0.00	.00%
Totals:	\$234,418.95	94.38%

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	\$63,375.00	2	\$11,050.00	1	\$74,425.00	3
Very Low	\$31,723.50	1	\$17,300.00	1	\$49,023.50	2
Low	\$110,970.45	2		0	\$110,970.45	2
Moderate		0		0	\$0.00	0
Over 120%-140%		0		0	\$0.00	0
Totals:	\$206,068.95	5	\$28,350.00	2	\$234,418.95	7

Form 3

Number of Households/Units Produced

Strategy	List Unincorporated and Each Municipality						Total
		ELI	VLI	Low	Mod	Over 140%	
Owner-Occupied	Fort Myers	2	1	2			5
Emergency Rehabilitation	Fort Myers	1	1				2
Totals:		3	2	2			7

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality					Total
		0 - 25	26 - 40	41 - 61	62+	
Owner-Occupied	Fort Myers			1	4	5
Emergency Rehabilitation	Fort Myers				2	2
Totals:				1	6	7

Family Size

Description	List Unincorporated and Each Municipality				Total
		1 Person	2- 4 People	5 + People	
Owner-Occupied	Fort Myers	2	3		5
Emergency Rehabilitation	Fort Myers	1	1		2
Totals:		3	4		7

Race (Head of Household)

Description	List Unincorporated and Each Municipality							Total
		White	Black	Hispanic	Asian	Amer-Indian	Other	
Owner-Occupied	Fort Myers		5					5
Emergency Rehabilitation	Fort Myers		2					2
Totals:			7					7

Demographics (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Home-less	Elderly	Total
Owner-Occupied	Fort Myers			4	4
Emergency Rehabilitation	Fort Myers			2	2
Totals:				6	6

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
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Form 4

Status of Incentive Strategies

Incentive	Description (If Other)	Category	Status	Year Adopted (or N/A)
Expedited permitting		Required	Implemented, in LHAP	2008
Ongoing review process		Required	Implemented, in LHAP	2008

Support Services

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

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

Other Accomplishments

The City of Fort Myers also works with the non-profit organization "Lee Builder's Care" which assists households with donated materials and labor to assist low-income households who are elderly or disabled.

Availability for Public Inspection and Comments

Annual Reports are made available for public viewing at the City of Fort Myers Community Development Department, 1825 Hendry Street, Suite 101, Fort Myers, FL 33901. The reports are also posted on the City's website for a minimum of fifteen (15) 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: **1**
- C. Moderate households in foreclosure: **0**

Foreclosed Loans Life-to-date: **1**
 SHIP Program Foreclosure Percentage Rate Life to Date: **50.00**

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
Emergency Rehabilitation	\$14,175.00
Owner-Occupied	\$41,213.79

Expended Funds

Total Unit Count: **7** Total Expended Amount: **\$234,418.95**

Strategy	Full Name	Address	City	Zip Code	Expended Funds	FY if Unit Already Counted
Owner-Occupied	Ronnie Clark	1916 Velasco Street	Fort Myers	33916	\$19,900.00	
Owner-Occupied	Susie Harris	371 Bell Street	Fort Myers	33916	\$51,858.50	
Owner-Occupied	Vivian Newson	2860 Economy Street	Fort Myers	33916	\$43,475.00	
Owner-Occupied	Karen Jones	1508 Veronica Shoemaker Blvd	Fort Myers	33916	\$59,111.95	
Owner-Occupied	Jeanette Cason	3019 Edison Avenue	Fort Myers	33916	\$31,723.50	
Emergency Rehabilitation	Haywood Baskin	2646 Lime Street	Fort Myers	33916	\$17,300.00	
Emergency Rehabilitation	Cecilia Watson	2950 Saint Charles Street	Fort Myers	33916	\$11,050.00	

Administration by Entity

Name	Business Type	Strategy Covered	Responsibility	Amount
City of Fort Myers	Local government	B, C, D, & F	Full implementation	\$15,173.10

Program Income

Program Income Funds	
Loan Repayment:	
Refinance:	

Foreclosure:	
Sale of Property:	\$87,604.00
Interest Earned:	\$10,000.00
Total:	\$97,604.00

Number of Affordable Housing Applications

Number of Affordable Housing Applications	
Submitted	
Approved	
Denied	

Explanation of Recaptured funds

Description	Amount
	\$.00
	\$.00
	\$.00
Total:	\$.00

Rental Developments

Development Name	Owner	Address	City	Zip Code	SHIP Amount	SHIP Units	Compliance Monitored By

Single Family Area Purchase Price

The average area purchase price of single family units:

Or

Not Applicable

Special Needs Breakdown

SHIP Expended and Encumbered for Special Needs Applicants

Code(s)	Strategies	Expended Amount	Units	Encumbered Amount	Units
3	Owner-Occupied	\$206,068.95	5		
6	Emergency Rehabilitation	\$28,350.00	2		

Special Needs Category Breakdown by Strategy

Strategies	Special Needs Category	Expended Amount	Units	Encumbered Amount	Units
(3) Owner-Occupied	Receiving Social Security Disability Insurance	\$115,233.50	3		
(3) Owner-Occupied	Receiving Supplemental Security Income	\$90,835.45	2		
(6) Emergency Rehabilitation	Receiving Supplemental Security Income	\$28,350.00	2		

Provide a description of efforts to reduce homelessness:

The City of Fort Myers works with Lee County Continuum of Care to assist with providing resources for individual or families who may experience homelessness.

Interim Year Data

Interim Year Data

Interim Year 1		
State Annual Distribution		
Program Income	\$10,000.00	
Program Funds Expended	\$105,574.78	
Program Funds Encumbered	\$254,725.00	
Total Administration Funds Expended		
Total Administration Funds Encumbered		
Homeownership Counseling	\$0.00	
Disaster Funds		
65% Homeownership Requirement	\$360,299.78	N/A
75% Construction / Rehabilitation	\$346,349.78	N/A
30% Very & Extremely Low Income Requirement	\$360,299.78	3603.00%
30% Low Income Requirement		0.00%
20% Special Needs Requirement	\$346,349.78	N/A
Carry Forward to Next Year		

LG Submitted Comments: