

Title: SHIP Annual Report

Report Status: Submitted

Ocala FY 2021/2022 Closeout

Form 1

SHIP Distribution Summary

Homeownership

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
3	Owner Occupied Rehab	\$403,147.39	8				
Homeownership Totals:		\$403,147.39	8				

Rentals

Code	Strategy	Expended Amount	Units	Encumbered Amount	Units	Unencumbered Amount	Units
13	Rental Assistance	\$2,823.00	1				
Rental Totals:		\$2,823.00	1				
Subtotals:		\$405,970.39	9				

Additional Use of Funds

Use	Expended
Administrative	\$21,546.76
Homeownership Counseling	\$.00
Admin From Program Income	\$.00
Admin From Disaster Funds	\$.00

Totals:	\$427,517.15	9	\$.00	\$.00
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Total Revenue (Actual and/or Anticipated) for Local SHIP Trust Fund

Source of Funds	Amount
State Annual Distribution	\$425,267.00
Program Income (Interest)	\$5,951.46
Program Income (Payments)	\$.00
Recaptured Funds	\$.00
Disaster Funds	
Other Funds	
Carryover funds from previous year	\$.00
Total:	\$431,218.46

*** Carry Forward to Next Year: \$3,701.31**

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	339	398	575	752	902
VLI	545	583	700	808	902
LOW	871	933	1,120	1,293	1,443
MOD	1,308	1,401	1,680	1,941	2,166
Up to 140%	1,526	1,634	1,960	2,264	2,527

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	\$405,970.39	100.00%
Public Moneys Expended	\$0.00	.00%
Private Funds Expended	\$0.00	.00%
Owner Contribution	\$0.00	.00%
Total Value of All Units	\$405,970.39	100.00%

SHIP Program Compliance Summary - Home Ownership/Construction/Rehab

Compliance Category	SHIP Funds	Trust Funds	% of Trust Fund	FL Statute Minimum %
Homeownership	\$403,147.39	\$425,267.00	94.80%	65%
Construction / Rehabilitation	\$403,147.39	\$425,267.00	94.80%	75%

Program Compliance - Income Set-Asides

Income Category	SHIP Funds	Total Available Funds % *
Extremely Low	\$99,518.88	23.08%
Very Low	\$129,525.00	30.04%
Low	\$105,715.61	24.52%
Moderate	\$71,210.90	16.51%
Over 120%-140%	\$0.00	.00%
Totals:	\$405,970.39	94.14%

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	\$99,518.88	4		0	\$99,518.88	4
Very Low	\$129,525.00	2		0	\$129,525.00	2
Low	\$102,892.61	1	\$2,823.00	1	\$105,715.61	2
Moderate	\$71,210.90	1		0	\$71,210.90	1
Over 120%-140%		0		0	\$.00	0
Totals:	\$403,147.39	8	\$2,823.00	1	\$405,970.39	9

Form 3

Number of Households/Units Produced

Strategy	List Unincorporated and Each Municipality	ELI	VLI	Low	Mod	Over 140%	Total
Owner Occupied Rehab	Ocala	4	2	1	1		8
Rental Assistance	Ocala			1			1
Totals:		4	2	2	1		9

Characteristics/Age (Head of Household)

Description	List Unincorporated and Each Municipality	0 - 25	26 - 40	41 - 61	62+	Total
Owner Occupied Rehab	Ocala		1	4	3	8
Rental Assistance	Ocala		1			1
Totals:			2	4	3	9

Family Size

Description	List Unincorporated and Each Municipality	1 Person	2- 4 People	5 + People	Total
Owner Occupied Rehab	Ocala	4	3	1	8
Rental Assistance	Ocala	1			1
Totals:		5	3	1	9

Race (Head of Household)

Description	List Unincorporated and Each Municipality	White	Black	Hispanic	Asian	Amer-Indian	Other	Total
Owner Occupied Rehab	Ocala	1	6	1				8
Rental Assistance	Ocala		1					1
Totals:		1	7	1				9

Demographics (Any Member of Household)

Description	List Unincorporated and Each Municipality	Farm Worker	Home-less	Elderly	Total
Owner Occupied Rehab	Ocala				0
Rental Assistance	Ocala				0
Totals:					0

Special Target Groups for Funds Expended (i.e. teachers, nurses, law enforcement, fire fighters, etc.) Set Aside

Description	Special Target Group	Expended Funds	Total # of Expended Units
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Form 4

Status of Incentive Strategies

Incentive	Description (If Other)	Category	Status	Year Adopted (or N/A)
Expedited permitting		Required	Adopted	1992
Ongoing review process		Required	Adopted	1992

Support Services

Support services are available from various sources. Services include but are not limited to first time homebuyer counseling, foreclosure prevention counseling, financial coaching, financial management education, and extended financial management education. The City partners with the Ocala Housing Authority and Neighborhood Housing Development Corporation to provide its neighbors with these services.

Other Accomplishments

The City has partnered with the Ocala Housing Authority in administering 51 Emergency Housing Vouchers. The partnership has led to 51 chronically homeless households being housed for nine (9) years with these vouchers.

Availability for Public Inspection and Comments

The SHIP annual report was made available on the department website at www.ocalaf.l.gov/government/community-development-services and was also made available at a public meeting with various organizations that particularly represent low to moderate-income households.

Life-to-Date Homeownership Default and Foreclosure

Total SHIP Purchase Assistance Loans: **0**

Mortgage Foreclosures

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

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: **0**
 B. Low income households in default: **0**
 C. Moderate households in default: **0**
 Defaulted Loans Life-to-date: **0**
 SHIP Program Default Percentage Rate Life to Date: **0.00**

Strategies and Production Costs

Strategy	Average Cost
Owner Occupied Rehab	\$44,794.15
Rental Assistance	\$2,823.00

Expended Funds

Total Unit Count: **9** Total Expended Amount: **\$405,970.39**

Strategy	Full Name	Address	City	Zip Code	Expended Funds	FY if Unit Already Counted
Owner Occupied Rehab	Reginald Taylor	455 Sw 2nd St	Ocala	34471	\$71,210.90	
Owner Occupied Rehab	Monique English	1500 NW 19th Ct	Ocala	34475	\$102,892.61	
Owner Occupied Rehab	Manuel Rodriguez	844 NE 44th Ave	Ocala	34470	\$117,145.00	
Owner Occupied Rehab	Leann Belyew	3806 NE 17th St Cir	Ocala	34470	\$85,745.00	
Owner Occupied Rehab	Trecolia Weems	2127 NW 2nd St	Ocala	34475	\$2,155.88	2019-2020
Owner Occupied Rehab	Cynthia Thomas	1635 Nw 24th St	Ocala	34475	\$990.00	
Owner Occupied Rehab	Caple Brenda	1508 NW 20th Ct	Ocala	34475	\$225.00	
Owner Occupied Rehab	Linda Shultz	1340 NE 31st Place	Ocala	34479	\$10,403.00	
Owner Occupied Rehab	Nancy Green	2720 SW 17th Circle	Ocala	34474	\$12,380.00	
Rental Assistance	Samar Hall	2281 NE 2nd St	Ocala	34470	\$2,823.00	

Administration by Entity

Name	Business Type	Strategy Covered	Responsibility	Amount
City of Ocala	Local Government	Administration	Administer the City of Ocala's Housing Plan	\$21,546.76

Program Income

Program Income Funds	
Loan Repayment:	\$.00
Refinance:	\$.00
Foreclosure:	\$.00
Sale of Property:	\$.00
Interest Earned:	\$5,951.46
Total:	\$5,951.46

Number of Affordable Housing Applications

Number of Affordable Housing Applications	
Submitted	19
Approved	15
Denied	4

Explanation of Recaptured funds

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

Rental Developments

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

Single Family Area Purchase Price

The average area purchase price of single family units:

Or

√ Not Applicable

Special Needs Breakdown

SHIP Expended and Encumbered for Special Needs Applicants

Code(s)	Strategies	Expended Amount	Units	Encumbered Amount	Units
3	Owner Occupied Rehab	\$85,745.00	1		

Special Needs Category Breakdown by Strategy

Strategies	Special Needs Category	Expended Amount	Units	Encumbered Amount	Units
(3) Owner Occupied Rehab	Developmental Disabilities	\$85,745.00	1		

Provide a description of efforts to reduce homelessness:

The City has created an Office of Homeless Prevention which is led by the Deputy Director of Community Development Services. She currently is a member of the Continuum of Care, conducts the annual PIT count, administers additional periodic counts, coordinates the Outreach program, manages the Coordinated Entry Program, and serves on the board of the local Salvation Army.

Ocala/Marion County's CoC has established a strategy for addressing the needs of homeless individuals and families making Permanent Supportive Housing and low barrier shelter priorities for Marion County. The vision is to develop a collaborative community-wide effort to implement a system that addresses homelessness in Marion County, with every individual and family being self-sufficient and having safe, decent, affordable, permanent housing. The vision includes:

- Management of street outreach teams made up of formerly homeless persons and professionals, to identify and gain the confidence of unsheltered homeless individuals with serious mental illness and/or substance abuse problems.
- Working to form partnerships in the community to create comprehensive case management for the chronically homeless, using the Housing First model. This includes working towards adding a "low barrier" type shelter and an "engagement (day) center" to work with unsheltered clients that have barriers that prevent them from entering our existing shelters. Regular case management has shown better success rates in homeless clients obtaining and maintaining permanent housing.
- Development of additional mental health and substance abuse treatment resources targeting the homeless based on best practices. Additional services have become available in our area to assist homeless clients with these services (non-emergency) for either no or low cost.
- Development of comprehensive employment and job training, and supportive services for the chronically homeless throughout the County. Staff has a close relationship with CareerSource Citrus Levy Marion, the community's local workforce board and Wear Gloves, an organization which offers entry level employment to those with employment barriers.
- Development of transitional and permanent housing in concert with those local agencies and organizations that have the capacity to develop housing programs and perform case management. At least one project will break ground in August/September of 2024 that will provide very low-income housing and permanent supportive housing to clients with housing barriers.
- City staff will administer an assessment tool to triage clients that meet the literally homeless criteria. This tool assesses the client's vulnerability and assigns them a score based on their responses. The score reflects the level of their vulnerability and that score, along with the length of time they have been homeless, form their Coordinated Entry placement score. They will then be placed on the Coordinated Entry list to obtain housing financial assistance.
- Aggressive member enrollment, training and monitoring of the Homeless Management Information System. The HMIS System in place is HUD Compliant and provides adequate security features to ensure client confidentiality. City staff will continue to encourage more agencies to utilize the system, as well as existing users to expand their use of the system to its full capabilities. Ongoing data quality improvement is a priority as well.
- Enhancement of current programs which provide financial assistance and counseling to people at risk of homelessness.

Marion service providers and local governmental agencies support and encourage the ongoing efforts of the CoC and have used the CoC as a basis for its strategies to address homeless needs planning.

Interim Year Data

Interim Year Data

Interim Year 1		
State Annual Distribution	\$616,629.00	
Program Income	\$23,651.16	
Program Funds Expended	\$537,262.90	
Program Funds Encumbered	\$103,000.00	
Total Administration Funds Expended	\$32,813.67	
Total Administration Funds Encumbered		
Homeownership Counseling		
Disaster Funds		
65% Homeownership Requirement	\$558,565.12	90.58%
75% Construction / Rehabilitation	\$549,727.77	89.15%
30% Very & Extremely Low Income Requirement	\$197,678.31	30.87%
30% Low Income Requirement	\$302,750.36	47.28%
20% Special Needs Requirement	\$153,089.68	24.83%
Carry Forward to Next Year		

LG Submitted Comments: