

Title: SHIP Annual Report

Sarasota County/Sarasota FY 2012/2013

Report Status: Unsubmitted

Form 1

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
3	Owner Occupied Rehabilitation	\$433,560.37	27				

Homeownership Totals: \$433,560.37 27

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units

Rental Totals:

Subtotals: \$433,560.37 27

Additional Use of Funds

Use	Expended	Encumbered	Unencumbered
Administrative	\$15,039.00		
Homeownership Counseling	\$15,600.00		
Admin From Program Income	\$34,842.00		
Admin From Disaster Funds			

Totals:	\$499,041.37	27	\$.00	\$.00
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Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$150,390.00
Program Income (Interest)	\$33,382.88
Program Income (Payments)	\$315,045.35
Recaptured Funds	
Disaster Funds	
Other Funds	
Carryover funds from previous year	\$415.26
Total:	\$499,233.49

*** Carry Forward to Next Year: \$192.12**

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
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√ No rental strategies are in use

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	\$433,560.37	93.18%
Public Moneys Expended	\$29,679.50	6.38%
Private Funds Expended	\$.00	.00%
Owner Contribution	\$2,039.50	.44%
Total Value of All Units	\$465,279.37	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$433,560.37	\$150,390.00	288.29%	65%
Construction / Rehabilitation	\$433,560.37	\$150,390.00	288.29%	75%

Program Compliance - Income Set-Asides

Income Category	SHIP Funds Expended	SHIP Funds Encumbered	SHIP Funds Unencumbered	Total of SHIP Funds	Total Available Funds % *
Extremely Low	\$83,096.00			\$83,096.00	16.64%
Very Low	\$90,207.52			\$90,207.52	18.07%
Low	\$260,256.85			\$260,256.85	52.13%
Moderate				\$.00	.00%
Totals:	\$433,560.37	\$.00	\$.00	\$433,560.37	86.85%

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	\$83,096.00	4			\$83,096.00	4
Very Low	\$88,779.52	6	\$1,428.00	1	\$90,207.52	7
Low	\$258,416.85	15	\$1,840.00	1	\$260,256.85	16
Moderate					\$.00	0
Totals:	\$430,292.37	25	\$3,268.00	2	\$433,560.37	27

Form 3

Number of Households/Units Produced

Strategy	List Unincorporated and Each Municipality	ELI	VLI	Low	Mod	Total
Owner Occupied Rehabilitation	City of North Port			1		1
Owner Occupied Rehabilitation	City of Sarasota		1	1		2
Owner Occupied Rehabilitation	City of Venice			1		1
Owner Occupied Rehabilitation	Sarasota County	4	6	13		23
Totals:		4	7	16		27

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality	0 - 25	26 - 40	41 - 61	62+	Total
Owner Occupied Rehabilitation	City of North Port			1		1
Owner Occupied Rehabilitation	City of Sarasota			1	1	2
Owner Occupied Rehabilitation	City of Venice				1	1
Owner Occupied Rehabilitation	Sarasota County		2	12	9	23
Totals:			2	14	11	27

Family Size

Description	List Unincorporated and Each Municipality	1 Person	2- 4 People	5 + People	Total
Owner Occupied Rehabilitation	City of North Port	1			1
Owner Occupied Rehabilitation	City of Sarasota	1	1		2
Owner Occupied Rehabilitation	City of Venice	1			1
Owner Occupied Rehabilitation	Sarasota County	12	10	1	23
Totals:		15	11	1	27

Race (Head of Household)

Description	List Unincorporated and Each Municipality	White	Black	Hispanic	Asian	Amer-Indian	Other	Total
Owner Occupied Rehabilitation	City of North Port	1						1
Owner Occupied Rehabilitation	City of Sarasota	2						2

Owner Occupied Rehabilitation	City of Venice	1						1
Owner Occupied Rehabilitation	Sarasota County	23						23
Totals:		27						27

Special Needs (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Devel. Disabled	Home-less	Elderly	Special Needs	Special Needs	Total
Owner Occupied Rehabilitation	City of North Port					1		1
Owner Occupied Rehabilitation	City of Sarasota				1			1
Owner Occupied Rehabilitation	City of Venice				1			1
Owner Occupied Rehabilitation	Sarasota County				9	1		10
Totals:					11	2		13

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 Strategy:

1. Add member of Housing Division to the Development Review Committee
2. All projects meeting the affordable housing criteria be considered in Sarasota County before other development reviews and policy included in the updated Land Development regulations
3. If the seven (7) week review for City projects is exceeded, the City will review all affordable housing developments ahead of any other project
4. Expand the City's Impact Fee program into the County
5. Evaluate current density bonus during the update of the Sarasota Comprehensive Plan
6. Evaluate the City's zoning regulations during the process of the zoning code review
7. Use transfer of development rights as a mechanism to encourage the production of affordable housing in Sarasota County
8. Amend Sarasota County Directive 1.31 to require that all new ordinances or amendments to existing ordinances be reviewed for their impact on affordable housing
9. Appoint the Housing Programs Manager to serve on the Development Review Committee
10. The City should prepare a checklist to be attached to each City ordinance and amendment requiring an analysis on the impact of affordability of housing
11. Review all records and maps of the Property Appraisers Office to determine their suitability as affordable housing sites

Adopting Ordinance or Resolution Number or identify local policy:



- Local policy adopted after committee recommendation
2. Land Development Regulations (ordinance 81-12 amended by ordinance 97-051)
3. None needed
4. Resolution 95-169
5. Ordinance 96-027
6. Ordinance 98-4076
7. Sarasota Zoning Regulations (ordinance 75-38)
8. Sarasota County Directive 1.31
9. Refer to answer #1
10. Administrative Regulation No. 039.A005.1298
11. Staff completed review in 1994. City has undertaken a review and has acquired seven properties that are suitable for affordable housing

Implementation Schedule (Date):

1. Complete
2. July 17, 1997
3. Ongoing
4. Adopted August 1, 1995
5. April, 1996
6. Approved October 21, 1998
7. 1982
8. Complete
9. Complete
10. Approved December 30, 1998
11. Complete

Has the plan or strategy been implemented? If no, describe the steps that will be taken to implement the plan:

- Strategy has been implemented
2. Strategy has been implemented
3. Strategy has been implemented
4. Strategy has been implemented
5. Strategy has been implemented
6. Strategy has been implemented
7. Strategy has been implemented
8. Strategy has been implemented
9. Strategy has been implemented
10. Strategy has been implemented
11. Strategy has been implemented

Status of Strategy - (is the strategy functioning as intended, i.e. are the time frames being met, etc.):

1. Yes, time frame has been met
2. Yes, time frame has been met
3. Yes, time frame has been met
4. Yes, time frame has been met
5. Yes, time frame has been met
6. Yes, time frame has been met
7. Yes, time frame has been met
8. Yes, time frame has been met
9. Yes, time frame has been met
10. Yes, time frame has been met
11. Yes, time frame has been met

Support Services

Support Services available to residents of affordable housing units:
 1. Credit Counseling – Consumer Credit Counseling Services
 2. Legal Aid of Manasota
 3. Weatherization Assistance – Sarasota County Social Services

Other Accomplishments

Newspaper Clippings Sent Separately as a PDF Directly to Terry Auringer

Availability for Public Inspection and Comments

A Public Announcement advertising the SHIP Annual Report was posted at City Hall by the City Auditor and Clerk for a time period of 30 days beginning August 11, 2015. If, after September 15, 2015, any comments are received, they will be forwarded to the Florida Housing Finance Corp.

Homeownership Default & Foreclosure

Mortgage Foreclosures

- A. Very low income households in foreclosure: **1**
- B. Low income households in foreclosure: **11**
- C. Moderate households in foreclosure: **0**
- Foreclosed Loans Life-to-date: **161**
- SHIP Program Foreclosure Percentage Rate Life to Date: **19**

Mortgage Defaults

- A. Very low income households in default: **1**
- B. Low income households in default: **3**
- C. Moderate households in default: **0**
- Defaulted Loans Life-to-date: **22**
- SHIP Program Default Percentage Rate Life to Date: **3**

Welfare to Work Programs

During the past fiscal year, five (5) points were awarded to each applicant that participated in welfare-to-work programs.

Strategies and Production Costs

Strategy	Average Cost
Owner Occupied Rehabilitation	\$16,057.79

Expended Funds

Total Unit Count: **27** Total Expended Amount: **\$433,560.00**

Strategy	Full Name	Address	City	Zip Code	Expended Funds	Unit Counted
Owner Occupied Rehabilitation	Wattier, Sherry	3744 Las Vegas Ave	North Port	34288	\$48,714.55	<input type="checkbox"/>
Owner Occupied Rehabilitation	Danielle, Ruth	3264 Ramblewood Cir	Sarasota	34237	\$30,654.25	<input type="checkbox"/>

Owner Occupied Rehabilitation	Documet, Gunther	1313 N Conrad Ave	Sarasota	34237	\$7,397.55	<input type="checkbox"/>
Owner Occupied Rehabilitation	Humbertson, Donald	1257 Lucaya Ave	Venice	34285	\$16,830.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Besterfield, Ann Elizabeth	3051 Gulf Gate Dr	Sarasota	34231	\$23,607.99	<input type="checkbox"/>
Owner Occupied Rehabilitation	Briggs, Donald	321 Circlewood Dr, Unit D	Venice	34293	\$18,260.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Carroll, Judy	4119 Copenhagen St	Sarasota	34239	\$1,840.00	<input type="checkbox"/>
Owner Occupied Rehabilitation	Chevalier, Carol	1159 Cumberland Rd	Venice	34293	\$8,587.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Day, Lillian	4211 Jean Wy	Sarasota	34232	\$6,662.55	<input type="checkbox"/>
Owner Occupied Rehabilitation	French, Nancy	5733 Whistlewood Cir	Sarasota	34232	\$9,491.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Furrow, Linda Susan	2612 Sunnybrook Dr	Sarasota	34239	\$19,922.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Graham, Rebecca	3369 Crystal Lakes Ct	Sarasota	34235	\$31,640.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Hannon, Barbara	5426 Potter St	Sarasota	34232	\$31,984.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Hernandez, Juan Carlos	4948 Lahaina Dr	Sarasota	34232	\$8,505.55	<input type="checkbox"/>
Owner Occupied Rehabilitation	Hewitt, Donna	249 Algiers Dr	Venice	34293	\$13,883.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Jacobsen, Erick Lee	4817 Cadillac Way	Sarasota	34231	\$16,615.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Lozano, Alis	2034 N. Allendale Ave	Sarasota	34234	\$18,967.00	<input type="checkbox"/>
Owner Occupied Rehabilitation	Maloy, Nancy	4229 N Lockwood Ridge Rd	Sarasota	34234	\$9,979.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Murphy, Joseph	940 E. Seminole Dr.	Venice	34293	\$20,709.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Murphy, Susan	205 Palm Ave	Nokomis	34275	\$19,383.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Rapp, Patrick	907 Shasta Rd	Venice	34293	\$10,889.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Robbins, Gayle	3248 Cambridge Dr	Sarasota	34232	\$14,573.43	<input type="checkbox"/>
Owner Occupied Rehabilitation	Strickland, Linda	802 Oak Vista Dr	Sarasota	34232	\$13,466.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Trotta, Andrea	359 Redwood Rd	Venice	34293	\$4,373.00	<input type="checkbox"/>
Owner Occupied Rehabilitation	Whitlow, Edward	5866 E Deer Hollow Lane	Sarasota	34232	\$7,379.50	<input type="checkbox"/>
Owner Occupied Rehabilitation	Wielgus, Trustee, Joan	4426 Cayo Grande Dr	Sarasota	34233	\$1,428.00	<input type="checkbox"/>
Owner Occupied Rehabilitation	Zmick, David	4083 Asbury Pl	Sarasota	34233	\$17,812.00	<input type="checkbox"/>

Administrative Expenditures

Administrative Expenses – Office of Housing & Community Development = \$49,881.00

Sub Recipients and Consultants

Name	Business Type	Strategy Covered	Responsibility	Amount
Goodwill Industries- Manasota	Home Credit Counseling	Home Ownership Counseling	Conduct counseling sessions for first- time homebuyers	\$15,600.00

Program Income

Program Income Funds	
Loan Repayment:	\$315,045.35
Refinance:	
Foreclosure:	
Sale of Property:	
Interest Earned:	\$33,382.88
Other ():	
Total:	\$348,428.23

Explanation of Recaptured funds

Description	Amount
Total:	\$0.00

Rental Developments

Development Name	Owner	Address	City	Zip Code
Sarasota County/Sarasota 2012 Closeout				

Single Family Area Purchase Price

The average area purchase price of single family units:

Or

√ Not Applicable

SHIP Amount	SHIP Units	Compliance Monitored By	Additional Notes
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LG Submitted Comments:

Title: SHIP Annual Report
Sarasota County/Sarasota FY 2013/2014

Report Status: Unsubmitted

Form 1

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
3	Owner Occupied Rehabilitation	\$153,431.73	5	\$546,889.18	33		
11	Special Needs	\$109,671.42	9	\$163,865.55	12		
Homeownership Totals:		\$263,103.15	14	\$710,754.73	45		

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
Rental Totals:							
Subtotals:		\$263,103.15	14	\$710,754.73	45		

Additional Use of Funds

Use	Expended	Encumbered	Unencumbered
Administrative	\$19,136.00		
Homeownership Counseling	\$11,940.00		
Admin From Program Income	\$19,308.00		
Admin From Disaster Funds			

Totals:	\$313,487.15	14	\$710,754.73	45	\$0.00
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Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$637,875.00
Program Income (Interest)	\$36,694.91
Program Income (Payments)	\$349,479.85
Recaptured Funds	
Disaster Funds	
Other Funds	
Carryover funds from previous year	\$192.12
Total:	\$1,024,241.88

* Carry Forward to Next Year: \$0.00

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
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√ No rental strategies are in use

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	\$263,103.15	100.00%
Public Moneys Expended	\$0.00	.00%
Private Funds Expended	\$0.00	.00%
Owner Contribution	\$0.00	.00%
Total Value of All Units	\$263,103.15	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$973,857.88	\$637,875.00	152.67%	65%
Construction / Rehabilitation	\$973,857.88	\$637,875.00	152.67%	75%

Program Compliance - Income Set-Asides

Income Category	SHIP Funds Expended	SHIP Funds Encumbered	SHIP Funds Unencumbered	Total of SHIP Funds	Total Available Funds % *
Extremely Low	\$28,124.90	\$6,000.00		\$34,124.90	3.33%
Very Low	\$75,216.28	\$436,829.06		\$512,045.34	49.99%
Low	\$159,761.97	\$267,925.67		\$427,687.64	41.76%
Moderate				\$0.00	.00%
Totals:	\$263,103.15	\$710,754.73	\$0.00	\$973,857.88	95.08%

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	\$28,124.90	2			\$28,124.90	2
Very Low	\$72,613.87	3	\$2,602.41	1	\$75,216.28	4
Low	\$159,761.97	8			\$159,761.97	8
Moderate					\$0.00	0
Totals:	\$260,500.74	13	\$2,602.41	1	\$263,103.15	14

Number of Households/Units Produced

Strategy	List Unincorporated and Each Municipality	ELI	VLI	Low	Mod	Total
Owner Occupied Rehabilitation	City of North Port			1		1
Owner Occupied Rehabilitation	Sarasota County	1	1	2		4
Special Needs	City of North Port		1	1		2
Special Needs	Sarasota County	1	2	4		7
Totals:		2	4	8		14

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality	0 - 25	26 - 40	41 - 61	62+	Total
Owner Occupied Rehabilitation	City of North Port		1			1
Owner Occupied Rehabilitation	Sarasota County		1	2	1	4
Special Needs	City of North Port				2	2
Special Needs	Sarasota County			2	5	7
Totals:			2	4	8	14

Family Size

Description	List Unincorporated and Each Municipality	1 Person	2- 4 People	5 + People	Total
Owner Occupied Rehabilitation	City of North Port			1	1
Owner Occupied Rehabilitation	Sarasota County	3	1		4
Special Needs	City of North Port	1	1		2
Special Needs	Sarasota County	5	2		7
Totals:		9	4	1	14

Race (Head of Household)

Description	List Unincorporated and Each Municipality	White	Black	Hispanic	Asian	Amer-Indian	Other	Total
Owner Occupied Rehabilitation	City of North Port	1						1
Owner Occupied Rehabilitation	Sarasota County	4						4
Special Needs	City of North Port	2						2
Special Needs	Sarasota County	6	1					7
Totals:		13	1					14

Special Needs (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Devel. Disabled	Home-less	Elderly	Special Needs	Special Needs	Total
Owner Occupied Rehabilitation	City of North Port							0
Owner Occupied Rehabilitation	Sarasota County							0
Special Needs	City of North Port				1	1		2
Special Needs	Sarasota County				5	2		7
Totals:					6	3		9

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

Expended Funds

\$263,103.00

Strategy	Full Name	Address	City	Zip Code	Expended Funds	Unit Counted
Owner Occupied Rehabilitation	Graham, Eric	4368 Belladonna Av	North Port	34286	\$47,000.53	<input type="checkbox"/>
Owner Occupied Rehabilitation	Rodriguez, Gretter	4621 Parnell Dr	Sarasota	34232	\$18,068.68	<input type="checkbox"/>
Owner Occupied Rehabilitation	Tomasik, Judith	3770 Secor Rd	Venice	34293	\$52,563.11	<input type="checkbox"/>
Owner Occupied Rehabilitation	Trawick, Ann	8730 Filson Pl	Sarasota	34231	\$16,380.96	<input type="checkbox"/>
Owner Occupied Rehabilitation	Ulman, Christopher	2888 Webber Pl	Sarasota	34232	\$19,418.45	<input type="checkbox"/>
Special Needs	Hoffman, Frederick	3913 Pinstar Ter	North Port	34287	\$18,629.89	<input type="checkbox"/>
Special Needs	Lafferty, Winifred	3688 Woodbridge Avenue	North Port	34287	\$2,602.41	<input type="checkbox"/>
Special Needs	Boudrot, Mark	2385 Lemon Ave	Englewood	34223	\$11,470.65	<input type="checkbox"/>
Special Needs	Campbell, Lorette	17 Bridge St	Englewood	34223	\$8,706.45	<input type="checkbox"/>
Special Needs	Errico, Helen	434 Belmont Ave	Venice	34293	\$15,626.89	<input type="checkbox"/>
Special Needs	Loyd, Sam	2743 17th St	Sarasota	34234	\$20,872.15	<input type="checkbox"/>
Special Needs	Nuzum, John	1729 Hudson St	Englewood	34223	\$11,712.22	<input type="checkbox"/>
Special Needs	Kehrle, Jane	504 S. Jessica St	Nokomis	34275	\$9,514.22	<input type="checkbox"/>
Special Needs	Sloan, Alexandra	925 S. Lockwood Ridge Rd	Sarasota	34237	\$10,536.54	<input type="checkbox"/>

Sarasota County/Sarasota 2013 Interim-1

Special Needs Breakdown

SHIP Expended and Encumbered for Special Needs Applicants

Code(s)	Strategies	Expended Amount	Units	Encumbered Amount	Units
11	Special Needs	\$109,671.42	9	\$163,865.55	12

Special Needs Category Breakdown by Strategy

Strategies	Special Needs Category	Expended Amount	Units	Encumbered Amount	Units
(11) Special Needs	Receiving Supplemental Security Income	\$89,620.66	7	\$90,000.00	10
(11) Special Needs	Person with Disabling Condition (not DD)	\$20,050.76	2	\$73,865.55	2

LG Submitted Comments:

Title: SHIP Annual Report

Sarasota County/Sarasota FY 2014/2015

Report Status: Unsubmitted

Form 1

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
2	Purchase Assistance without Rehab	\$512,041.49	18				
3	Owner Occupied Rehabilitation					\$813,882.42	40
10	New Construction			\$455,234.00	2		
11	Special Needs					\$20,000.00	2
Homeownership Totals:		\$512,041.49	18	\$455,234.00	2	\$833,882.42	42

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
12	Special Needs-Rental			\$380,000.00	60		
15	Demolition/Reconstruction-Rental			\$80,000.00	72		
Rental Totals:				\$460,000.00	132		
Subtotals:		\$512,041.49	18	\$915,234.00	134	\$833,882.42	42

Additional Use of Funds

Use	Expended	Encumbered	Unencumbered
Administrative	\$86,035.00		\$103,201.00
Homeownership Counseling			
Admin From Program Income			\$15,000.00
Admin From Disaster Funds			

Totals:	\$598,076.49	18	\$915,234.00	134	\$952,083.42	42
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Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$1,892,362.00
Program Income (Interest)	\$30,820.09
Program Income (Payments)	\$542,211.82
Recaptured Funds	
Disaster Funds	
Other Funds	
Carryover funds from previous year	\$.00
Total:	\$2,465,393.91

*** Carry Forward to Next Year: \$.00**

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
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√ The amount of rent charged for a rental unit based on the unit size complies with the Rent Limits posted on the Florida Housing website

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	\$512,041.49	25.25%
Public Moneys Expended	\$0.00	.00%
Private Funds Expended	\$1,445,486.00	71.29%
Owner Contribution	\$69,969.51	3.45%
Total Value of All Units	\$2,027,497.00	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$1,801,157.91	\$1,892,362.00	95.18%	65%
Construction / Rehabilitation	\$1,749,116.42	\$1,892,362.00	92.43%	75%

Program Compliance - Income Set-Asides

Income Category	SHIP Funds Expended	SHIP Funds Encumbered	SHIP Funds Unencumbered	Total of SHIP Funds	Total Available Funds % *
Extremely Low		\$159,812.00	\$99,241.00	\$259,053.00	10.51%
Very Low	\$52,229.21	\$468,000.00	\$250,164.72	\$770,393.93	31.25%
Low	\$459,812.28	\$287,422.00	\$484,476.70	\$1,231,710.98	49.96%
Moderate				\$0.00	.00%
Totals:	\$512,041.49	\$915,234.00	\$833,882.42	\$2,261,157.91	91.72%

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					\$0.00	0
Very Low	\$52,229.21	2			\$52,229.21	2
Low	\$459,812.28	16			\$459,812.28	16
Moderate					\$0.00	0
Totals:	\$512,041.49	18	\$0.00	0	\$512,041.49	18

Number of Households/Units Produced

Strategy	List Unincorporated and Each Municipality	ELI	VLI	Low	Mod	Total
Purchase Assistance without Rehab	City of North Port		1	3		4
Purchase Assistance without Rehab	City of Sarasota		1	4		5
Purchase Assistance without Rehab	Sarasota County			9		9
Totals:			2	16		18

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality	0 - 25	26 - 40	41 - 61	62+	Total
Purchase Assistance without Rehab	City of North Port	1	1	2		4
Purchase Assistance without Rehab	City of Sarasota		3	2		5
Purchase Assistance without Rehab	Sarasota County	1	4	4		9
Totals:		2	8	8		18

Family Size

Description	List Unincorporated and Each Municipality	1 Person	2- 4 People	5 + People	Total
Purchase Assistance without Rehab	City of North Port	2	2		4
Purchase Assistance without Rehab	City of Sarasota	1	3	1	5
Purchase Assistance without Rehab	Sarasota County	1	7	1	9
Totals:		4	12	2	18

Race (Head of Household)

Description	List Unincorporated and Each Municipality	White	Black	Hispanic	Asian	Amer-Indian	Other	Total
Purchase Assistance without Rehab	City of North Port	3	1					4

Purchase Assistance without Rehab	City of Sarasota	1	1	3				5
Purchase Assistance without Rehab	Sarasota County	3		6				9
Totals:		7	2	9				18

Special Needs (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Devel. Disabled	Home-less	Elderly	Special Needs	Special Needs	Total
Purchase Assistance without Rehab	City of North Port							0
Purchase Assistance without Rehab	City of Sarasota							0
Purchase Assistance without Rehab	Sarasota County					1		1
Totals:						1		1

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

Form 4

Expended Funds

\$512,041.00

Strategy	Full Name	Address	City	Zip Code	Expended Funds	Unit Counted
Purchase Assistance without Rehab	Gauss, Charles	5100 Bullard St	North Port	34287	\$26,141.60	<input type="checkbox"/>



Purchase Assistance without Rehab	Lang, Joshua	2095 Palo Alto Ave	North Port	34286	\$26,377.19	<input type="checkbox"/>
Purchase Assistance without Rehab	McLendon, Katherine Joy	5251 Grobe St	North Port	34287	\$29,792.01	<input type="checkbox"/>
Purchase Assistance without Rehab	Van Meeter, Michael	4245 Avanti Circle	North Port	34287	\$18,352.34	<input type="checkbox"/>
Purchase Assistance without Rehab	Barea, Mariela	1149 Tarpon Avenue	Sarasota	34237-374	\$22,437.20	<input type="checkbox"/>
Purchase Assistance without Rehab	Britton, Teshika	2401 N. Orange Av	Sarasota	34234	\$29,875.22	<input type="checkbox"/>
Purchase Assistance without Rehab	Echemendia, Yaneisy De Armas	3140 Eden Mills Dr	Sarasota	34237	\$30,145.84	<input type="checkbox"/>
Purchase Assistance without Rehab	Guzman, Ofelia	3280 7th Street	Sarasota	34237	\$30,558.61	<input type="checkbox"/>
Purchase Assistance without Rehab	Valenciana Hernandez, Maria	512 Seeds Avenue	Sarasota	34237	\$29,863.80	<input type="checkbox"/>
Purchase Assistance without Rehab	Clavelo, Lazaro	2934 Eagle Way	Sarasota	34235	\$30,154.36	<input type="checkbox"/>
Purchase Assistance without Rehab	Maffei, Alfonzo	836 Searcy Ave	Sarasota	34237	\$29,403.23	<input type="checkbox"/>
Purchase Assistance without Rehab	Primo-Sanchez, Monica	2828 Nassau St	Sarasota	34231	\$30,669.62	<input type="checkbox"/>
Purchase Assistance without Rehab	Puente, Francisca	2338 Lockwood Meadows Ter	Sarasota	34234	\$28,956.15	<input type="checkbox"/>
Purchase Assistance without Rehab	Riggle, Jason	908 Flamingo Rd	Venice	34293	\$30,325.59	<input type="checkbox"/>
Purchase Assistance without Rehab	Rios Paz, Elena Caridad	5419 Kensington St	Sarasota	34232	\$29,299.90	<input type="checkbox"/>
Purchase Assistance without Rehab	Rockwell, Glen Daniel	4590 Corbett Lane	North Port	34288	\$30,255.11	<input type="checkbox"/>
Purchase Assistance without Rehab	Tamayo, Edilberto Armas	1819 Dodge Avenue	Sarasota	34234	\$28,785.23	<input type="checkbox"/>
Purchase Assistance without Rehab	Zamora Valdes, Jessie	3600 Roxane BL	Sarasota	34235	\$30,648.49	<input type="checkbox"/>

Form 5

Special Needs Breakdown

SHIP Expended and Encumbered for Special Needs Applicants

Code(s)	Strategies	Expended Amount	Units	Encumbered Amount	Units
2	Purchase Assistance without Rehab				
3	Owner Occupied Rehabilitation				
11	Special Needs				
12	Special Needs-Rental			\$380,000.00	60

Special Needs Category Breakdown by Strategy

Strategies	Special Needs Category	Expended Amount	Units	Encumbered Amount	Units
(12) Special Needs-Rental	Developmental Disabilities			\$380,000.00	60

LG Submitted Comments: