

**Grantee: Polk County, FL**

**Grant: B-08-UN-12-0016**

**October 1, 2016 thru September 30, 2017 Performance**

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**Grant Number:**  
B-08-UN-12-0016

**Obligation Date:**

**Award Date:**

**Grantee Name:**  
Polk County, FL

**Contract End Date:**

**Review by HUD:**  
Reviewed and Approved

**Grant Award Amount:**  
\$14,586,258.00

**Grant Status:**  
Closed with PI Active

**QPR Contact:**  
Nancy Hurley

**LOCCS Authorized Amount:**  
\$14,586,258.00

**Estimated PI/RL Funds:**  
\$7,738,865.56

**Total Budget:**  
\$22,325,123.56

## Disasters:

### Declaration Number

NSP

## Narratives

### Areas of Greatest Need:

The target areas for the Neighborhood Stabilization Program in Polk County were developed pursuant to the three criteria set forth by the Housing and Economic Recovery Act (HERA) of 2008. The three criteria are:

- Greatest percentage of home foreclosures;
- Highest percentage of homes financed by a subprime mortgage related loan; and
- Areas identified as the most likely to face a significant rise in the rate of home foreclosures.

Based on these three criteria, Polk County identified the areas of: Auburndale, Combee, Eaton Park, Inwood, Jan Phyl Village, Kathleen, Poinciana, South Lake Wales, Wabash, and Wahneta.

The areas in order of greatest need are Inwood, Wabash, South Lake Wales, Eaton Park, Jan Phyl Village, Poinciana, Wahneta, and Combee.

Initially, the selected target areas were identified as high risk using the foreclosure abandonment risk score system. Areas with foreclosure abandonment risk scores of 8, 9, and 10 were selected. However, after reviewing the data, it has been determined that not all eligible geographic areas with risk scores of 8, 9, and 10 were included in the original NSP1 submittal. In the Substantial Amendment #2 to the 2008-2009 Action Plan Polk County expanded the NSP1 program to include all eligible areas/census tracts with abandonment risk scores of 8, 9 and 10. Polk County also expanded the NSP1 program service area to include tracts that have an abandonment risk score of 5, 6, and 7.

### Distribution and and Uses of Funds:

Using NSP funds Polk County proposed to purchase, rehabilitate and resell approximately eighty-six (86) single-family units. Ten (10) units will be targeted to residents 50% and below of the area median income. The other seventy-six (76) units will be sold to residents 51-120% of the area median income.

To further address the needs of the residents that fall into the 50% and below of the area median income levels, Polk County proposes to purchase, rehabilitate and resell approximately twenty-five (25) rental units.

Polk County proposes to demolish and redevelop approximately seventeen (17) units.

### Definitions and Descriptions:

### Low Income Targeting:

### Acquisition and Relocation:



**Public Comment:**

<b>Overall</b>	<b>This Report Period</b>	<b>To Date</b>
<b>Total Projected Budget from All Sources</b>	N/A	\$21,290,113.66
<b>Total Budget</b>	\$47,142.00	\$21,290,113.66
<b>Total Obligated</b>	\$47,142.00	\$21,290,113.66
<b>Total Funds Drawdown</b>	\$39.86	\$21,207,859.26
<b>Program Funds Drawdown</b>	\$0.00	\$14,586,258.00
<b>Program Income Drawdown</b>	\$39.86	\$6,621,601.26
<b>Program Income Received</b>	\$52,380.00	\$7,816,845.56
<b>Total Funds Expended</b>	\$39.86	\$21,207,859.26
<b>Most Impacted and Distressed Expended</b>	\$0.00	\$0.00
<b>Match Contributed</b>	\$0.00	\$0.00

## Progress Toward Required Numeric Targets

<b>Requirement</b>	<b>Target</b>	<b>Actual</b>
<b>Overall Benefit Percentage (Projected)</b>		0.00%
<b>Overall Benefit Percentage (Actual)</b>		0.00%
<b>Minimum Non-Federal Match</b>	\$0.00	\$0.00
<b>Limit on Public Services</b>	\$2,187,938.70	\$0.00
<b>Limit on Admin/Planning</b>	\$1,458,625.80	\$2,197,399.15
<b>Limit on State Admin</b>	\$0.00	\$2,197,399.15
<b>Most Impacted and Distressed Threshold (Projected)</b>	\$0.00	\$0.00

## Overall Progress Narrative:

Polk County completed its final NSP1 QPR for close out January 9, 2017. This Performance Report reflects a one year update and overview of NSP1 activities that took place over the last twelve months. During the year after NSP1 close out two (2) single family home were sold and the assistance recaptured. The Program Income was receipted into a newly opened activity. It is anticipated that In the next three months Polk County Housing and Neighborhood Development will submit an official request to transfer \$650,000 in NSP1 program income into the 2017-2018 Action Plan Lake Gwyn Phase 2 park project.

## Project Summary

<b>Project #, Project Title</b>	<b>This Report Period</b>	<b>To Date</b>	
	<b>Program Funds Drawdown</b>	<b>Project Funds Budgeted</b>	<b>Program Funds Drawdown</b>
Acq/Rehab/Resale- Rental#2,	\$0.00	\$3,934,641.15	\$2,839,729.01
Acq/Rehab/Resale-Ownership #1, Acquisition/Rehab/Resale	\$0.00	\$14,264,537.58	\$9,987,059.89
Administration, Administration	\$0.00	\$2,232,511.55	\$1,458,625.00
Demo/Redev #3, Demolition/Redevelopment	\$0.00	\$863,661.38	\$300,844.10



## Activities

**Project # / Title:** Acq/Rehab/Resale- Rental#2 /

**Grantee Activity Number:** MF Rental Rehab LMMI

**Activity Title:** MF Rental Rehab LMMI

**Activity Category:**

Rehabilitation/reconstruction of residential structures

**Project Number:**

Acq/Rehab/Resale- Rental#2

**Projected Start Date:**

06/16/2009

**Benefit Type:**

Direct ( HouseHold )

**National Objective:**

NSP Only - LMMI

**Activity Status:**

Completed

**Project Title:**

Acquisition/Rehabilitation/Resale Rental Units

**Projected End Date:**

04/02/2010

**Completed Activity Actual End Date:**

**Responsible Organization:**

Keystone Challenge Fund, Inc.1

**Overall**

	<b>Oct 1 thru Sep 30, 2017</b>	<b>To Date</b>
<b>Total Projected Budget from All Sources</b>	N/A	\$280,010.81
<b>Total Budget</b>	\$0.00	\$280,010.81
<b>Total Obligated</b>	\$0.00	\$280,010.81
<b>Total Funds Drawdown</b>	\$0.00	\$280,010.81
<b>Program Funds Drawdown</b>	\$0.00	\$280,010.81
<b>Program Income Drawdown</b>	\$0.00	\$0.00
<b>Program Income Received</b>	\$0.00	\$0.00
<b>Total Funds Expended</b>	\$0.00	\$280,010.81
Keystone Challenge Fund, Inc.1	\$0.00	\$280,010.81
<b>Most Impacted and Distressed Expended</b>	\$0.00	\$0.00
<b>Match Contributed</b>	\$0.00	\$0.00

**Activity Description:**

LMMI costs for rental properties for acquisition, rehab and disposition for the following properties: Heritage Place apartments (3 units), 518 Albatross Dr., duplex, and 2727 Fletcher Ave., duplex, and 2735 Fletcher Ave., duplex and one single family rental unit located at 1343 Fairway Drive.

Activity MF/SF/Rental Rehab LMMI #2 is a duplicate of this activity administratively retained to hold some costs which were billed under a previous Action Plan structure. All performance measures for this pair of activities will be reported under THIS activity.

**Location Description:**

This activity covers the costs on the 3 LMMI units of the North Van Fleet MF property, as well as the two Duplexes on Fletcher and the Duplex on Albatross. It also covers the SF Rental on Fairway.

**Activity Progress Narrative:**



## Accomplishments Performance Measures

	This Report Period		Cumulative Actual Total / Expected	
	Total		Total	
# of Properties	0		1/5	
#Units exceeding Energy Star	0		1/3	
#Sites re-used	0		0/5	
#Units deconstructed	0		0/10	

	This Report Period		Cumulative Actual Total / Expected	
	Total		Total	
# of Housing Units	0		1/10	
# of Multifamily Units	0		1/3	
# of Singlefamily Units	0		0/7	

## Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod
# of Households	0	0	0	0/0	1/5	1/10	100.00
# Renter Households	0	0	0	0/0	1/5	1/10	100.00

## Activity Locations

No Activity Locations found.

## Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	

**Project # / Title: Acq/Rehab/Resale-Ownership #1 / Acquisition/Rehab/Resale**

**Grantee Activity Number: 2017 NSP1 Post Close Acq/Rehab/Owner LMMI**

**Activity Title: 2017 NSP1 Post Close Acq/Rehab/Owner LMMI**

**Activity Category:**  
Rehabilitation/reconstruction of residential structures

**Activity Status:**  
Planned

**Project Number:**

**Project Title:**



Acq/Rehab/Resale-Ownership #1

**Projected Start Date:**

09/20/2017

**Benefit Type:**

Direct ( HouseHold )

**National Objective:**

NSP Only - LMMI

Acquisition/Rehab/Resale Ownership #1

**Projected End Date:**

10/31/2017

**Completed Activity Actual End Date:**

**Responsible Organization:**

Polk County Housing and Neighborhood Dev.

**Overall**

**Total Projected Budget from All Sources**

**Oct 1 thru Sep 30, 2017**

N/A

**To Date**

\$47,142.00

**Total Budget**

\$47,142.00

\$47,142.00

**Total Obligated**

\$47,142.00

\$47,142.00

**Total Funds Drawdown**

\$0.00

\$0.00

**Program Funds Drawdown**

\$0.00

\$0.00

**Program Income Drawdown**

\$0.00

\$0.00

**Program Income Received**

\$47,142.00

\$47,142.00

**Total Funds Expended**

\$0.00

\$0.00

Polk County Housing and Neighborhood Dev.

\$0.00

\$0.00

**Most Impacted and Distressed Expended**

\$0.00

\$0.00

**Match Contributed**

\$0.00

\$0.00

**Activity Description:**

This NSP1 Activity was created post close out to receipt program income from NSP1 units resold and reflect receipting of the recaptured funds.

**Location Description:**

**Activity Progress Narrative:**

This activity was opened after close out to receipt recaptured NSP1 assistance from the resale of the original single family NSP1 units.

**Accomplishments Performance Measures**

No Accomplishments Performance Measures

**Beneficiaries Performance Measures**

No Beneficiaries Performance Measures found.

**Activity Locations**

No Activity Locations found.



## Other Funding Sources Budgeted - Detail

### No Other Match Funding Sources Found

#### Other Funding Sources

Amount

No Other Funding Sources Found

Total Other Funding Sources

### Project # / Title: Administration / Administration

**Grantee Activity Number:** Administration-01

**Activity Title:** Adminstration

**Activity Category:**

Administration

**Activity Status:**

Under Way

**Project Number:**

Administration

**Project Title:**

Administration

**Projected Start Date:**

09/26/2017

**Projected End Date:**

08/31/2018

**Benefit Type:**

( )

**Completed Activity Actual End Date:**

**National Objective:**

N/A

**Responsible Organization:**

Polk County Housing & Neighborhood Development

Overall	Oct 1 thru Sep 30, 2017	To Date
<b>Total Projected Budget from All Sources</b>	N/A	\$2,232,511.55
<b>Total Budget</b>	\$0.00	\$2,232,511.55
<b>Total Obligated</b>	\$0.00	\$2,232,511.55
<b>Total Funds Drawdown</b>	\$39.86	\$2,197,399.15
<b>Program Funds Drawdown</b>	\$0.00	\$1,458,625.00
<b>Program Income Drawdown</b>	\$39.86	\$738,774.15
<b>Program Income Received</b>	\$5,238.00	\$781,684.55
<b>Total Funds Expended</b>	\$39.86	\$2,197,399.15
Polk County Housing & Neighborhood Development	\$39.86	\$2,197,399.15
<b>Most Impacted and Distressed Expended</b>	\$0.00	\$0.00
<b>Match Contributed</b>	\$0.00	\$0.00

#### Activity Description:

The NSP funds will be used to provide administrative activities including but not limited to personnel to carry out contract management functions such monitoring, reporting, and direct and indirect charges. Polk County will also charge any pre-award costs incurred as part of the preparation of the substantial amendment to the Planning and Administration portion of the grant.



**Location Description:**

P.O. Box 2097 Lakeland, Florida 33806-2097

**Activity Progress Narrative:**

NSP1 administration funds were used to complete satisfactions of the two units that were resold during the last twelve months.

**Accomplishments Performance Measures**

**No Accomplishments Performance Measures**

**Beneficiaries Performance Measures**

**No Beneficiaries Performance Measures found.**

**Activity Locations**

**No Activity Locations found.**

**Other Funding Sources Budgeted - Detail**

**No Other Match Funding Sources Found**

**Other Funding Sources**

**Amount**

No Other Funding Sources Found

Total Other Funding Sources

