

# Title: SHIP Annual Report

Report Status: Unsubmitted  
w/Extension

Charlotte County FY 2022/2023 Closeout

Form 1

## SHIP Distribution Summary

### Homeownership

| Code | Strategy             | Expended Amount | Units | Encumbered Amount | Units | Unencumbered Amount | Units |
|------|----------------------|-----------------|-------|-------------------|-------|---------------------|-------|
| 2    | Purchase Assistance  | \$193,440.00    | 7     |                   |       |                     |       |
| 2    |                      | \$418,704.00    | 15    |                   |       |                     |       |
| 3    | Owner Occupied Rehab | \$210,978.28    | 6     |                   |       |                     |       |
| 5    | Disaster Assistance  | \$521,553.82    | 82    |                   |       |                     |       |
| 5    |                      | \$18,441.78     | 5     |                   |       |                     |       |
| 6    | Emergency Repair     | \$58,855.00     | 6     |                   |       |                     |       |

**Homeownership Totals:** \$1,421,972.88 121

### Rentals

| Code | Strategy                        | Expended Amount | Units | Encumbered Amount | Units | Unencumbered Amount | Units |
|------|---------------------------------|-----------------|-------|-------------------|-------|---------------------|-------|
| 14   | Non-profit/Special needs Rental | \$203,432.00    | 8     |                   |       |                     |       |
| 21   | Multi-Family Construction       | \$400,000.00    | 8     |                   |       |                     |       |

**Rental Totals:** \$603,432.00 16

**Subtotals:** \$2,025,404.88 137

## Additional Use of Funds

| Use                       | Expended     | Percentage |
|---------------------------|--------------|------------|
| Administrative            | \$182,418.00 | 9.99 %     |
| Homeownership Counseling  |              |            |
| Admin From Program Income | \$22,736.00  | 4.52 %     |
| Admin From Disaster Funds |              | .00 %      |
| Admin From HHRP           | \$713,445.00 | 10.00 %    |

**Totals:** \$2,230,558.88 137 \$0.00 \$0.00

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

| Source of Funds                    | Amount                 |
|------------------------------------|------------------------|
| State Annual Distribution          | \$1,824,182.00         |
| Program Income (Interest)          | \$48,223.00            |
| Program Income (Payments)          | \$454,720.27           |
| Recaptured Funds                   | \$0.00                 |
| Disaster Funds                     | \$572,000.00           |
| HHRP Funds                         | \$7,134,450.00         |
| Carryover funds from previous year | \$3,237.52             |
| <b>Total:</b>                      | <b>\$10,036,812.79</b> |

**\* Carry Forward to Next Year: \$7,092,808.91**

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         | 402   | 447   | 621   | 814   | 1,007 |
| VLI         | 671   | 719   | 863   | 997   | 1,112 |
| LOW         | 1,073 | 1,150 | 1,381 | 1,595 | 1,780 |
| MOD         | 1,611 | 1,726 | 2,073 | 2,394 | 2,670 |
| Up to 140%  | 1,879 | 2,014 | 2,418 | 2,793 | 3,115 |

### 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                                  | \$2,025,404.88                   | 100.00%          |
| Public Moneys Expended                               |                                  | .00%             |
| Private Funds Expended                               |                                  | .00%             |
| Owner Contribution                                   |                                  | .00%             |
| Total Value of All Units                             | \$2,025,404.88                   | 100.00%          |

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

| Compliance Category           | SHIP Funds     | Trust Funds    | % of Trust Fund | FL Statute Minimum % |
|-------------------------------|----------------|----------------|-----------------|----------------------|
| Homeownership                 | \$1,421,972.88 | \$2,399,419.52 | 59.26%          | 65%                  |
| Construction / Rehabilitation | \$1,539,329.16 | \$2,399,419.52 | 64.15%          | 75%                  |

### Program Compliance - Income Set-Asides

| Income Category               | SHIP Funds   | Total Available Funds % * | Totals of Percentages |
|-------------------------------|--------------|---------------------------|-----------------------|
| Extremely Low                 | \$630,174.80 | 21.71%                    | EL+VL: 33.33%         |
| Very Low                      | \$337,260.04 | 11.62%                    |                       |
| Low                           | \$991,823.61 | 34.17%                    | EL+VL+L: 67.51%       |
| Moderate                      | \$47,704.65  | 1.64%                     |                       |
| Over 120%-140%                | \$ .00       | .00%                      |                       |
| <b>Totals:</b> \$2,006,963.10 |              | 69.15%                    |                       |

### 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   | \$471,186.30                         | 13                             | \$158,988.50            | 25                 | \$630,174.80              | 38            |
| Very Low        | \$133,618.00                         | 4                              | \$203,642.04            | 32                 | \$337,260.04              | 36            |
| Low             | \$773,860.33                         | 25                             | \$217,963.28            | 32                 | \$991,823.61              | 57            |
| Moderate        | \$47,704.65                          | 1                              | \$ .00                  | 0                  | \$47,704.65               | 1             |
| Over 120%-140%  | \$ .00                               | 0                              | \$ .00                  | 0                  | \$ .00                    | 0             |
| <b>Totals:</b>  | \$1,426,369.28                       | 43                             | \$580,593.82            | 89                 | \$2,006,963.10            | 132           |

### Form 3

### Number of Households/Units Produced

| Strategy                          | List Unincorporated and Each Municipality | ELI       | VLI       | Low       | Mod      | Over 140% | Total      |
|-----------------------------------|---|-----------|-----------|-----------|----------|-----------|------------|
| Disaster Assistance               | Unincorporated                            | 22        | 26        | 26        |          |           | 74         |
| Disaster Assistance               | Punta Gorda                               | 1         | 2         | 5         |          |           | 8          |
| Non-profit / Special needs Rental | Unincorporated                            | 6         | 2         |           |          |           | 8          |
| Purchase Assistance               | Unincorporated                            |           |           | 7         |          |           | 7          |
|                                   | Unincorporated                            |           | 1         | 14        |          |           | 15         |
| Emergency Repair                  | Punta Gorda                               | 2         |           |           |          |           | 2          |
| Emergency Repair                  | Unincorporated                            |           | 3         | 1         |          |           | 4          |
|                                   |   |           |           |           |          |           | 0          |
| Owner Occupied Rehab              | Unincorporated                            | 1         | 1         | 3         | 1        |           | 6          |
| Multi-Family Construction         | Punta Gorda                               | 6         | 1         | 1         |          |           | 8          |
| <b>Totals:</b>                    |   | <b>38</b> | <b>36</b> | <b>57</b> | <b>1</b> |           | <b>132</b> |

### Characteristics/Age (Head of Household)

| Description                       | List Unincorporated and Each Municipality | 0 - 25   | 26 - 40   | 41 - 61   | 62+       | Total      |
|-----------------------------------|---|----------|-----------|-----------|-----------|------------|
| Disaster Assistance               | Unincorporated                            |          | 4         | 15        | 55        | 74         |
| Disaster Assistance               | Punta Gorda                               |          | 3         | 2         | 3         | 8          |
| Non-profit / Special needs Rental | Unincorporated                            |          |           | 3         | 5         | 8          |
| Purchase Assistance               | Unincorporated                            |          | 6         |           | 1         | 7          |
|                                   | Unincorporated                            | 1        | 11        | 3         |           | 15         |
| Emergency Repair                  | Punta Gorda                               |          |           | 2         |           | 2          |
| Emergency Repair                  | Unincorporated                            |          |           |           | 4         | 4          |
|                                   |   |          |           |           |           | 0          |
| Owner Occupied Rehab              | Unincorporated                            |          | 1         | 2         | 3         | 6          |
| Multi-Family Construction         | Punta Gorda                               | 1        | 2         | 5         |           | 8          |
| <b>Totals:</b>                    |   | <b>2</b> | <b>27</b> | <b>32</b> | <b>71</b> | <b>132</b> |

## Family Size

| Description                       | List Unincorporated and Each Municipality | 1 Person  | 2- 4 People | 5 + People | Total      |
|-----------------------------------|---|-----------|-------------|------------|------------|
| Disaster Assistance               | Unincorporated                            | 36        | 35          | 3          | 74         |
| Disaster Assistance               | Punta Gorda                               | 2         | 5           |            | 7          |
| Non-profit / Special needs Rental | Unincorporated                            | 7         | 1           |            | 8          |
| Purchase Assistance               | Unincorporated                            |           | 7           |            | 7          |
|                                   | Unincorporated                            |           | 14          | 1          | 15         |
| Emergency Repair                  | Punta Gorda                               | 1         | 1           |            | 2          |
| Emergency Repair                  | Unincorporated                            | 1         | 3           |            | 4          |
|                                   |   |           |             |            | 0          |
| Owner Occupied Rehab              | Unincorporated                            | 4         | 1           | 1          | 6          |
| Multi-Family Construction         | Punta Gorda                               | 3         | 5           |            | 8          |
| <b>Totals:</b>                    |   | <b>54</b> | <b>72</b>   | <b>5</b>   | <b>131</b> |

## Race (Head of Household)

| Description                       | List Unincorporated and Each Municipality | White | Black | Hispanic | Asian | Amer-Indian | Other | Total |
|-----------------------------------|---|-------|-------|----------|-------|-------------|-------|-------|
| Disaster Assistance               | Unincorporated                            | 61    | 6     | 5        | 2     |             |       | 74    |
| Disaster Assistance               | Punta Gorda                               | 6     | 1     |          |       |             |       | 7     |
| Non-profit / Special needs Rental | Unincorporated                            | 6     |       |          |       |             | 2     | 8     |

|                           |                |            |           |           |          |  |          |            |
|---------------------------|----------------|------------|-----------|-----------|----------|--|----------|------------|
| Purchase Assistance       | Unincorporated | 3          | 1         | 3         |          |  |          | 7          |
|                           | Unincorporated | 13         | 1         | 1         |          |  |          | 15         |
| Emergency Repair          | Punta Gorda    | 2          |           |           |          |  |          | 2          |
| Emergency Repair          | Unincorporated | 2          |           | 2         |          |  |          | 4          |
|                           |                |            |           |           |          |  |          | 0          |
| Owner Occupied Rehab      | Unincorporated | 6          |           |           |          |  |          | 6          |
| Multi-Family Construction | Punta Gorda    | 3          | 2         | 3         |          |  |          | 8          |
| <b>Totals:</b>            |                | <b>102</b> | <b>11</b> | <b>14</b> | <b>2</b> |  | <b>2</b> | <b>131</b> |

### Demographics (Any Member of Household)

| Description                       | List Unincorporated and Each Municipality | Farm Worker | Home-less | Elderly   | Total     |
|-----------------------------------|---|-------------|-----------|-----------|-----------|
| Disaster Assistance               | Unincorporated                            |             |           | 53        | 53        |
| Disaster Assistance               | Punta Gorda                               |             |           | 2         | 2         |
| Non-profit / Special needs Rental | Unincorporated                            |             |           | 5         | 5         |
| Purchase Assistance               | Unincorporated                            |             |           | 1         | 1         |
|                                   | Unincorporated                            |             |           |           | 0         |
| Emergency Repair                  | Punta Gorda                               |             |           |           | 0         |
| Emergency Repair                  | Unincorporated                            |             |           | 4         | 4         |
|                                   |   |             |           |           | 0         |
| Owner Occupied Rehab              | Unincorporated                            |             |           | 2         | 2         |
| Multi-Family Construction         | Punta Gorda                               |             | 4         |           | 4         |
| <b>Totals:</b>                    |   |             | <b>4</b>  | <b>67</b> | <b>71</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 |
|---------------------------|----------------------|----------------|---------------------------|
| Disaster Assistance       | Government Employee  | 6,457.01       | 1                         |
| Multi-Family Construction | Retail Sales         | 50,000.00      | 1                         |

## Form 4

### Status of Incentive Strategies

| Incentive              | Description (If Other) | Category | Status | Year Adopted (or N/A) |
|------------------------|------------------------|----------|--------|-----------------------|
| Expedited permitting   |                        |          |        |                       |
| Ongoing review process |                        |          |        |                       |

## Support Services

## Other Accomplishments

## Availability for Public Inspection and Comments

## Life-to-Date Homeownership Default and Foreclosure

Total SHIP Purchase Assistance Loans: **532**

### Mortgage Foreclosures

A. Very low income households in foreclosure:

B. Low income households in foreclosure:

C. Moderate households in foreclosure:

Foreclosed Loans Life-to-date: **0**

SHIP Program Foreclosure Percentage Rate Life to Date: **0.00**

### Mortgage Defaults

A. Very low income households in default:

B. Low income households in default:

C. Moderate households in default:

Defaulted Loans Life-to-date: **0**

SHIP Program Default Percentage Rate Life to Date: **0.00**

## Strategies and Production Costs

| Strategy                        | Average Cost |
|---------------------------------|--------------|
|                                 | \$21,857.29  |
| Disaster Assistance             | \$6,360.41   |
| Emergency Repair                | \$9,809.17   |
| Multi-Family Construction       | \$50,000.00  |
| Non-profit/Special needs Rental | \$25,429.00  |
| Owner Occupied Rehab            | \$35,163.05  |
| Purchase Assistance             | \$27,634.29  |

## Expended Funds

Total Unit Count: **132**

Total Expended Amount: **\$2,006,963.10**

| Strategy                        | Full Name               | Address                  | City           | Zip Code | Expended Funds | FY if Unit Already Counted |
|---------------------------------|-------------------------|--------------------------|----------------|----------|----------------|----------------------------|
| Disaster Assistance             | Kristin Morris (Jewell) | 18536 Gamewell Ave       | Port Charlotte | 33948    | \$1,145.15     |                            |
| Disaster Assistance             | Kory Kossick            | 26129 Cuneo Rd           | Punta Gorda    | 33955    | \$4,234.70     |                            |
| Disaster Assistance             | Raeshamia Smith         | 3039 Tarrywood TE        | Punta Gorda    | 33983    | \$5,920.00     |                            |
| Non-profit/Special needs Rental | Paul Schaffer           | 20109 Helms Way Unit 1   | Port Charlotte | 33952    | \$25,429.00    |                            |
| Non-profit/Special needs Rental | Kimberly Smith          | 20117 Helms Way Unit 02  | Port Charlotte | 33952    | \$25,429.00    |                            |
| Non-profit/Special needs Rental | Susan Richardson        | 20133 Helms Way Unit 04  | Port Charlotte | 33952    | \$25,429.00    |                            |
| Non-profit/Special needs Rental | Deborah Williams        | 20141 Helms Way Unit 05  | Port Charlotte | 33952    | \$25,429.00    |                            |
| Non-profit/Special needs Rental | Concetta Dinicola       | 20149 Helms Way Unit 06  | Port Charlotte | 33952    | \$25,429.00    |                            |
| Non-profit/Special needs Rental | Rebecca Ayres           | 20108 Helms Way Unit 08  | Port Charlotte | 33952    | \$25,429.00    |                            |
| Non-profit/Special needs Rental | Michael Sheppard        | 20173 Helms Way Unit 09  | Port Charlotte | 33952    | \$25,429.00    |                            |
| Non-profit/Special needs Rental | Duane Horner            | 20181 Helms Way Unit 10  | Port Charlotte | 33952    | \$25,429.00    |                            |
| Disaster Assistance             | Magdalena Garcia        | 23321 Olean Blvd         | Port Charlotte | 33980    | \$3,600.00     |                            |
| Purchase Assistance             | Tonieshia Nealon        | 26180 Notre Dame Blvd.   | Punta Gorda    | 33955    | \$28,080.00    |                            |
| Purchase Assistance             | Vincent Cuozzo          | 336 Verdun Street        | Port Charlotte | 33954    | \$27,560.00    |                            |
| Purchase Assistance             | Ashley Hernandez        | 331 Verdun Street        | Port Charlotte | 33954    | \$27,040.00    |                            |
| Disaster Assistance             | Persephone Mathis       | 2511 Luther Rd, Apt 1027 | Punta Gorda    | 33983    | \$1,221.00     |                            |
| Purchase Assistance             | Ashley Dahl             | 14070 Chamberlain Blvd.  | Port Charlotte | 33953    | \$26,520.00    |                            |
| Purchase Assistance             | Juliet German-Rives     | 29342 Lillis Street      | Punta Gorda    | 33982    | \$29,120.00    |                            |
| Purchase Assistance             | Hollianne Fitch         | 315 Coast Line Blvd.     | Punta Gorda    | 33982    | \$28,080.00    |                            |
| Purchase Assistance             | Alvara Vega-Navarro     | 2177 Redmond Street      | Port Charlotte | 33948    | \$27,040.00    |                            |
| Disaster Assistance             | Lynda Carden            | 8418 Osprey Rd           | Englewood      | 34224    | \$9,575.00     |                            |
| Disaster Assistance             | Kourtnee Robeck         | 351 Areca St             | Englewood      | 33950    | \$10,036.70    |                            |
| Disaster Assistance             | George Thomson          | 21283 Coulton Ave        | Port Charlotte | 33952    | \$7,300.00     |                            |
| Disaster Assistance             | Courtney Schad          | 1078 Navigator Rd Unit 1 | Punta Gorda    | 33983    | \$1,895.00     |                            |

|                     |                   |                              |                |       |             |  |
|---------------------|-------------------|------------------------------|----------------|-------|-------------|--|
| Disaster Assistance | Mark Uffenbeck    | 431 Yeager Street            | Port Charlotte | 33954 | \$6,268.00  |  |
| Disaster Assistance | Robert Hudson     | 23079 Langdon Avenue         | Port Charlotte | 33954 | \$7,220.00  |  |
| Disaster Assistance | Ronald Weber      | 22 Brink Avenue              | Punta Gorda    | 33950 | \$2,500.00  |  |
| Disaster Assistance | Barbara Hall      | 1193 Guild St                | Port Charlotte | 33952 | \$12,000.00 |  |
| Disaster Assistance | Jason Diaz        | 189 Forrest Avenue           | Port Charlotte | 33952 | \$3,520.00  |  |
| Disaster Assistance | Donatila Martinez | 23463 Quasar Blvd            | Port Charlotte | 33980 | \$11,789.84 |  |
| Disaster Assistance | Jacqueline Meeks  | 1113 Northview Street        | Port Charlotte | 33952 | \$3,000.00  |  |
| Disaster Assistance | Douglas Denis     | 25422 Kowloon Lane           | Punta Gorda    | 33983 | \$6,152.00  |  |
| Disaster Assistance | Minh Ho           | 205 Mocha Court              | Punta Gorda    | 33983 | \$5,676.00  |  |
| Disaster Assistance | Chester Mann      | 21 Bunker Terrace            | Rotonda West   | 33947 | \$11,972.21 |  |
| Disaster Assistance | Christopher Dixon | 18671 Kerrville Circle       | Port Charlotte | 33948 | \$3,635.00  |  |
| Disaster Assistance | Anna Cranmer      | 143 Harrisburg Street        | Port Charlotte | 33954 | \$9,276.00  |  |
| Disaster Assistance | Linda Woodham     | 18329 Wolbrette Circle       | Port Charlotte | 33948 | \$5,880.00  |  |
| Disaster Assistance | David Clapper     | 29200 Jones Loop Rd, Lot 269 | Punta Gorda    | 33950 | \$6,700.00  |  |
| Disaster Assistance | Diane Martin      | 15011 Dahlgren Avenue        | Port Charlotte | 33953 | \$8,053.00  |  |
| Disaster Assistance | Linda Laroche     | 3442 Dover Drive             | Punta Gorda    | 33983 | \$5,121.24  |  |
| Disaster Assistance | Garry Walter      | 10491 Marion Street          | Englewood      | 34224 | \$12,000.00 |  |
| Disaster Assistance | Margaret Hiestand | 17520 Ainse Court            | Punta Gorda    | 33955 | \$10,400.00 |  |
| Disaster Assistance | Walter Root       | 21185 Chatburn Avenue        | Port Charlotte | 33952 | \$3,950.00  |  |
| Disaster Assistance | Michael Dillon    | 2801 Starlite Lane           | Port Charlotte | 33952 | \$2,980.00  |  |
| Disaster Assistance | Leroy Lindsey     | 947 Linnaen Terrace NW       | Port Charlotte | 33948 | \$4,320.00  |  |
| Disaster Assistance | Wanda Sapp        | 574 Lowell Avenue NW         | Port Charlotte | 33952 | \$4,740.00  |  |
| Disaster Assistance | Alena Selberg     | 3129 Tarrytown Street        | Port Charlotte | 33952 | \$6,437.00  |  |
| Disaster Assistance | Andree Lambert    | 26351 Deep Creek Blvd        | Punta Gorda    | 33983 | \$6,419.00  |  |
| Disaster Assistance | Karen Woods       | 105 Antis Drive              | Rotonda West   | 33947 | \$6,000.00  |  |



|                     |                           |                                 |                |       |             |  |
|---------------------|---------------------------|---------------------------------|----------------|-------|-------------|--|
|                     | Mary Catherine Kane       | 12071 Coleman Avenue            | Port Charlotte | 33981 | \$26,624.00 |  |
| Disaster Assistance | Russell McDowell          | 513 Cheshire Street             | Port Charlotte | 33953 | \$6,056.00  |  |
| Disaster Assistance | Donna Sucato              | 27129 Deep Creek Blvd.          | Punta Gorda    | 33983 | \$2,434.00  |  |
| Disaster Assistance | Daniel Daurizio           | 873 McMahan Ave                 | Port Charlotte | 33948 | \$2,960.00  |  |
| Disaster Assistance | Mary Donlon               | 40120 Little Farm Rd            | Punta Gorda    | 33982 | \$12,000.00 |  |
| Disaster Assistance | Tresha Walker             | 22446 New York Ave              | Port Charlotte | 33952 | \$12,000.00 |  |
| Disaster Assistance | Stephan Ferreira          | 1205 Pine Court                 | Port Charlotte | 33980 | \$4,335.00  |  |
| Disaster Assistance | Elizabeth Tancredi        | 1345 Orlando Blvd               | Port Charlotte | 33952 | \$4,600.00  |  |
| Disaster Assistance | Edith Thompson-Pinnock    | 1365 Mager Street               | Port Charlotte | 33952 | \$5,200.00  |  |
| Disaster Assistance | Vickie Patterson          | 464 Dewhurst Street             | Port Charlotte | 33954 | \$3,740.00  |  |
| Disaster Assistance | Jennifer Deroche          | 17228 Bonnie Avenue             | Port Charlotte | 33954 | \$3,454.00  |  |
| Disaster Assistance | Connie Becerril           | 173 Monica Street               | Port Charlotte | 33954 | \$7,147.32  |  |
| Disaster Assistance | Brenda Rhodes             | 22519 Alcorn Avenue             | Port Charlotte | 33952 | \$4,406.00  |  |
| Disaster Assistance | Linda Bradfish            | 21295 Hawthorne Avenue          | Port Charlotte | 33954 | \$5,020.00  |  |
| Disaster Assistance | Ernest Wolff              | 66 Baytree Drive                | Rotonda West   | 33947 | \$4,900.00  |  |
| Disaster Assistance | Maritza Bonilla           | 1533 Alton Road                 | Port Charlotte | 33952 | \$9,000.00  |  |
| Disaster Assistance | Karen Crawford Farrington | 20405 Bachmann Blvd             | Port Charlotte | 33954 | \$3,071.00  |  |
| Disaster Assistance | Lesley Harrington         | 21569 Gibraltar Drive           | Port Charlotte | 33952 | \$5,000.00  |  |
| Disaster Assistance | Jan Meades                | 58 Mark Twain Lane              | Rotonda West   | 33947 | \$7,834.00  |  |
| Disaster Assistance | Peter Milo                | 18495 Timothy Avenue            | Port Charlotte | 33948 | \$2,586.32  |  |
| Disaster Assistance | Rayetta Myers             | 5052 San Rocco Drive            | Punta Gorda    | 33950 | \$6,240.00  |  |
| Disaster Assistance | James O'Brien             | 11035 Gulfstream Blvd           | Englewood      | 34224 | \$5,200.00  |  |
| Disaster Assistance | Elaine Oliver             | 19415 Edgewater Drive           | Port Charlotte | 33948 | \$2,250.00  |  |
| Disaster Assistance | Linda Piper               | 130 Gregory Drive               | Port Charlotte | 33952 | \$3,124.00  |  |
| Disaster Assistance | Regina Saladino           | 1354 Rock Dove Court, Unit A202 | Punta Gorda    | 33950 | \$1,244.00  |  |

|                     |                   |                                |                |       |             |  |
|---------------------|-------------------|--------------------------------|----------------|-------|-------------|--|
| Disaster Assistance | Victoria Stephens | 21267 Gertrde Avenue, Unit 208 | Port Charlotte | 33952 | \$3,900.00  |  |
| Disaster Assistance | Barbara Zufall    | 1000 Kings Hwy, Unit 443       | Port Charlotte | 33980 | \$2,750.00  |  |
| Disaster Assistance | Jon Burdett       | 581 Clearview Drive            | Port Charlotte | 33953 | \$6,020.00  |  |
| Disaster Assistance | Nam Huynh         | 284 Annapolis Lane             | Rotonda West   | 33947 | \$5,898.00  |  |
| Disaster Assistance | Thomas Gagliardi  | 21078 Edgewater Dr             | Port Charlotte | 33952 | \$8,508.10  |  |
| Disaster Assistance | Louis Della Penna | 289 Orange Dr NW               | Port Charlotte | 33952 | \$739.22    |  |
| Disaster Assistance | Eleonore Fleury   | 2474 Lakeshore Circle          | Port Charlotte | 33952 | \$7,242.00  |  |
| Disaster Assistance | Augusto Araujo    | 2772 Mauritania Rd             | Punta Gorda    | 33983 | \$6,385.00  |  |
| Disaster Assistance | Williamson Wanda  | 13403 Ballon Ave               | Port Charlotte | 33981 | \$4,734.00  |  |
| Disaster Assistance | Maryrose Clyne    | 9070 Pinehaven Way             | Englewood      | 34224 | \$9,628.00  |  |
| Emergency Repair    | Heather Irvin     | 3186 Broder Dr                 | Punta Gorda    | 33983 | \$10,000.00 |  |
| Disaster Assistance | Deborah Szewczyk  | 1586 Harbor Blvd               | Port Charlotte | 33952 | \$6,457.01  |  |
| Emergency Repair    | Amaury Vecino     | 418 Kostner St                 | Port Charlotte | 33954 | \$8,855.00  |  |
| Disaster Assistance | Theresa Scott     | 1115 Martha Pl                 | Englewood      | 34223 | \$12,000.00 |  |
| Disaster Assistance | Richard Busse     | 4444 Melbourne St              | Port Charlotte | 33980 | \$12,000.00 |  |
| Disaster Assistance | Neysa Febus       | 925 Spring View Ave NW         | Port Charlotte | 33948 | \$12,000.00 |  |
| Disaster Assistance | Patricia Hook     | 1314 Beacon Dr                 | Port Charlotte | 33952 | \$11,986.50 |  |
| Emergency Repair    | David Cox Sr.     | 20198 Hamilton Ave             | Port Charlotte | 33952 | \$10,000.00 |  |
| Disaster Assistance | Coleen Bailey     | 124 Dow Rd                     | Port Charlotte | 33952 | \$12,000.00 |  |
| Disaster Assistance | Marie Brun        | 516 Clearview Dr               | Port Charlotte | 33953 | \$12,000.00 |  |
| Emergency Repair    | Erasmio Conde     | 21490 Gladis Ave               | Port Charlotte | 33952 | \$10,000.00 |  |
| Disaster Assistance | Steve Trought     | 21977 Belinda Ave              | Port Charlotte | 33952 | \$11,979.00 |  |
| Disaster Assistance | Nelida Maldonado  | 2512 Conway Blvd               | Port Charlotte | 33952 | \$9,538.30  |  |
|                     | Heather Lojacono  | 17076 Greenan Avenue           | Port Charlotte | 33948 | \$26,000.00 |  |
| Emergency Repair    | Stacey Little     | 2516 Carmen St                 | Punta Gorda    | 33950 | \$10,000.00 |  |
|                     | Cunha             |                                |                |       | \$4,236.30  |  |
|                     | Destiny Sharples  |                                |                |       | \$5,000.00  |  |
|                     | Guziejewski       |                                |                |       | \$1,196.00  |  |

|                           |                           |                         |                |       |             |  |
|---------------------------|---------------------------|-------------------------|----------------|-------|-------------|--|
| Owner Occupied Rehab      | Candy Leak                | 22111 Laramore Ave.     | Port Charlotte | 33952 | \$47,704.65 |  |
|                           | Rodney Wolfe              |                         |                |       | \$2,530.00  |  |
|                           | Cynithia Adam             | 3088 Olney Street       | Port Charlotte | 33948 | \$26,000.00 |  |
|                           | Heather Bergeron          | 28154 Barstow Drive     | Punta Gorda    | 33955 | \$26,000.00 |  |
|                           | Keysha Bonner             | 3080 Olney Street       | Port Charlotte | 33948 | \$27,040.00 |  |
|                           | Natalie Cambareri         | 3479 Winona Street      | Port Charlotte | 33948 | \$26,000.00 |  |
|                           | Misty Ann Cassel          | 3072 Olney Street       | Port Charlotte | 33948 | \$32,760.00 |  |
|                           | Manuel Baez-Hall          | 21168 Chatburn Avenue   | Port Charlotte | 33952 | \$32,760.00 |  |
|                           | Brianna Fiocheta          | 56 Overbrook Street     | Port Charlotte | 33954 | \$26,000.00 |  |
|                           | Caleb Fisher              | 1557 Amstead Street     | Port Charlotte | 33980 | \$32,240.00 |  |
|                           | Richard Danielson         | 12061 Coleman Avenue    | Port Charlotte | 33981 | \$26,520.00 |  |
|                           | Cassie Davis              | 64 Overbrook Street     | Port Charlotte | 33954 | \$26,000.00 |  |
| Multi-Family Construction | Rebecca Hernandez         | 24420 Airport Rd. #133  | Punta Gorda    | 33950 | \$50,000.00 |  |
| Multi-Family Construction | Alexandra Zeno            | 24420 Airport Rd. #215  | Punta Gorda    | 33950 | \$50,000.00 |  |
| Multi-Family Construction | Matthew Keener            | 24420 Airport Rd. #315  | Punta Gorda    | 33950 | \$50,000.00 |  |
| Multi-Family Construction | Alexis Carnes             | 24420 Airport Rd. #317  | Punta Gorda    | 33950 | \$50,000.00 |  |
| Multi-Family Construction | Martha Napoles            | 24420 Airport Rd. #324  | Punta Gorda    | 33950 | \$50,000.00 |  |
| Multi-Family Construction | Kevin Powers              | 24420 Airport Rd. #416  | Punta Gorda    | 33950 | \$50,000.00 |  |
| Multi-Family Construction | Debbie Martinez           | 24420 Airport Rd. #427  | Punta Gorda    | 33950 | \$50,000.00 |  |
| Multi-Family Construction | Stephanie Robison         | 24420 Airport Rd. #428  | Punta Gorda    | 33950 | \$50,000.00 |  |
| Owner Occupied Rehab      | Vicky Patterson           | 464 Dewhurst Street     | Port Charlotte | 33954 | \$77,126.18 |  |
| Owner Occupied Rehab      | Mary Murphy               | 22310 Augusta Ave       | Port Charlotte | 33952 | \$18,612.30 |  |
| Owner Occupied Rehab      | Dennis & Virginia Merrill | 13536 Santa Rosa Ave.   | Port Charlotte | 33981 | \$19,671.75 |  |
| Owner Occupied Rehab      | Steven Simon              | 1124 E. Corktree Circle | Port Charlotte | 33952 | \$185.00    |  |
| Disaster Assistance       | Carrie Greus              | 8349 Roosevelt Street   | Englewood      | 34224 | \$2,300.00  |  |
| Owner Occupied Rehab      | Brenda Rhodes             | 22519 Alcorn Ave        | Port Charlotte | 33954 | \$47,678.40 |  |
| Disaster Assistance       | Sandra Gehron             | 220 Pompano Terrace     | Punta Gorda    | 33950 | \$12,000.00 |  |

|                     |                     |                               |                |       |             |  |
|---------------------|---------------------|-------------------------------|----------------|-------|-------------|--|
| Disaster Assistance | Cherylann Blanchard | 24540 Harborview Rd, A1       | Port Charlotte | 33980 | \$11,980.92 |  |
| Disaster Assistance | Craig Kenny         | 23472 Charleston Cir APT 324  | Punta Gorda    | 33980 | \$2,536.54  |  |
| Disaster Assistance | Melissa Franko      | 18000 Murdock Circle Unit 104 | Port Charlotte | 33948 | \$2,232.75  |  |
| Emergency Repair    | Shawn Pangburn      | 2168 Pellam Blvd              | Port Charlotte | 33948 | \$10,000.00 |  |
|                     | Kukowski            |                               |                |       | \$5,479.48  |  |
|                     | William Miller      | 13043 Chamberlain Blvd.       | Port Charlotte | 33953 | \$26,000.00 |  |
|                     | Adrienne Norton     | 30185 Alder Road              | Punta Gorda    | 33982 | \$26,520.00 |  |
|                     | Melissa Williams    | 47 Cory Street                | Port Charlotte | 33953 | \$32,240.00 |  |

### Administration by Entity

| Name | Business Type | Strategy Covered | Responsibility | Amount |
|------|---------------|------------------|----------------|--------|
|------|---------------|------------------|----------------|--------|

### Program Income

| Program Income Funds |                     |
|----------------------|---------------------|
| Loan Repayment:      | \$454,720.27        |
| Refinance:           |                     |
| Foreclosure:         |                     |
| Sale of Property:    |                     |
| Interest Earned:     | \$48,223.00         |
| <b>Total:</b>        | <b>\$502,943.27</b> |

### Number of Affordable Housing Applications

| Number of Affordable Housing Applications |     |
|---|-----|
| Submitted                                 | 145 |
| Approved                                  | 140 |
| Denied                                    | 5   |

### Explanation of Recaptured funds

| Description  | Amount        |
|--|---------------|
| Return of Non-profit Rental Rehab loan; units not rehabbed |               |
|  |               |
|  |               |
| <b>Total:</b>  | <b>\$0.00</b> |

### Rental Developments

| Development Name | Owner                 | Address     | City           | Zip Code | SHIP Amount  | SHIP Units | Compliance Monitored By |
|------------------|-----------------------|-------------|----------------|----------|--------------|------------|-------------------------|
| Harbor Place     | Goodwill Industries   | Helms Way   | Port Charlotte |          | \$203,432.00 | 8          |                         |
| Verandas III     | Punta Gorda Dev. Corp | Airport Rd. | Punta Gorda    |          | \$400,000.00 | 8          |                         |

### Single Family Area Purchase Price

The average area purchase price of single family units:

220,000.00

Or

Not Applicable

**Form 5**

## Special Needs Breakdown

| Code(s)       | Strategies                      | Expended Amount     | Units     | Encumbered Amount | Units | % of Allocation |
|---------------|---------------------------------|---------------------|-----------|-------------------|-------|-----------------|
| 2             | Purchase Assistance             | \$27,040.00         | 1         |                   |       |                 |
| 2             |                                 |                     |           |                   |       |                 |
| 3             | Owner Occupied Rehab            | \$66,290.70         | 2         |                   |       |                 |
| 5             | Disaster Assistance             | \$87,130.00         | 15        |                   |       |                 |
| 5             |                                 |                     |           |                   |       |                 |
| 14            | Non-profit/Special needs Rental | \$178,003.00        | 7         |                   |       |                 |
| 21            | Multi-Family Construction       | \$150,000.00        | 3         |                   |       |                 |
| <b>Total:</b> |                                 | <b>\$508,463.70</b> | <b>28</b> |                   |       | <b>5.34%</b>    |

## Special Needs Category Breakdown by Strategy

| Strategies                           | Special Needs Category                         | Expended Amount | Units | Encumbered Amount | Units |
|--------------------------------------|--|-----------------|-------|-------------------|-------|
| (14) Non-profit/Special needs Rental | Person with Disabling Condition (not DD)       | \$101,716.00    | 4     |                   |       |
| (14) Non-profit/Special needs Rental | Receiving Supplemental Security Income         | \$76,287.00     | 3     |                   |       |
| (2) Purchase Assistance              | Person with Disabling Condition (not DD)       | \$27,040.00     | 1     |                   |       |
| (5) Disaster Assistance              | Receiving Social Security Disability Insurance | \$76,940.00     | 13    |                   |       |
| (5) Disaster Assistance              | Receiving Veterans Disability Benefits         | \$10,190.00     | 2     |                   |       |
| (21) Multi-Family Construction       | Receiving Social Security Disability Insurance | \$150,000.00    | 3     |                   |       |
| (3) Owner Occupied Rehab             | Receiving Social Security Disability Insurance | \$66,290.70     | 2     |                   |       |

**Provide a description of efforts to reduce homelessness:**

## Interim Year Data

## Interim Year Data

| Revenue                              |                |
|--------------------------------------|----------------|
| State Annual Distribution            | \$2,308,201.00 |
| SHIP Disaster Funds                  |                |
| HHRP Allocation                      | \$121,000.00   |
| Program Income                       |                |
| <b>Total Revenue: \$2,429,201.00</b> |                |

| Expenditures/Encumbrances                               |                |
|---|----------------|
| Program Funds Expended                                  | \$134,168.95   |
| Program Funds Encumbered                                | \$9,877,483.91 |
| Total Administration Funds Expended                     |                |
| Total Administration Funds Encumbered                   |                |
| Homeownership Counseling                                |                |
| <b>Total Expenditures/Encumbrances: \$10,011,652.86</b> |                |

| Set-Asides                             |                | Percentage |
|--|----------------|------------|
| 65% Homeownership Requirement          | \$4,698,952.86 | 193.44%    |
| 75% Construction / Rehabilitation      | \$9,498,005.07 | 390.99%    |
| 30% Very Low Income Requirement        | \$4,296,553.06 | 176.87%    |
| 60% Very Low + Low Income Requirements | \$9,891,652.86 | 407.20%    |
| 20% Special Needs Requirement          | \$375,804.07   | 15.47%     |

**LG Submitted Comments:**

08.10.2025 - Report in progress; not all data entered; will finalize prior to submission. SHIP PY23 received waivers on rental/homeownership, construction set asides due to Hurricane Ian. HHR extended to 06.30.2026; encumbered funds reflected as Interim 1; not all data available at this time.

DRAFT