

# Title: SHIP Annual Report

Report Status: Submitted

Polk County FY 2009/2010

## Form 1

### SHIP Distribution Summary

#### Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
24	FHOP-Fla. Homebuyer Opp. Program	\$207,255.00	27				
1	DPA-New Construc & Exist w/Rehab					\$232,205.70	29
<b>Homeownership Totals:</b>		<b>\$207,255.00</b>	<b>27</b>			<b>\$232,205.70</b>	<b>29</b>

#### Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
<b>Rental Totals:</b>							
<b>Subtotals:</b>		<b>\$207,255.00</b>	<b>27</b>			<b>\$232,205.70</b>	<b>29</b>

### Additional Use of Funds

Use	Expended	Encumbered	Unencumbered
Administrative	\$39,342.98	\$7,324.02	
Homeownership Counseling			
Admin From Program Income		\$1,024.03	
Admin From Disaster Funds			

<b>Totals:</b>	<b>\$246,597.98</b>	<b>27</b>	<b>\$8,348.05</b>	<b>\$232,205.70</b>	<b>29</b>
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### Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$259,416.00
Program Income (Interest)	\$6,680.73
Program Income (Payments)	\$13,800.00
Recaptured Funds	
Disaster Funds	\$0.00

FLHOP Disbursement	\$207,255.00
Other Funds	
Carryover funds from previous year	\$ .00
<b>Total:</b>	<b>\$487,151.73</b>

**\* 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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### Recap of Funding Sources for Units Produced

Source of Funds Produced through June 30th for Units	Amount of Funds Expended to Date	% of Total Value
SHIP Funds Expended	\$207,255.00	100.00%
Public Moneys Expended		.00%
Private Funds Expended		.00%
Owner Contribution		.00%
Total Value of All Units	\$207,255.00	100.00%

### SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$208,846.00	\$259,416.00	80.51%	65%
Construction / Rehabilitation	\$208,846.00	\$259,416.00	80.51%	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				\$ .00	.00%
Very Low	\$22,990.00		\$80,000.00	\$102,990.00	36.80%
Low	\$66,665.00		\$80,205.70	\$146,870.70	52.47%
Moderate	\$117,600.00		\$72,000.00	\$189,600.00	67.74%
Over 120%-140%				\$ .00	.00%
Over 140%				\$ .00	.00%
<b>Totals:</b>	<b>\$207,255.00</b>	<b>\$ .00</b>	<b>\$232,205.70</b>	<b>\$439,460.70</b>	<b>157.01%</b>

**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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**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					\$ .00	0
Very Low	\$22,990.00	3			\$22,990.00	3
Low	\$66,665.00	9			\$66,665.00	9
Moderate	\$117,600.00	15			\$117,600.00	15
Over 120%-140%					\$ .00	0
Over 140%					\$ .00	0
<b>Totals:</b>	\$207,255.00	27	\$ .00	0	\$207,255.00	27

**Form 3**

**Number of Households/Units Produced**

Description	List Unincorporated and Each Municipality	ELI	VLI	Low	Mod	Over 120%-140%	Over 140%	Total
FHOP-Fla. Homebuyer Opp. Program	Polk/Auburndale				3			3
FHOP-Fla. Homebuyer Opp. Program	Polk/Bartow			2	1			3
FHOP-Fla. Homebuyer Opp. Program	Polk/Dundee		1	1				2
FHOP-Fla. Homebuyer Opp. Program	Polk/Ft. Meade			1				1
FHOP-Fla. Homebuyer Opp. Program	Polk/Haines City		1	1	1			3
FHOP-Fla. Homebuyer Opp. Program	Polk/Lakeland		1	4	5			10
FHOP-Fla. Homebuyer Opp. Program	Polk/Mulberry				3			3
FHOP-Fla. Homebuyer Opp. Program	Winter Haven				1			1
FHOP-Fla. Homebuyer Opp. Program	Polk/Davenport				1			1
<b>Totals:</b>			<b>3</b>	<b>9</b>	<b>15</b>			<b>27</b>

**Characteristics/Age (Head of Household)**

Description	List Unincorporated and Each Municipality	Family Size				Total
		0 - 25	26 - 40	41 - 61	62+	
FHOP-Fla. Homebuyer Opp. Program	Polk/Auburndale	1	1	1		3
FHOP-Fla. Homebuyer Opp. Program	Polk/Bartow	1	2			3
FHOP-Fla. Homebuyer Opp. Program	Polk/Dundee		1	1		2
FHOP-Fla. Homebuyer Opp. Program	Polk/Ft. Meade	1				1
FHOP-Fla. Homebuyer Opp. Program	Polk/Haines City			3		3
FHOP-Fla. Homebuyer Opp. Program	Polk/Lakeland	3	5	1		9
FHOP-Fla. Homebuyer Opp. Program	Polk/Mulberry	1	3			4
FHOP-Fla. Homebuyer Opp. Program	Winter Haven		1			1
FHOP-Fla. Homebuyer Opp. Program	Polk/Davenport			1		1
<b>Totals:</b>		<b>7</b>	<b>13</b>	<b>7</b>		<b>27</b>

### Family Size

Description	List Unincorporated and Each Municipality	Family Size			Total
		1 Person	2- 4 People	5 + People	
FHOP-Fla. Homebuyer Opp. Program	Polk/Auburndale		3		3
FHOP-Fla. Homebuyer Opp. Program	Polk/Bartow	2		1	3
FHOP-Fla. Homebuyer Opp. Program	Polk/Dundee	1	1		2
FHOP-Fla. Homebuyer Opp. Program	Polk/Ft. Meade		1		1
FHOP-Fla. Homebuyer Opp. Program	Polk/Haines City	1	1	1	3
FHOP-Fla. Homebuyer Opp. Program	Polk/Lakeland	2	5	2	9

FHOP-Fla. Homebuyer Opp. Program	Polk/Mulberry	1	3		4
FHOP-Fla. Homebuyer Opp. Program	Winter Haven	1			1
FHOP-Fla. Homebuyer Opp. Program	Polk/Davenport			1	1
<b>Totals:</b>		<b>8</b>	<b>14</b>	<b>5</b>	<b>27</b>

**Race (Head of Household)**

Description	List Unincorporated and Each Municipality	White	Black	Hispanic	Asian	Amer-Indian	Other	Total
FHOP-Fla. Homebuyer Opp. Program	Polk/Auburndale	3						3
FHOP-Fla. Homebuyer Opp. Program	Polk/Bartow	3						3
FHOP-Fla. Homebuyer Opp. Program	Polk/Dundee		2					2
FHOP-Fla. Homebuyer Opp. Program	Polk/Ft. Meade			1				1
FHOP-Fla. Homebuyer Opp. Program	Polk/Haines City		2	1				3
FHOP-Fla. Homebuyer Opp. Program	Polk/Lakeland	4	3		2			9
FHOP-Fla. Homebuyer Opp. Program	Polk/Mulberry	2	1	1				4
FHOP-Fla. Homebuyer Opp. Program	Winter Haven			1				1
FHOP-Fla. Homebuyer Opp. Program	Polk/Davenport	1						1
<b>Totals:</b>		<b>13</b>	<b>8</b>	<b>4</b>	<b>2</b>			<b>27</b>

**Special Needs (Any Member of Household)**

Description	List Unincorporated and Each Municipality	Farm Worker	Devel. Disabled	Homeless	Elderly	Special Needs	Special Needs	Total
FHOP-Fla. Homebuyer Opp. Program	Polk/Auburndale							0

FHOP-Fla. Homebuyer Opp. Program	Polk/Bartow							0
FHOP-Fla. Homebuyer Opp. Program	Polk/Dundee							0
FHOP-Fla. Homebuyer Opp. Program	Polk/Ft. Meade							0
FHOP-Fla. Homebuyer Opp. Program	Polk/Haines City							0
FHOP-Fla. Homebuyer Opp. Program	Polk/Lakeland							0
FHOP-Fla. Homebuyer Opp. Program	Polk/Mulberry							0
FHOP-Fla. Homebuyer Opp. Program	Winter Haven							0
FHOP-Fla. Homebuyer Opp. Program	Polk/Davenport							0
<b>Totals:</b>								<b>0</b>

**Form 4**

Incentive Strategy:

Adopting Ordinance or Resolution Number or identify local policy:

Implementation Schedule (Date):

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

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

**Expended Funds**

**\$207,255.00**

Strategy	Full Name	Address	City	Zip Code	Expended Funds	Unit Counted
FHOP-Fla. Homebuyer Opp. Program	Guy L. & Janet L. Williams	564 Hatchwood Drive, Haines City, FL.	Polk-Haines City	33844	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Kelly Ragon Jesse	2307 Bowers Road, Bartow, FL. 33830	Polk-Bartow	33830	\$5,800.00	C

FHOP-Fla. Homebuyer Opp. Program	Reynaldo R. Camacho	804 6th Street, Fort Meade, FL. 33841	Polk-Ft. Meade	33841	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Timothy W. Morris	1212 Lysiloma Avenue, Winter Haven, FL. 33880	Polk-Winter Hven	33880	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Althia A. Brown	7209 Cedarcrest Blvd., Lakeland, FL. 33801	Polk-Lakeland	33801	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Chad E. & Sarah F. Whitaker	6783 Canbury Drive, Lakeland, FL. 33809	Polk-Lakeland	33809	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Stephanie R. Davis	7119 Cedarcrest Blvd., Lakeland, FL. 33810	Polk-Lakeland	33810	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Andrew J. Seabon Sr	310 Lincoln Avenue, Dundee, FL. 33838	Polk-Dundee	33838	\$6,990.00	C
FHOP-Fla. Homebuyer Opp. Program	Benjamin & Denise Smith	119 Corey Court, Auburndale, FL. 33823	Polk-Auburndale	33823	\$7,800.00	C
FHOP-Fla. Homebuyer Opp. Program	Christopher U (& Shea L.) Hall	4037 April Street North, Lakeland, FL. 33813	Polk-Lakeland	33813	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Veronica (Daniel) Cardenas	2103 W. Daughtery Road, Lakeland, FL. 33810	Polk-Lakeland	33810	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Melissa A. Proctor-Bell and Michael D. Bell	4380 Stoney River Drive, Mulberry, FL. 33860	Polk-Mulberry	33860	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Benjamin E. Long III (Michael J. Long)	830 Cooperleaf Lane, Bartow, FL. 33830	Polk-Bartow	33830	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Roberto Enrique Romero-Espinosa	2817 Oak Hammock Loop, Mulberry, FL. 33860	Polk-Mulberry	33860	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Christopher Antoine McLachlan & Tanzania McLachlan	2838 Woodland Medow Road, Mulberry, FL. 33860	Polk-Mulberry	33860	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Christina S. ( & Alfred N. ) Williams	100 Costa Loop, Auburndale, FL. 33823	Polk-Auburndale	33823	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Andrew M. (& Kelly L. ) Strohm	3330 Winchester Estates Circle, Lakeland, FL. 33810	Polk-Lakeland	33810	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Sherilyn D. Fuller	7206 Tom Paine Road, Bartow, FL. 33830	Polk-Bartow	33830	\$4,256.00	C

FHOP-Fla. Homebuyer Opp. Program	Blake Swinson	3275 Winchester Estates Circle, Lakeland, FL. 33810	Polk-Lakeland	33810	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Rebekah E. Moses and Jason A. Howell	3221 Enclave Blvd., Mulberry, FL. 33860	Polk-Mulberry	33860	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Roberto C. Rivera ( & Dania A. Fuentes)	3130 Winchester Estates Circle, Lakeland, FL. 33810	Polk-Lakeland	33810	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Emily ( & Sean) Stutz	660 Berkley Point Drive, Auburndale, FL. 33823	Polk- Auburndale	33823	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Ismael (& Elizabeth ) Rodriguez	592 Hatchwood Drive, Haines Ctiy, FL. 33844	Polk-Haines City	33844	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Emma Jean Downing	627 Stonehaven Drive, Haines City, FL. 33844	Polk-Haines City	33844	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Richard & Dianne M. Sacks	1009 Mystery Circle, Davenport, FL. 33837	Polk- Davenport	33837	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Sandra Berry	2819 Stonewood Circle, Lakeland, FL. 33810	Polk-Lakeland	33810	\$8,000.00	C
FHOP-Fla. Homebuyer Opp. Program	Paddricca D., Clemons	525 Ridges Drive, Dundee, FL. 33838	Polk-Dundee	33838	\$6,409.00	C

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