

SUMTER COUNTY CLOSEOUT REPORT

SHIP 07/08 FUNDS

ENDING JUNE 30, 2010

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
6	Emergency Repair	\$19,557.00	5				
3	Home Rehabilitation	\$271,776.23	11				
2	Home Purchase	\$466,219.11	20				
Homeownership Totals:		\$757,552.34	36				

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
23	Rent Deposits	\$6,948.00	14				
Rental Totals:		\$6,948.00	14				
Subtotals:		\$764,500.34	50				

Additional Use of Funds

Use	Expended	Encumbered	Unencumbered
Administrative	\$76,205.80		
Homeownership Counseling			
Admin From Program Income	\$4,107.59		
Admin From Disaster Funds			

Totals:	\$844,813.73	50	\$.00	\$.00
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Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$762,058.00
Program Income (Interest)	\$29,071.72
Program Income (Payments)	\$53,080.18
Recaptured Funds	
Disaster Funds	
Other Funds	
Carryover funds from previous year	\$1,302.95
Total:	\$845,512.85

* Carry Forward to Next Year: \$699.12

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

Rental Unit Information

Description	Eff.	1 Bed	2 Bed	3 Bed	4 Bed
Rent Deposits	\$.00	\$.00	\$550.00	\$725.00	\$950.00

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	\$764,500.34	23.12%
Public Moneys Expended	\$721,783.35	21.83%
Private Funds Expended	\$1,740,349.40	52.64%
Owner Contribution	\$79,343.53	2.40%
Total Value of All Units	\$3,305,976.62	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$757,552.34	\$762,058.00	99.41%	65%
Construction / Rehabilitation	\$589,048.87	\$762,058.00	77.30%	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	\$9,584.70			\$9,584.70	1.13%
Very Low	\$256,766.18			\$256,766.18	30.37%
Low	\$433,902.13			\$433,902.13	51.32%
Moderate	\$64,247.33			\$64,247.33	7.60%
Totals:	\$764,500.34	\$.00	\$.00	\$764,500.34	90.42%

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

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	\$9,584.70	10	\$.00	0	\$9,584.70	10
Very Low	\$250,186.18	13	\$6,580.00	2	\$256,766.18	15
Low	\$420,925.13	15	\$12,977.00	3	\$433,902.13	18
Moderate	\$64,247.33	7	\$.00	0	\$64,247.33	7
Totals:	\$744,943.34	45	\$19,557.00	5	\$764,500.34	50

Number of Households/Units Produced

Description	List Unincorporated and Each Municipality	ELI	VLI	Low	Mod	Total
Emergency Repair	Sumter		1	3		4
Emergency Repair	Wildwood		1			1
Home Rehabilitation	Center Hill			1		1
Home Rehabilitation	Sumter	1	5	3		9
Home Rehabilitation	Webster		1			1
Home Purchase	Bushnell			1	2	3
Home Purchase	Sumter		2	8	4	14
Home Purchase	Wildwood			2	1	3
Rent Deposits	Bushnell	5	2			7
Rent Deposits	Sumter	2				2
Rent Deposits	Wildwood	2	3			5
Totals:		10	15	18	7	50

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality	0 - 25	26 - 40	41 - 61	62+	Total
Emergency Repair	Sumter			2	2	4
Emergency Repair	Wildwood				1	1
Home Rehabilitation	Center Hill				1	1
Home Rehabilitation	Sumter			3	6	9
Home Rehabilitation	Webster				1	1
Home Purchase	Bushnell		1	1	1	3
Home Purchase	Sumter	2	6	4	2	14
Home Purchase	Wildwood		2	1		3
Rent Deposits	Bushnell	3	3	1		7
Rent Deposits	Sumter	1	1			2
Rent Deposits	Wildwood	1	1	3		5
Totals:		7	14	15	14	50

Family Size

Description	List Unincorporated and Each Municipality	1 Person	2-4 People	5+ People	Total
Emergency Repair	Sumter	2	2		4
Emergency Repair	Wildwood	1			1
Home Rehabilitation	Center Hill	1			1
Home Rehabilitation	Sumter	1	8		9
Home Rehabilitation	Webster	1			1
Home Purchase	Bushnell		3		3
Home Purchase	Sumter	4	9	1	14

Home Purchase	Wildwood	1	2		3
Rent Deposits	Bushnell		6	1	7
Rent Deposits	Sumter		1	1	2
Rent Deposits	Wildwood	1	4		5
Totals:		12	35	3	50

Race (Head of Household)

Description	List Unincorporated and Each Municipality	White	Black	Hispanic	Asian	Amer-Indian	Other	Total
Emergency Repair	Sumter	4						4
Emergency Repair	Wildwood		1					1
Home Rehabilitation	Center Hill	1						1
Home Rehabilitation	Sumter	3	6					9
Home Rehabilitation	Webster		1					1
Home Purchase	Bushnell	1	1	1				3
Home Purchase	Sumter	12	1	1				14
Home Purchase	Wildwood	3						3
Rent Deposits	Bushnell	1	4	2				7
Rent Deposits	Sumter		2					2
Rent Deposits	Wildwood		5					5
Totals:		25	21	4				50

Special Needs (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Devel. Dis-abled	Home-less	Elderly	Special Needs	Special Needs	Total
Emergency Repair	Sumter				1			1
Emergency Repair	Wildwood				1			1
Home Rehabilitation	Center Hill				1			1
Home Rehabilitation	Sumter				4	4		8
Home Rehabilitation	Webster				1			1
Home Purchase	Bushnell				1			1
Home Purchase	Sumter				2	1		3
Home Purchase	Wildwood		1					1
Rent Deposits	Bushnell				1			1
Rent Deposits	Sumter							0
Rent Deposits	Wildwood				2			2
Totals:			1		14	5		20

Status of Incentive Strategies

Incentive Strategy:

Expedited permitting
On-going review of policies, procedures and Comprehensive Plan Amendments

Adopting Ordinance or Resolution Number or identify local policy:

Sumter County Ordinance No. 93-1

Implementation Schedule (Date):

Expedited Permtting - Building Department provides a list of SHIP projects that are approved within 3 days or less if all information is provided by the contractor and the Health Department issues the septic permit. The AHAC meets quarterly to discuss current policies and procedures and what can be done to improve affordable housing opportunities. All recommendations will be made to the Board of County Commissioners for consideration.

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

Expedited Permitting - The plan is currently being implemented.
On-going Review - The plan is currently being implemented.

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

Expedited Permitting - All permits have been issued within the time frame unless the contractor doesn't provide all information or the Department of Health hasn't issued septic permits.
On-going Review - The AHAC continually reviews policies and procedures. The committee listens to presentations from the planning department and non-profits in the area to provide a partnership to increase affordable housing in Sumter County.

Support Services

The Housing Department provides homeownership and foreclosure prevention counseling. The Housing Department is a platinum member of the Department of Children and Families in order to assist Sumter County residents with applying for food stamps, medicaid and cash assistance online.

Other Accomplishments

Sumter County was awarded a CDBG grant to replace 10 homes. By matching with SHIP funds there were 12 replacement homes and 5 rehabilitations without going over budget

Availability for Public Inspection and Comments

The public is notified of the availability of annual reports and new LHAP's and where they are located for inspection through the Board of Commissioners meetings and advertisement on the county website. All reports and LHAPs are made available to the public Monday through Friday, 8:30am - 5:00pm at the Sumter County Housing Department, 910 North Main Street, Suite 301, Bushnell, FL 33513 for inspection and comments.

Default and Foreclosure

Mortgage Foreclosures

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

Mortgage Defaults

- A. Very low income households in default: 2
- B. Low income households in default: 3
- C. Moderate households in default: 2

Welfare to Work Programs

There are no eligible sponsors.

Strategies and Production Costs

Strategy	Average Cost
Emergency Repair	\$3,911.00
Home Rehabilitation	\$24,689.00
Home Purchase	\$22,311.00
Rent Deposits	\$496.00

Expended Funds

Total Unit Count: 0

Total Expended Amount: \$764,500.00

Strategy	Full Name	Address	City	Zip Code	Expended Funds	Unit Counted
Emergency Repair	Betty Vann	1737 W Hwy 48	Bushnell	33513	\$3,880.00	■
Emergency Repair	Kitty Warden	2879 CR 617	Bushnell	33513	\$5,987.00	■
Emergency Repair	Michael & Lisa Jarrett	5298 CR 634S	Bushnell	33513	\$3,570.00	■
Emergency Repair	Jacklin Golz	790 CR 474	Lake Panasoffkee	33538	\$3,420.00	■
Emergency Repair	Geneva Johnson	505 Mill Street	Wildwood	34785	\$2,700.00	■
Home Rehabilitation	Gary Luman	8308 CR 643	Bushnell	33513	\$17,864.98	■
Home Rehabilitation	Alean Baker	344 CR 552N	Bushnell	33513	\$15,765.51	■
Home Rehabilitation	Isaac Anderson	3958 SE 108th Lane	Webster	33597	\$12,365.24	■
Home Rehabilitation	Bia Dora Edwards	9260 CR 241	Wildwood	34785	\$5,111.70	■
Home Rehabilitation	Willean James	9090 CR 241	Wildwood	34785	\$35,575.45	■
Home Rehabilitation	Roy Kelly	2835 CR 426E	Lake Panasoffkee	33538	\$2,199.75	■
Home Rehabilitation	Bernice Robinson	7051CR 213	Wildwood	34785	\$16,818.15	■
Home Rehabilitation	Diana Rigsby	10760 CR 723	Webster	33597	\$790.65	■
Home Rehabilitation	Louise Anderson	103 N Magnolia Avenue	Center Hill	33514	\$63,047.85	■
Home Rehabilitation	Gertrude Hadley	772 NW 5th Street	Webster	33597	\$57,460.25	■
Home Rehabilitation	Rex & Mary Fountain	11283 CR 683	Webster	33597	\$44,776.70	■
Home Purchase	Richard & Vivian Budden	419 Southland Avenue	Bushnell	33513	\$7,721.30	■
Home Purchase	Frank & Georgia Wilkerson	802 Osceola Avenue	Wildwood	34785	\$10,000.00	■

Home Purchase	Karen Baker	1284 CR 463	Lake Panasoffkee	33538	\$38,515.64	■
Home Purchase	Darrell Andrews	2826 CR 526	Sumterville	33585	\$10,000.00	■
Home Purchase	Laura Richardson	973 CR 455	Lake Panasoffkee	33538	\$30,000.00	■
Home Purchase	Gerardo & Donna Quiroz-Naranjo	307 W. Parkhill Avenue	Bushnell	33513	\$30,000.00	■
Home Purchase	Mandalyn Robitzer	2614 SE 75th Boulevard	Bushnell	33513	\$10,000.00	■
Home Purchase	David & Nereida Gainey	409 S. Justice Street	Bushnell	33513	\$8,426.03	■
Home Purchase	Robertta Douglas	1934 E CR 462	Wildwood	34785	\$30,000.00	■
Home Purchase	Edgard Rivera	2918 CR 756A	Webster	33597	\$8,100.00	■
Home Purchase	Sara Lassiter	509 Barwick Street	Wildwood	34785	\$29,200.00	■
Home Purchase	Sandra Wells	2884 SE 75th Boulevard	Bushnell	33513	\$30,000.00	■
Home Purchase	Derek Burdine	12393 NE 50th View	Oxford	34484	\$30,000.00	■
Home Purchase	Reba Coe	171 CR 491 W	Lake Panasoffkee	33538	\$24,636.00	■
Home Purchase	Crystal Knight	3261 CR 521	Coleman	33521	\$10,000.00	■
Home Purchase	David Young	1351 CR 437	Lake Panasoffkee	33538	\$29,620.14	■
Home Purchase	Jana Matson	5052 NE 121st Avenue	Oxford	34484	\$30,000.00	■
Home Purchase	Timothy Fox	7692 CR 575	Bushnell	33513	\$30,000.00	■
Home Purchase	Angela Grant	2796 SE 75th Boulevard	Bushnell	33513	\$30,000.00	■
Home Purchase	Vonice Edwards	1281 CR 443	Lake Panasoffkee	33538	\$40,000.00	■
Rent Deposits	Moses Hughes	406 Peters Street	Wildwood	34785	\$500.00	■
Rent Deposits	Judy Vasquez	1000 Meadows Circle, Apt. 30	Bushnell	33513	\$493.00	■
Rent Deposits	Ebony Elder	110 N Jasper Street, Unit 2	Bushnell	33513	\$500.00	■
Rent Deposits	Bridgett Woods	106 N Jasper Street, Unit 1	Bushnell	33513	\$500.00	■
Rent Deposits	JoAnne Stephens	719 Hence Street	Wildwood	34785	\$500.00	■
Rent Deposits	Valerie Strong	205 Mill Street	Wildwood	34785	\$500.00	■
Rent Deposits	Crystal Hunt	404 Peters Street	Wildwood	34785	\$475.00	■
Rent Deposits	Lela Hunt	10431 SW 60th Terrace	Bushnell	33513	\$500.00	■
Rent Deposits	Carolyn Mobley	775 Huey Street, Apt. B-2	Wildwood	34785	\$500.00	■
Rent Deposits	Tameya Purvis	301 E Gulf Atlantic Hwy, Apt 15	Wildwood	34785	\$480.00	■

Rent Deposits	Manual & Carol Diaz	323 W Parker Avenue	Bushnell	33513	\$500.00	■
Rent Deposits	Kathy Prevatt	64 SE 2nd Street	Webster	33597	\$500.00	■
Rent Deposits	Tora James	215 Rosewood Street, Apt A	Bushnell	33513	\$500.00	■
Rent Deposits	Brigitte Mitchell	200 Jumper Drive S, Apt A-1	Bushnell	33513	\$500.00	■

Administrative Expenditures

Salaries, Wages & Benefits	\$ 68,756.27
Contractual Services	3,182.20
Travel	522.75
Communications	732.52
Postage	260.70
Rentals & Leases	1,978.39
Repair & Maintenance	930.40
Printing & Binding	221.06
Legal Advertising	309.18
Recording Fees	10.00
Office Supplies	2,160.04
Operating Supplies	566.72
Gas & Oil	93.82
Books, Subscriptions & Dues	589.35
Total	\$80,313.40

Sub Recipients and Consultants

Name	Business Type	Strategy Covered	Responsibility
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Program Income

Program Income Funds	
Loan Repayment:	\$53,080.19
Refinance:	\$.00
Foreclosure:	\$.00
Sale of Property:	\$.00
Interest Earned:	\$29,071.71
Other ():	\$.00
Total:	\$82,151.90

Explanation of Recaptured funds

Description	Amount
Total:	\$.00

Sumter County 2007 Closeout