

CDBG-DR QPR

Quarterly Performance Report - B-23-UN-12-0002

COMMUNITY DEVELOPMENT BLOCK GRANT DISASTER RECOVERY FUNDS

Report Due Date: October 30, 2025



Lee County Affordable Housing Projects Progress

Top left: St Peter Claver Housing Phase II; Top right: Bayshore Pines; Bottom left: Hermosa II; Bottom right: McNiell Village 2

Lee Board of County Commissioners
2120 Main Street
Fort Myers, Florida
www.cdbqdr.leegov.com



Grantee: Lee County, FL

Grant: B-23-UN-12-0002

July 1, 2025 thru September 30, 2025 Performance Report

Grant Number:
B-23-UN-12-0002

Obligation Date:

Award Date:

Grantee Name:
Lee County, FL

Contract End Date:
11/20/2029

Review by HUD:
Original - In Progress

Grant Award Amount:
\$1,107,881,000.00

Grant Status:
Active

QPR Contact:
Chris Davis

LOCCS Authorized Amount:
\$1,107,881,000.00

Estimated PI/RL Funds:
\$0.00

Total Budget:
\$1,107,881,000.00

Disasters:
Declaration Number
FEMA-4673-FL

Overall	This Report Period	To Date
Total Projected Budget from All Sources	\$48,560,825.00	\$714,278,125.33
Total Budget	\$48,560,825.00	\$714,278,125.33
Total Obligated	\$55,310,825.00	\$624,316,424.33
Total Funds Drawdown	\$33,871,643.67	\$82,331,606.76
Program Funds Drawdown	\$33,871,643.67	\$82,331,606.76
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$33,871,643.67	\$82,525,017.32
HUD Identified Most Impacted and Distressed	\$33,871,643.67	\$82,525,017.32
Other Funds		
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00

Funds Expended Overall	This Period	To Date
Lee County, FL	\$ 23,947,723.88	\$ 69,077,857.21
2010 Hanson LLC	\$ 2,111,356.30	\$ 2,111,356.30
EBS Senior Living, LLC	\$ 0.00	\$ 0.00
Habitat for Humanity of Lee and Hendry Counties, Inc.	\$ 0.00	\$ 0.00
Hermosa NFTM 41 II, Ltd.	\$ 0.00	\$ 264,578.16
Housing Authority City of Ft. Myers	\$ 0.00	\$ 0.00
Lee County School Board	\$ 44,498.60	\$ 44,498.60
Matlacha Pine Island Fire Control District	\$ 0.00	\$ 0.00

Funds Expended Overall	This Period	To Date
MHP Lee I, LLC	\$ 4,496,682.42	\$ 4,496,682.42
OHG FL Lee I Bayshore LP	\$ 2,225,621.92	\$ 4,555,621.92
Southwest Florida Affordable Housing Choice	\$ 0.00	\$ 0.00
City of Bonita Springs	\$ 781.40	\$ 781.40
City of Bonita Springs City Hall	\$ 394.08	\$ 394.08
St Peter Claver Housing Inc	\$ 946,652.49	\$ 946,652.49
Town of Fort Myers Beach	\$ 0.00	\$ 0.00
Village of Estero	\$ 6,500.00	\$ 6,500.00
Catholic Charities, Diocese of Venice, Inc.	\$ 69,912.44	\$ 756,475.63
City of Cape Coral	\$ 0.00	\$ 0.00
City of Fort Myers	\$ 1,431.74	\$ 50,120.15
City of Sanibel	\$ 20,088.40	\$ 20,088.40
CORE OAK PARK LLLP	\$ 0.00	\$ 0.00
Dunbar Improvement Association Inc.	\$ 0.00	\$ 0.00

Progress Toward Required Numeric Targets

Requirement	Target	Projected	Actual
Overall Benefit Percentage	70.00%	75.22%	6.93%
Overall Benefit Amount	\$723,872,197.30	\$481,808,790.75	\$71,633,460.14
Limit on Public Services	\$166,182,150.00	\$3,833,333.33	\$1,030,002.20
Limit on Admin/Planning	\$221,576,200.00	\$73,777,861.00	\$8,929,244.80
Limit on Admin	\$55,394,050.00	\$55,394,050.00	\$4,869,259.07
Most Impacted and Distressed	\$1,107,881,000.00	\$638,884,075.33	\$82,525,017.32

Overall Progress Narrative:

This Quarterly Performance Report (QPR) due October 30, 2025, will summarize the progress of the Lee County Florida CDBG-DR Program for the period of July 1 – September 30, 2025.

This quarter's efforts toward the implementation of Hurricane Ian recovery programs have resulted in the following:

- Additional infrastructure projects awarded by the Lee County Board
- Execution of additional agreements
- Continued compliance and monitoring of subrecipients
- Additional training for subrecipients and staff on the system of record
- Development and implementation of activity closeout materials and process

CDBG-DR project milestones during the reporting period:

LeeCares Individual Housing Program

Home Purchase Assistance Program (HPA): During this reporting period, the Lee County Home Purchase Assistance (HPA) Program successfully closed on five (5) homes, helping income-eligible households achieve homeownership and secure stable, long-term housing. The properties purchased are located in Fort Myers, Cape Coral, and Lehigh Acres.

To date, the program has assisted 98 new homeowners with the purchase of their homes through financial support for down payment and closing costs. This assistance has played a vital role in reducing barriers to homeownership and promoting long-term housing stability for low- to moderate-income families across Lee County.

Housing Rehabilitation, Reconstruction, and Elevation Program (HRRE): The Housing Rehabilitation,

Reconstruction, and/or Elevation Program has completed the construction of 267 homes, of which 73 were reported as completed in this reporting period. The assisted homes are located in Bokeelia, Bonita Springs, Cape Coral, Estero, Fort Myers, Fort Myers Beach, Lehigh Acres, North Fort Myers, St James City and Sanibel; none were located in a flood hazard area.

Recovery and Resiliency Planning

23 planning activities have executed contracts with vendors who will be conducting planning studies. 19 planning activities are underway and 4 other planning activities have issued procurement solicitation packages.

Public Facilities and Critical Infrastructure Awards

21 agreements are in place for activities.

There were 4 (four) additional environmental review, Authority to Use Grant Funds received this quarter.

Affordable Single Family and Multifamily Housing Development Awards

- 19 Multifamily Housing projects (development and rehab) have received authority to use grant funds
- 7 multi-family housing development projects are under construction. This quarter construction began at Ekos on Evans and St Peter Claver Housing Phase II.

LINK

CDBG-DR site: <https://ian-cdbgdr.leegov.com/>

NOTE ON FINANCIALS: Lee County processed vouchers last quarter (April - June 2025) in the amount of \$193,410.56. That value was removed from a canceled activity and re-vouchered to three activities. The Financial field 'Total Funds Drawn' is correct at \$82,331,606.76, but the field for Total Funds Expended is overstated by \$193,410.56. The canceled activity 122VRAL didn't pull in the negative -\$193,410.56 to that calculation. We will work to get this corrected.

Project Summary

Project #, Project Title	This Report Program Funds Drawdown	To Date	
		Project Funds Budgeted	Program Funds Drawdown
20AD, Administration	\$609,830.92	\$55,394,050.00	\$4,869,259.07
21P, Planning	\$665,377.68	\$18,383,811.00	\$4,059,985.73
22HPA, Home Purchase Assistance	\$176,178.87	\$10,000,000.00	\$8,094,930.16
22MFH, Multifamily Housing Rehab and Development	\$12,042,324.35	\$324,093,529.00	\$16,184,556.64
22R, Individual Housing Rehabilitation, Reconstruction,	\$19,683,696.02	\$175,000,000.00	\$45,740,798.49
22SFH, Single Family Housing Development	\$140,176.78	\$50,000,000.00	\$583,172.65
22VRA, Voluntary Residential Acquisition	\$0.00	\$0.00	\$0.00
23PS, Public Services	\$143,079.00	\$15,000,000.00	\$1,030,002.20
24CI, Critical Public Facilities and Infrastructure	\$410,980.05	\$460,009,610.00	\$1,768,901.82
9999, Restricted Balance	\$0.00	(\$144,506,000.00)	\$0.00

Grantee Program Summary

23 Public Services

Grant	Proposed Budget		Proposed MID Threshold Budget HUD Identified		Proposed MID Threshold Budget Grantee Identified	
	This Period	To Date	This Period	To Date	This Period	To Date
B-23-UN-12-0002	\$ 0.00	\$ 15,000,000.00	\$ 0.00	\$ 15,000,000.00	\$ 0.00	\$ 0.00

Narrative: Public Service Programs

Various Public Service projects will be made available, key highlights for those projects and activities are included below.

Key Highlights for the Unmet Needs Long Term Recovery Group

Catholic Charities administered the county's microgrant program to close critical recovery gaps for disaster-impacted households. The program was structured to complement CDBG-DR by addressing needs not met through FEMA, SBA, insurance, or other federal programs. Eight micro grantees have drawn down funds in quarter and Catholic Charities is in the process of collecting and review the households assisted and beneficiary data.

22 Housing

Grant	Proposed Budget		Proposed MID Threshold Budget HUD Identified		Proposed MID Threshold Budget Grantee Identified	
	This Period	To Date	This Period	To Date	This Period	To Date
B-23-UN-12-0002	\$ 0.00	\$559,093,529.00	\$ 0.00	\$559,093,529.00	\$ 0.00	\$ 0.00

Narrative: Housing Programs

Key Highlights for LeeCares Hurricane Ian Housing Recovery

During the reporting period, Lee County continued to make significant progress in advancing its housing recovery efforts through the Home Purchase Assistance (HPA) Program and the Housing Rehabilitation, Reconstruction, and Elevation (HRRE) Program. Together, these programs are addressing critical housing needs caused by Hurricanes Ian, with a focus on long-term resiliency and stability for impacted households.

Home Purchase Assistance (HPA) Program

The HPA Program successfully assisted 5 households in achieving homeownership this quarter. These homes were located across Fort Myers, Cape Coral, and Lehigh Acres, reflecting the County's efforts to serve diverse communities across the region.

The assistance provided through HPA reduced financial barriers for low- to moderate-income households, enabling them to purchase safe, decent, and affordable homes. This support not only stabilizes families but also contributes to neighborhood revitalization and community recovery.

To date, the HPA Program has assisted a cumulative total of 98 households in Lee County. Each closing represents a meaningful step toward strengthening the County's long-term recovery goals.

Housing Rehabilitation, Reconstruction, and Elevation (HRRE) Program

The HRRE Program also experienced strong outcomes during the quarter. Construction was completed on 73 homes, bringing the cumulative total of homes completed under the program to 267. Of the homes completed this quarter, 60 were full reconstructions and 13 were rehabilitations, demonstrating the program's ability to address a wide range of storm-related damage.

An additional 83 homes remained under active construction at the close of the quarter, with completions expected in the coming months. Assisted households are geographically dispersed across Bokeelia, Bonita Springs, Cape Coral, Fort Myers, Fort Myers Beach, Lehigh Acres, North Fort Myers, Saint James City, and Sanibel, ensuring recovery is spread equitably throughout the County. Importantly, none of the completed or in-progress homes are located within a designated flood hazard area, aligning with HUD's floodplain management requirements.

Multi-Family Housing Development & Preservation Program

Lee County's Multifamily Housing Development and Preservation Program continues to advance, with construction actively underway on 7 awarded projects: Bayshore Pines, Hermosa North Fort Myers, Oak Park Senior Living, St. Peter Claver Housing, Ekos on Evans, Bloom Fort Myers, and Strayhorn Place. These developments represent a major portion of the County's affordable housing pipeline and will provide critical rental housing for households impacted by Hurricane Ian.

During the reporting period, site visits were conducted to all 7 projects, where construction activity is progressing substantially across multiple sections of the developments. Structural work is well underway: several building sections have completed ground-level walls and are advancing with vertical construction, while stairwells and elevator shafts are already in place. The presence of heavy equipment and active crews across the sites reflect strong momentum and steady advancement beyond foundational work, keeping the project on track for timely delivery.

Collectively, these multifamily projects will deliver hundreds of affordable rental units across Lee County. The County continues to coordinate closely with developers and monitor progress through site inspections, compliance checks, and draw reviews to ensure construction quality and adherence to all federal requirements. In addition, progress is ongoing toward closing on potential additional developments, which will further expand the supply of affordable and resilient housing in the County.

Single Family Housing Development

Lee County's Single-Family Housing Development Program continues to expand affordable homeownership opportunities for households impacted by recent disasters. Through partnerships with nonprofit and for-profit developers, the program is delivering new single-family homes designed to be energy-efficient, resilient, and affordable for low- to moderate-income families.

Active construction is underway at McNeill Village II, one of the program's awarded developments. A site visit conducted during the reporting period confirmed substantial progress across the site. All homes are now erected, with visible advancement in structural framing, roofing, and exterior sheathing. Several units have windows installed and house wrap applied, providing weather protection as interior work proceeds.

Looking ahead, the remaining single-family projects are expected to break ground within the next two quarters, ensuring continued momentum in the County's efforts to expand the supply of resilient, affordable housing for disaster-impacted families.

Fair Housing Activity

During the reporting period, Lee County Human & Veteran Services staff conducted a community-based Fair Housing outreach event at Kimmie's Recovery Zone, a nonprofit organization that provides essential services to the public, including a weekly food pantry serving local residents. On September 29, 2025, County staff participated in the pantry event, which operates every Monday from 11:00 a.m. to 1:00 p.m., to engage directly with community members and increase awareness of Fair Housing rights and protections.

A Fair Housing information table was set up onsite to provide educational materials, brochures, and interactive engagement opportunities. Staff members facilitated conversations with attendees about their rights under the

Fair Housing Act, emphasizing protections against discrimination based on race, color, national origin, religion, sex (including gender identity and sexual orientation), familial status, and disability. Participants were also invited to take part in an activity designed to help identify common housing challenges and discriminatory scenarios, which served as an informal yet effective tool to promote understanding of Fair Housing concepts. In addition to Fair Housing education, staff shared information about various Lee County programs and services, including housing assistance, veteran services, and disaster recovery resources. This holistic approach helped connect residents to available County programs while reinforcing the County's ongoing commitment to Affirmatively Furthering Fair Housing (AFFH) and ensuring equitable access to housing opportunities.

A total of 69 individuals were served during the event. All participants were personally greeted by Lee County staff, and the majority actively engaged in meaningful dialogue about Fair Housing topics, demonstrating community interest and awareness. These outreach activities continue to advance the County's Fair Housing goals by expanding education, reducing barriers to information, and strengthening partnerships with local community-based organizations serving vulnerable populations.



Figure 1. Event set-up

Related Links

Main Individual Housing site: <https://www.leeflcares.com/>

CDBG-DR site: <https://ian-cdbgdr.leegov.com/>

Fair Housing: <https://www.leegov.com/dhs/fairhousing>

24 Public Facilities and Infrastructure

Grant	Proposed Budget		Proposed MID Threshold Budget HUD Identified		Proposed MID Threshold Budget Grantee Identified	
	This Period	To Date	This Period	To Date	This Period	To Date
B-23-UN-12-0002	\$ 0.00	\$ 460,009,610.00	\$ 0.00	\$ 460,009,610.00	\$ 0.00	\$ 0.00

Narrative: Infrastructure Programs

The CDBG-DR Action Plan outlines various Public Facilities and Infrastructure projects. Key highlights for these projects are included below.

Key Highlights for Public Facilities and Critical Infrastructure

In September the Lee Board of County Commissioners approved awards for eight additional infrastructure projects. There are now thirty-one (31) infrastructure activities, there are 21 agreements in place. 12 Environmental Assessments (EAs) are complete and are all underway, some are waiting on site design elements before they can be completed.

Activities

Project #/ 20AD / Administration

Grantee Activity Number: 20AD

Activity Title: Administration

Activity Type:

Administration

Activity Status:

Under Way

Project Number:

20AD

Project Title:

Administration

Projected Start Date:

09/28/2022

Projected End Date:

11/30/2029

Benefit Type:

N/A

Completed Activity Actual End Date:

National Objective:

N/A

Responsible Organization:

Lee County, FL

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$55,394,050.00
Total Budget	\$0.00	\$55,394,050.00
Total Obligated	\$0.00	\$0.00
Total Funds Drawdown	\$609,830.92	\$4,869,259.07
Program Funds Drawdown	\$609,830.92	\$4,869,259.07
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$609,830.92	\$4,869,259.07
Lee County, FL	\$609,830.92	\$4,869,259.07
Most Impacted and Distressed Expended	\$609,830.92	\$4,869,259.07
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Lee County administration for Hurricane Ian CDBG-DR.

Location Description:

Lee County, FL

Activity Progress Narrative:

During this reporting period, Lee County utilized administrative funding to carry out overall program administration and oversight. Activities associated with draws completed for this activity include the following types of costs:

- Overall Grant Management
- Accounting and Financial Management
- Personnel
- Contracted Services for CDBG-DR Programs
- Supplies and Technology

Accomplishments Performance Measures

No Accomplishments Performance Measures

Beneficiaries Performance Measures

No Beneficiaries Performance Measures.

Activity Locations

Activity undertaken in Lee County, FL.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Project # / 21P / Planning**Grantee Activity Number: 121P****Activity Title: Planning - Activity Delivery****Activity Type:**

Planning

Activity Status:

Under Way

Project Number:

21P

Project Title:

Planning

Projected Start Date:

09/28/2022

Projected End Date:

09/30/2029

Benefit Type:

N/A

Completed Activity Actual End Date:**National Objective:**

N/A

Responsible Organization:

Lee County, FL

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$1,931,215.71
Total Budget	\$0.00	\$1,931,215.71
Total Obligated	\$0.00	\$1,931,215.71
Total Funds Drawdown	\$295,083.76	\$1,316,959.24
Program Funds Drawdown	\$295,083.76	\$1,316,959.24
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$295,083.76	\$1,316,959.24
Lee County, FL	\$295,083.76	\$1,316,959.24
Most Impacted and Distressed Expended	\$295,083.76	\$1,316,959.24
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Activity Delivery costs for CDBG-DR Planning activities.

Activity Progress Narrative:

During this reporting period, Lee County utilized activity delivery funding for Planning, including the following types of costs:

- Maintained activity specific policies and procedures
- Activity specific staff and contracted services

Awardees continue with the procurement process for selecting vendors.

Accomplishments Performance Measures

	This Report Period Total	Cumulative Actual Total / Expected Total
Activity funds eligible for DREF	0	0/0
# of community engagement	0	0/0
# of Plans or Planning Products	0	0/0

Beneficiaries Performance Measures

Accomplishments related to these costs will be reflected in DRGR upon execution of written agreements for specific planning activities.

Activity Locations

No Activity Locations

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents: None

Grantee Activity Number: DR10143
Activity Title: Bonita Springs Mobility Plan

Activity Type:
 Planning

Activity Status:
 Under Way

Project Number:
 21P

Project Title:
 Planning

Projected Start Date:
 08/01/2024

Projected End Date:
 08/01/2026

Benefit Type:
 N/A

Completed Activity Actual End Date:

National Objective:
 Low/Mod

Responsible Organization:
 City of Bonita Springs City Hall

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$500,000.00
Total Budget	\$0.00	\$500,000.00
Total Obligated	\$0.00	\$500,000.00
Total Funds Drawdown	\$394.08	\$394.08
Program Funds Drawdown	\$394.08	\$394.08
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$394.08	\$394.08
City of Bonita Springs	\$394.08	\$394.08
Most Impacted and Distressed Expended	\$394.08	\$394.08
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Transportation is a critical piece of the City's mobility puzzle. The City was incorporated in late 1999. The city limits incorporates approximately 47 square miles of land. There are numerous north south corridors to move

motorized and non-motorized traffic through the City. The major north/south corridors are Interstate 75, U.S. 41 (aka Tamiami Trail), Old 41 Road and Imperial Parkway. There are also a number of smaller residential collector roads that connect to the major corridors. However, there are only two (2) major east-west corridors that handles through traffic in the City, i.e., Bonita Beach Road and Terry Street. During hurricane and/or emergency events both east-west corridors are used primarily as evacuation corridors to Interstate 75. One of the critical issues to be evaluated in the study is to define the potential addition of east-west corridors the City can develop to move traffic more quickly and safer in the event of a major disaster. Each year during the City's budget cycle City Council develops Strategic Priorities (community goals). Transportation is the #2 priority following Stormwater Management. Both priorities go hand-in-hand in the development of a roadway improvements.

Location Description:

Lee County, FL - City of Bonita Springs

Activity Progress Narrative:

During this reporting period the vendor for the plan was selected as ADEAS-Q, the cost analysis and contract were developed and approved. The City of Bonita Springs executed the contract and the project kickoff meeting was held September 15th.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of community engagement	0	0/1
# of Plans or Planning Products	0	0/1

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Grantee Activity Number: DR10150
Activity Title: City of Fort Myers Stormwater Master Plan

Activity Type:
Planning

Activity Status:
Under Way

Project Number:
21P

Project Title:
Planning

Projected Start Date:
08/01/2024

Projected End Date:
09/30/2025

Benefit Type:
N/A

Completed Activity Actual End Date:

National Objective:
Low/Mod

Responsible Organization:
City of Fort Myres

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$772,824.00
Total Budget	\$0.00	\$772,824.00
Total Obligated	\$0.00	\$772,824.00
Total Funds Drawdown	\$58.32	\$58.32
Program Funds Drawdown	\$58.32	\$58.32
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$58.32	\$58.32
City of Fort Myers	\$58.32	\$58.32
Most Impacted and Distressed Expended	\$58.32	\$58.32
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

The plan is designed to reduce flooding risks to residents and businesses within the City of Fort Myers. The plan will complete additional mapping, analysis, modeling and completion of essential analysis to improve quality of life and stormwater infrastructure. The City of Fort Myers is located adjacent to several waterways including the Caloosahatchee River and Billy's creek and is susceptible to storm surge in the area. The plan will propose extensive mitigation efforts that will foster resiliency and protection of life and property in the event of an additional emergency.

The City of Fort Myers Stormwater Master Plan is an initiative designed to establish long range community development and sustainability strategies. The plan will update the existing 2008 plan in order to address the new and updated needs within the City of Fort Myers. The plan seeks to address three main objectives. First, the master plan intends to review existing modeling and watershed maps to implement the most accurate and refreshed approach. With an approximate 40,000 jump in population, increase in development, and new road implementation, it is essential for the plans to be comprehensive of the rapidly evolving nature of the city. The modelling will be shifted to ICPR software, which is best practice for Floridian Stormwater Departments, and updated to include any assumptions or information that is essential to the protection of the City. Secondly, the plan will add both a Water Quality and a Basin Management Action Plan Chapter that will address City obligations for water quality improvements into the Caloosahatchee River. This should also investigate where new watershed project should be located in order to produce the best value. The City is committed to implementing best practices in any updates in order to maximize funds and to ensure actions taken are appropriate, reasonable, and cost effective. Thirdly, the plan will be obligated to add a resiliency chapter that addresses the needs of the city to remain proactive in addressing higher levels in the Caloosahatchee River and the increasing intensity of storm events. Especially after the devastating effects of Hurricane Ian, the City is even more cognizant of the duty of municipal government to install and maintain effective and efficient mitigation initiatives that include full stormwater analyses.

Location Description:

Lee County, FL - City of Fort Myers

Activity Progress Narrative:

During this reporting period the City of Fort Myers Council authorized negotiations to begin with Water Resources Management, Inc., the highest ranked respondent, for the Stormwater Master Plan, RSQ 25-048. In the event negotiations are not successful, authority was given to end negotiations with the highest ranked respondent and begin negotiations with the second highest ranked respondent. Contract negotiations are ongoing.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of community engagement	0	0/2
# of Plans or Planning Products	0	0/1

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Grantee Activity Number: DR10151

Activity Title: City of Fort Myers Comprehensive Plan

Activity Type:

Planning

Activity Status:

Under Way

Project Number:

21P

Project Title:

Planning

Projected Start Date:

08/01/2024

Projected End Date:

09/30/2025

Benefit Type:

N/A

Completed Activity Actual End Date:

National Objective:

Low/Mod

Responsible Organization:

City of Fort Myres

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$50,000.00
Total Budget	\$0.00	\$50,000.00
Total Obligated	\$0.00	\$50,000.00
Total Funds Drawdown	\$1,311.59	\$50,000.00
Program Funds Drawdown	\$1,311.59	\$50,000.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$1,311.59	\$50,000.00
City of Fort Myers	\$1,311.59	\$50,000.00
Most Impacted and Distressed Expended	\$1,311.59	\$50,000.00
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

The City of Fort Myers Comprehensive Plan will mitigate future risks to properties (including residences and business) address future zoning concerns, and provide for the update of the community's goals and policies regarding its future. This will be inclusive if residential and multifamily housing open space, costal

management and infrastructure. particular attention will be paid to infrastructure demands and affordable housing needs to support the exponential growth within the City. The plan will also provide resiliency aspects to the City's plans and input considerations that support resiliency throughout the considerations of the future goals of the city. Because the comprehensive plan takes an all-inclusive look at the characterization of the city, and attempts to establish goals with longevity, the continued resilience of the City will be top of mind as the plan is being completed. With Hurricane Ian recovery still ongoing, it is expected that the comprehensive plan will include recovery, rebuilding and future resiliency for the entirety of the community.

Location Description:

Lee County, FL - City of Fort Myers

Activity Progress Narrative:

During this reporting period the City of Fort Myers provided the completed CDBG-DR funded portion of the plan for Community Engagement. Closeout for this project has been initiated.

Public meetings were held with Planning Board July 2, Aug. 6, and Sept. 3. A workshop (in person) with the Planning Board was held on Sept. 5 at Collaboratory – with a focus on data and public input. Totaling 4 public meetings.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of community engagement	4	4/4
# of Plans or Planning Products	1	1/1

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents: None
20

Grantee Activity Number: DR10152
Activity Title: City of Fort Myers THIRA

Activity Type:
Planning

Activity Status:
Under Way

Project Number:
21P

Project Title:
Planning

Projected Start Date:
08/01/2024

Projected End Date:
09/30/2025

Benefit Type:
N/A

Completed Activity Actual End Date:

National Objective:
Low/Mod

Responsible Organization:
City of Fort Myres

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$250,000.00
Total Budget	\$0.00	\$250,000.00
Total Obligated	\$0.00	\$250,000.00
Total Funds Drawdown	\$61.83	\$61.83
Program Funds Drawdown	\$61.83	\$61.83
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$61.83	\$61.83
City of Fort Myers	\$61.83	\$61.83
Most Impacted and Distressed Expended	\$61.83	\$61.83
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

The City of Fort Myers Threats Hazards Incidents and Risk Assessment will build a culture of preparedness requires the nation to understand what risks to prepare for and how to prepare for them. A Threat and Hazard Identification and Risk Assessment would assess the impacts of the most catastrophic threats and hazards to our community and establishes capability targets to manage them. The Threat and Hazard Identification and

Risk Assessment (THIRA) process helps communities understand the normal set of risks it faces. By identifying and prioritizing those threats, a community can then make smarter decisions. Leaders need to manage the risks through:

- Appropriate planning
- Mitigation strategies
- Developing needed capabilities

Risk is the potential for an unwanted outcome resulting from an incident, event, or occurrence, as determined by its likelihood and the associated consequences. By considering changes to these elements, a community can understand how to best manage and plan for its greatest risks across the full range of the threats and hazards it faces. The Threat and Hazard Identification and Risk Assessment (THIRA) is a three-step risk assessment process that helps communities answer the following questions:

- What threats and hazards can affect our community?
- If they occurred, what impacts would those threats and hazards have on our community?

Based on those impacts, what capabilities should our community have? The THIRA helps communities understand their risks and determine the level of capability they need in order to address those risks. The outputs that form this process lay the foundation for determining a community's capability gaps as part of the Stakeholder Preparedness Review? The proposed project will develop this specific and hyper local analysis for the City of Fort Myers.

Location Description:

Lee County, FL - City of Fort Myers

Activity Progress Narrative:

During this reporting period the City of Fort Myers worked to align the scope and timeline in the contract with the selected vendor. The contract for the plan was executed on September 18th.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Plans or Planning Products	0	0/1

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents: None

Grantee Activity Number: DR10156

Activity Title: Lee County School District Vulnerability Assessment

Activity Type:

Planning

Activity Status:

Under Way

Project Number:

21P

Project Title:

Planning

Projected Start Date:

08/01/2024

Projected End Date:

08/01/2026

Benefit Type:

N/A

Completed Activity Actual End Date:

National Objective:

Low/Mod

Responsible Organization:

Lee County School Board

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$500,000.00
Total Budget	\$0.00	\$500,000.00
Total Obligated	\$0.00	\$500,000.00
Total Funds Drawdown	\$44,498.60	\$44,498.60
Program Funds Drawdown	\$44,498.60	\$44,498.60
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$44,498.60	\$44,498.60
Lee County School Board	\$44,498.60	\$44,498.60
Most Impacted and Distressed Expended	\$44,498.60	\$44,498.60
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

The proposed vulnerability assessment will be the first time the District has performed a detailed, formal, assessment of the resiliency of their land and properties. By identifying current and future hazards, assessing the impact of these hazards to the District's land and property, and developing an adaptation plan, the District can work to mitigate impact to its operations and continue to provide community lifeline services such as

shelter, food, and emergency response services following a significant storm event. The vulnerability assessment will allow the District to determine high priority mitigation strategies for its most vulnerable properties. By ensuring continued operation, the District can remain consistent in providing community lifelines throughout the county. In addition, the District may utilize the data received from the vulnerability assessment to identify high need areas within the county. This may result in priority capital projects for additional schools that can function as shelters, special needs shelter options, or pet shelter options.

The School District of Lee County, Florida ("District") will develop a county-wide vulnerability assessment that builds upon both the Lee County After Action Report from Hurricane Ian and the 2022 Lee County Hazard Identification and Risk Assessment. The District's vulnerability assessment will include an assessment of all property and land owned by the District to determine current and future resiliency to all hazards. As part of the overall vulnerability assessment, the District intends to conduct an initial risk assessment to gather information on current, future, and reoccurring hazards that impact District properties. Further analysis will provide the potential impacts of these hazards on the District and likelihood for repetitive loss. An adaptation plan will be developed as part of the vulnerability assessment, offering recommendations to the District on prioritizing and implementing the best measures to mitigate current and future vulnerabilities of properties.

Location Description:

Lee County, FL

Activity Progress Narrative:

During this reporting period the School District team met with the Weston and Sampson team (planning vendor) for the physical assessment of the school buildings. The team went to the schools with architects and engineers and assessed the properties for all hazards. The vendor presented a status report on September 15th.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Plans or Planning Products	0	0/1

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents: None

Grantee Activity Number: DR10159
Activity Title: Estero Eco-Historic Planning Study

Activity Type:
Planning

Activity Status:
Under Way

Project Number:
21P

Project Title:
Planning

Projected Start Date:
08/01/2024

Projected End Date:
07/30/2026

Benefit Type:
N/A

Completed Activity Actual End Date:

National Objective:
Low/Mod

Responsible Organization:
Village of Estero

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$450,000.00
Total Budget	\$0.00	\$450,000.00
Total Obligated	\$0.00	\$450,000.00
Total Funds Drawdown	\$6,500.00	\$6,500.00
Program Funds Drawdown	\$6,500.00	\$6,500.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$6,500.00	\$6,500.00
Village of Estero	\$6,500.00	\$6,500.00
Most Impacted and Distressed Expended	\$6,500.00	\$6,500.00
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

The Village of Estero is seeking to conduct a land use study to address significant unmet needs in spatial planning, infrastructure development, and resilience building in the historically underserved areas around “Old Estero” and Koreshan State Park. This initiative recognizes the critical gap in current land use planning that fails to adequately consider the unique environmental, historical, and socio-economic contexts of the area. The

absence of a comprehensive master plan has left these regions vulnerable to the impacts of climate change, including flooding and storm surges, and hindered sustainable development and economic growth. The proposed study aims to:

- Identify and propose solutions for spatial and infrastructural deficiencies, emphasizing sustainable land management and zoning reforms that support resilient community development.
- Integrate resilience and sustainability into land use planning, ensuring that future development is aligned with environmental conservation principles and capable of withstanding climate-related challenges.
- Enhance community livability and economic vitality by proposing land use strategies that foster economic opportunities, improve access to affordable housing, and enhance recreational and green spaces.

Aligning closely with the Village's Comprehensive Plan and Vision, this land use study seeks to bridge the gap between current conditions and the community's aspirations for a sustainable, resilient, and vibrant future. By focusing on sustainable growth, the study will contribute to the Village's long-term goals.

Location Description:

Lee County, FL – Village of Estero

Activity Progress Narrative:

During this reporting period the Village of Estero, in collaboration with LandDesign, has made significant progress on the Eco-Historic Planning Study. Key activities completed include:

- Continued data collection and base mapping efforts;
- Ongoing review of data, plans, studies, and other materials provided by the Village;
- Continued assessment of existing conditions, including transportation, market demand, environmental and cultural resources, and feasibility analysis;
- Completion of the Existing Conditions Analysis;
- Refinement of design and planning principles and strategies;
- Development of project branding elements, including logo and tagline;
- Delivery of initial Existing Conditions reports: o Market Demand Analysis by RCLCO o Environmental Report by BDA o Transportation Narrative and Mapping by Kittelson o Utilities Assessment by LandDesign
- Coordination through regular team status meetings; and
- Review and discussion of existing conditions report with Village staff and the design team.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of community engagement	1	1/10
# of Plans or Planning Products	0	0/1

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail
No Other Match Funding Sources

Activity Supporting Documents:	None
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Grantee Activity Number: DRMOA106
Activity Title: Behavioral Health System Plan

Activity Type:
Planning

Activity Status:
Under Way

Project Number:
21P

Project Title:
Planning

Projected Start Date:
08/01/2024

Projected End Date:
07/31/2026

Benefit Type:
N/A

Completed Activity Actual End Date:

National Objective:
Low/Mod

Responsible Organization:
Lee County, FL

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$650,000.00
Total Budget	\$0.00	\$650,000.00
Total Obligated	\$0.00	\$650,000.00
Total Funds Drawdown	\$317,469.50	\$317,469.50
Program Funds Drawdown	\$317,469.50	\$317,469.50
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$317,469.50	\$317,469.50
Lee County, FL	\$317,469.50	\$317,469.50
Most Impacted and Distressed Expended	\$317,469.50	\$317,469.50
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Lee County experienced significant loss because of Hurricane Ian resulting in widespread damage and unmet need. The Lee County Coordinated Entry line established as an access point for services and support for

households impacted by Hurricane Ian receives daily calls and has led to the completion of over 2,000 unmet needs assessments, identifying the need for behavioral health services. The resulting strategic plan shall not only outline these aspects but also provide clear implementation steps promoting resiliency and recovery-oriented services. In assembling the plan, the vendor shall: develop a strategy to raise community awareness; identify community partners, key positions and roles required for the successful implementation and on-going operation of the system; establish a framework for ongoing data collection and analysis; develop a budget to encompass the initial implementation phase, as well as the ongoing maintenance and operation of the system; and identify and incorporate additional steps necessary for the plans success, as needed. The deliverable is a digital report that includes implementation steps for an integrated system approach. A final consolidated report encompassing all three phases into one final report—the Lee County Behavioral Health System of Care Implementation Plan.

Location Description:

Lee County, FL

Activity Progress Narrative:

During this reporting period the plan progressed by working with the vendor, Third Horizon Strategies, incorporating edits into the phase 2 deliverable and additional research on youth behavioral health issues and impacts of the hurricanes. On September 4th a 90-minute webinar was conducted to provide community stakeholders with an update on plan progress.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Plans or Planning Products	0	0/1

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents: None

Project # / 22HPA / Home Purchase Assistance**Grantee Activity Number: 122HPAL****Activity Title: Home Purchase Assistance - Activity Delivery****Activity Type:**

Homeownership Assistance to low- and moderate-income

Activity Status:

Under Way

Project Number:

22HPA

Project Title:

Home Purchase Assistance

Projected Start Date:

10/01/2023

Projected End Date:

09/30/2029

Benefit Type:

N/A

Completed Activity Actual End Date:**National Objective:**

Low/Mod-Income Housing

Responsible Organization:

Lee County, FL

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$1,700,000.00
Total Budget	\$0.00	\$1,700,000.00
Total Obligated	\$0.00	\$1,700,000.00
Total Funds Drawdown	\$26,178.87	\$1,514,140.58
Program Funds Drawdown	\$26,178.87	\$1,514,140.58
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$26,178.87	\$1,514,140.58
Lee County, FL	\$26,178.87	\$1,514,140.58
Most Impacted and Distressed Expended	\$26,178.87	\$1,514,140.58
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Activity Delivery Costs for Home Purchase Assistance activities. See activity 22HPA for outcome and beneficiary data.

Location Description:

Activity Delivery Costs for Home Purchase Assistance activities undertaken within Lee County.

Activity Progress Narrative:

During this reporting period, Lee County utilized activity delivery funding for Home Purchase Assistance. Activities including the following types of costs:

- Maintained activity specific policies and procedures
- Processing applications for assistance
- Project specific Environmental Reviews
- Activity specific legal services (drafting contracts)
- Activity specific staff and contracted services

Accomplishments associated with these activity delivery costs are being reported in the Home Purchase Assistance activity (22HPAL).

Beneficiaries Performance Measures

See activity 22HPAL for outcome and beneficiary data.

Activity Locations

No Activity Locations

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Grantee Activity Number: 22HPAL
Activity Title: Home Purchase Assistance

Activity Type:

Homeownership Assistance to low- and moderate-income

Activity Status:

Under Way

Project Number:

22HPA

Project Title:

Home Purchase Assistance

Projected Start Date:

2/01/2024

Projected End Date:

01/20/2029

Benefit Type:

Direct Benefit (Households)

Completed Activity Actual End Date:

National Objective:

Low/Mod-Income Housing

Responsible Organization:

Lee County, FL

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$8,300,000.00
Total Budget	\$0.00	\$8,300,000.00
Total Obligated	\$0.00	\$8,300,000.00
Total Funds Drawdown	\$150,000.00	\$6,580,789.58
Program Funds Drawdown	\$150,000.00	\$6,580,789.58
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$150,000.00	\$6,580,789.58
Lee County, FL	\$150,000.00	\$6,580,789.58
Most Impacted and Distressed Expended	\$150,000.00	\$6,580,789.58
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Home Purchase Assistance to create homeownership opportunities for Lee County residents. Activity to be undertaken in Lee County, FL by Lee County.

Location Description:

Activities undertaken within Lee County, FL.

Activity Progress Narrative:

During the reporting period, the Home Purchase Assistance (HPA) Program successfully assisted four (4) households in achieving homeownership. These households represent a diverse cross-section of Lee County residents who were previously unable to access stable housing due to rising market costs, credit challenges, and the impacts of Hurricanes Ian.

Through the program's direct down payment and closing cost assistance, each household was able to purchase a safe, decent, and affordable home that meets HUD's property standards and program eligibility criteria. The homes purchased this quarter were geographically distributed across Fort Myers, Cape Coral, and Lehigh Acres, furthering the County's strategic goal of supporting equitable housing opportunities across multiple communities.

The program's impact extends beyond the four families assisted; it also contributes to neighborhood stabilization by increasing the number of owner-occupied homes in communities that were previously vulnerable to vacancy or investor speculation. Each closing was carefully reviewed to ensure compliance with all applicable federal requirements, including environmental review, property eligibility checks, and verification of affordability. None of the homes purchased were located within Special Flood Hazard Areas (SFHAs), consistent with HUD floodplain management requirements.

To date, the County has assisted a total of 98 households in purchasing homes through the HPA Program. This cumulative achievement reflects the program's continued success in providing disaster-impacted residents with a pathway to long-term housing stability and resilience.

In total, the assistance provided this quarter represents a meaningful step forward in expanding access to affordable homeownership in Lee County. By helping four households purchase homes in Fort Myers, Cape Coral, and Lehigh Acres, and bringing the cumulative total to 98 households assisted to date, the HPA Program is directly contributing to HUD's national objectives of providing decent housing and supporting long-term disaster recovery for storm-impacted residents.



Figure 2. Home purchase in Fort Myers, FL



Figure 3. Home purchased in Lehigh Acres, FL



Figure 4. Home purchased in Cape Coral, FL

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	5	99/115
# of Multifamily Units	0	0/0
# of Single family Units	5	99/115

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	1	4	5	25/50	74/65	99/115	100%
# Owner	1	4	5	25/50	74/65	99/115	100%

Activity Locations

Activity undertaken within Lee County, Florida.

Individual Housing Project records are exempt per Florida Statute Section 119.071(5)(f)1.b

Other Funding Sources

No Other Funding Sources Found

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Activity Supporting Documents:

None

Project # / 22MFH / Multifamily Housing Rehab and Development

Grantee Activity Number: 122MFHL

Activity Title: Multifamily Housing Development - Activity Delivery

Activity Type:

Construction of new housing

Activity Status:

Under Way

Project Number:

22MFH

Project Title:

Multifamily Housing Rehab and
Development

Projected Start Date:

10/01/2023

Projected End Date:

09/30/2029

Benefit Type:

N/A

Completed Activity Actual End Date:

National Objective:

Low/Mod-Income Housing

Responsible Organization:

Lee County, FL

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$35,000,000.00
Total Budget	\$0.00	\$35,000,000.00
Total Obligated	\$0.00	\$35,000,000.00
Total Funds Drawdown	\$2,262,011.22	\$3,809,665.35
Program Funds Drawdown	\$2,262,011.22	\$3,809,665.35
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$2,262,011.22	\$3,809,665.35
Lee County, FL	\$2,262,011.22	\$3,809,665.35
Most Impacted and Distressed Expended	\$2,262,011.22	\$3,809,665.35
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Activity delivery for multi-family housing development and preservation programs. See 22MFH Activities to view outcomes and beneficiaries.

Location Description:

Lee County, FL.

Activity Progress Narrative:

During this reporting period, Lee County utilized activity delivery funding for Multifamily Housing Development including the following types of costs:

- Maintaining activity specific policies and procedures
- Management of developer onboarding
- Processing of underwriting, risk assessments and preparation of developer/subrecipient agreements
- Project specific Environmental Reviews
- Activity specific staff and contracted services
- Activity specific legal services (drafting contracts)

Accomplishments related to these costs will be reflected in future DRGR activities.

Regarding Expenditures: \$1,973,816.65 that had been drawn under activity 122MFH . Lee County has corrected the vouchers and assigned those charges to the correct activity DR10438, St Peter Claver Housing Phase II.

Beneficiaries Performance Measures

Accomplishments related to these costs will be reflected DRGR upon execution of written agreements for specific rehabilitation activities.

Activity Locations

Activities undertaken within Lee County, FL.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:	None
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Grantee Activity Number: DR10341
Activity Title: Bayshore Pines

Activity Type:

Construction of new housing

Activity Status:

Underway

Project Number:

22MFH

Project Title:

Multifamily Housing Rehab and Development

Projected Start Date:

12/17/2024

Projected End Date:

11/30/2026

Benefit Type:

Direct Benefit (Households)

Completed Activity Actual End Date:

National Objective:

Low/Mod-Income Housing

Responsible Organization:

OHG FL Lee I Bayshore LP

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$17,00,000.00
Total Budget	\$0.00	\$17,00,000.00
Total Obligated	\$0.00	\$17,00,000.00
Total Funds Drawdown	\$2,225,621.92	\$4,555,621.92
Program Funds Drawdown	\$2,225,621.92	\$4,555,621.92
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$2,225,621.92	\$4,555,621.92
OHG FL Lee I Bayshore LP	\$2,225,621.92	\$4,555,621.92
Most Impacted and Distressed Expended	\$2,225,621.92	\$4,555,621.92
Other Funds	\$0.00	\$0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

The Bayshore Pines project will focus on creating a resilient, community-centered, affordable housing development in North Fort Myers, Florida. Designed to meet National Green Building Standards, the project

incorporates hurricane-rated concrete block construction, elevating buildings to two feet above base flood level and integrating energy-efficient features like low-flow fixtures and Energy Star appliances. With 180 units set aside at 60% of Area Median Income for a 99-year affordability term, Bayshore Pines provides substantial economic relief to residents through reduced rents. Community-focused amenities, including a clubhouse, gym, pool, and outdoor spaces, foster a supportive environment where residents can thrive, while safety features like perimeter barriers and controlled access ensure a secure living space. This approach emphasizes long-term sustainability and a high quality of life for low- to moderate-income families.

Location Description:

Bayshore Pines
5361 Bayshore Road
North Fort Myers, FL 32955

Activity Progress Narrative:

Construction activities are ongoing at Bayshore Pines. The project continues to advance through the construction phase, with all required local and state permits secured and active coordination among the developer, general contractor, and project management team.

During the reporting period, work focused on completing vertical construction and site infrastructure improvements, including foundation systems, framing, utility connections, and stormwater management components.

Despite typical weather-related delays, overall project progress remains steady and in alignment with the approved construction schedule. The County and development team continue to meet biweekly to review milestones, address field conditions, and ensure timely resolution of any construction or compliance-related issues.



Figure 5. Construction progress

Section 3 Qualitative Efforts:

- Direct, on-the job training (including apprenticeships)
- Outreach efforts to identify and secure bids from Section 3 business concerns

- Other: Provide Section 3 technical assistance to all subcontractors working on the project.

During the reporting period, Bayshore Pines reported a total of 7,723 labor hours, of which 2,299 hours (29.8%) were performed by Section 3 workers. While no Targeted Section 3 worker hours were reported this quarter, the Developer continues to make strong, proactive efforts to meet Section 3 benchmarks and uphold HUD's commitment to providing economic opportunities to low- and very low-income persons.

Ongoing Section 3 training is being conducted regularly with all site Subcontractors and individually as new Subcontractors begin work. The General Contractor has no reportable labor hours; therefore, achieving compliance benchmarks relies solely on the cooperation and participation of the Subcontractors. At this time, there are no Subcontractors actively hiring. As Section 3 regulations do not require the creation of new positions solely to meet program benchmarks, all Subcontractors are instead encouraged to hire locally and to the greatest extent feasible within the project area.

Developers and County staff have encouraged businesses to pursue Section 3 Business certification, which would allow their workers to be counted toward Targeted Section 3 benchmarks. However, most Subcontractors maintain a workforce significantly larger than the portion assigned to the Bayshore Pines project, and therefore their companies as a whole do not qualify as Section 3 Businesses.

Despite these challenges, the Developer and Construction Management team continue to demonstrate good faith efforts to comply with Section 3 requirements. Regular trainings and communications are ongoing throughout construction with the goal of improving local hiring outcomes and achieving targeted participation in upcoming reporting periods.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Elevated Structure	4	4/4
# of Section 3 Labor Hours	2298	2754/25000
# of Targeted Section 3 Laor	0	22/5500
# of Total Labor Hours	7723	8635/100000

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	0/180
# of Multifamily Units	0	0/180

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0	0	0	0/180	0/0	0/180	0
# Renter	0	0	0	0/180	0/0	0/180	0

Activity Locations

5361 Bayshore Road, North Fort Myers, FL 32955

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail
No Other Match Funding Sources

Activity Supporting Documents: None

Grantee Activity Number: DR10343
Activity Title: Strayhorn Place

Activity Type:

Construction of new housing

Activity Status:

Underway

Project Number:

22MFH

Project Title:

Multifamily Housing Rehab and Development

Projected Start Date:

06/06/2025

Projected End Date:

05/30/2027

Benefit Type:

Direct Benefit (Households)

Completed Activity Actual End Date:

National Objective:

Low/Mod-Income Housing

Responsible Organization:

EBS Senior Living LLC

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$17,655,877.00	\$17,655,877.00
Total Budget	\$17,655,877.00	\$17,655,877.00
Total Obligated	\$0.00	\$0.00
Total Funds Drawdown	\$0.00	\$0.00
Program Funds Drawdown	\$0.00	\$0.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$0.00
EBS Senior Living LLC	\$0.00	\$0.00
Most Impacted and Distressed Expended	\$0.00	\$0.00
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

SWFL Affordable Housing Choice Foundation, Inc., in partnership with the Housing Authority of the City of Fort Myers, is developing an 80-unit Senior Affordable Housing Community to serve seniors aged 62 and

older on fixed incomes at or below 50% of the Area Median Income (AMI) for Lee County. This new development is called Strayhorn place and will replace Royal Palm Towers, a 60-year-old public housing building in downtown Fort Myers at 1935 Lafayette Street, which sustained significant damage during Hurricane Ian and was further compromised by its aging infrastructure. The project will provide safe, resilient, and modern housing for one of the County's most vulnerable populations, incorporating full facility generators, a warming kitchen for hot meals after storm events, and the ability to shelter an additional 40 disabled adults during emergencies. Designed to current building codes with environmentally conscious features, the community will also promote health and social well-being by including an on-site gym, small health clinic, visiting nurses' office, business center, game room, movie theater, and social gathering spaces supported by partner organizations. Residents will benefit from improved living conditions, close access to groceries and medical providers, and programs encouraging physical and mental health. In addition, the \$27 million development will generate significant economic impact through construction jobs and Section 3 opportunities. Completion of the new senior community is anticipated in April 2026.

Location Description:

1935 Lafayette St, Fort Myers, FL 33916

Activity Progress Narrative:

During the reporting period, progress was made at the multifamily housing development Strayhorn Place, with site activity advancing from foundation preparation to early structural installation. The stem wall has been fully set in place, establishing the structural framework necessary for upcoming vertical construction.

As seen in the site photos, formwork, rebar, and block installation are complete, and concrete pours have been successfully conducted across multiple foundation sections. Crews remain active throughout the site, coordinating heavy equipment operations, reinforcing walls, and preparing for the next phase of construction. With foundational components now established, electrical and plumbing rough-ins are scheduled to begin next, marking a major transition toward infrastructure installation. Overall, the project continues to progress steadily and remains on schedule, with strong coordination between the general contractor, subcontractors, and County oversight staff to ensure compliance with all federal construction and safety standards.



Figure 6. Construction progress

Section 3 Qualitative Efforts:

- Held one of more job fairs

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Elevated Structure	0	0/1
# of Section 3 Labor Hours	973	973/0
# of Targeted Section 3 Laor	0	0/0
# of Total Labor Hours	1530	1530/0

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	0/80
# of Multifamily Units	0	0/80

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0	0	0	0/80	0/0	0/80	0
# Renter	0	0	0	0/80	0/0	0/80	0

Activity Locations

1935 Lafayette Street, Fort Myers, FL 33916

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Grantee Activity Number: DR10409
Activity Title: Bloom Fort Myers

Activity Type:

Construction of new housing

Activity Status:

Underway

Project Number:

22MFH

Project Title:

Multifamily Housing Rehab and Development

Projected Start Date:

05/30/2025

Projected End Date:

12/30/2027

Benefit Type:

Direct Benefit (Households)

Completed Activity Actual End Date:

National Objective:

Low/Mod-Income Housing

Responsible Organization:

2010 Hanson LLC

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$20,000,000.00
Total Budget	\$0.00	\$20,000,000.00
Total Obligated	\$0.00	\$20,000,000.00
Total Funds Drawdown	\$2,111,356.30	\$2,111,356.30
Program Funds Drawdown	\$2,111,356.30	\$2,111,356.30
Program Income Drawdown	\$ 0.00	\$ 0.00
Program Income Received	\$ 0.00	\$ 0.00
Total Funds Expended	\$2,111,356.30	\$2,111,356.30
2010 Hanson LLC	\$2,111,356.30	\$2,111,356.30
Most Impacted and Distressed Expended	\$2,111,356.30	\$2,111,356.30
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Bloom Fort Myers is a shovel-ready, transformative workforce housing development proposed for 2010 Hanson

Street, just two miles south of Downtown Fort Myers and less than a mile from Lee Memorial Hospital. The project will deliver 336 resilient units, of which 172 are affordable, green-certified apartment units designed to provide long-term housing stability for essential workers and middle-income families who are increasingly priced out of the local market.

Situated in a Qualified Census Tract and along the busy US-41 corridor, Bloom Fort Myers directly addresses the affordable housing crisis facing the City of Fort Myers and Lee County in the wake of Hurricane Ian, which eliminated more than 15,000 housing units. Amid skyrocketing rents and limited supply, this development stands as one of the few, if not the only, ground-up workforce housing projects in Lee County—offering much-needed housing for teachers, nurses, firefighters, police officers, and hospitality staff who are vital to the region's economy but unable to find stable housing near their jobs.

The complex will feature structured parking, hurricane-rated concrete block and hollow-core plank construction, impact windows, granite countertops, stainless steel appliances, in-unit laundry, a resort-style pool, fitness center, outdoor recreation spaces, and green areas. With a fully vetted Guaranteed Maximum Price (GMP) contract and experienced construction and property management partners secured, the project is prepared to proceed upon funding and carries mitigated construction risk.

Location Description:

2010 Hanson Street
Fort Myers, FL 33901

Activity Progress Narrative:

During the reporting period, construction at Bloom Fort Myers advanced significantly, reflecting steady progress across both building pads. The project, which will deliver much-needed 172 affordable housing units in Fort Myers, continues to move forward in alignment with the approved construction schedule.

Structural block installation for the first-floor walls has been completed, with visible progress across the entire development footprint. Concrete slabs, block walls, and stairwells have been poured and cured, establishing the framework for the vertical structure. Reinforcement and formwork are in place in preparation for the next phase of vertical construction.

The most recent site inspection confirmed that the first-floor masonry work is complete, and preparations for the second-floor decking and reinforcement are underway. Workers are actively installing electrical and plumbing rough-ins within ground-floor units, as evidenced by the interior photos showing layout markings and plumbing stub-outs. Stair structures have been poured, providing permanent access to upper levels for ongoing work.

An aerial photo taken on September 16, 2025, illustrates the full site layout and active equipment on both building pads, highlighting substantial progress in foundation, masonry, and slab work. The overall site remains well organized, with clear delineation of staging areas and continued compliance with construction safety standards.



Figure 7. Construction progress

Section 3 Qualitative Efforts:

- Direct, on-the job training (including apprenticeships)
- Other: Continuously provided Section 3 training to Contractors and Subcontractors

During the reporting period, the Bloom Fort Myers development team continued to make diligent efforts to meet Section 3 participation benchmarks. Although the project did not achieve the Targeted Section 3 worker benchmark this quarter, the developer and its contractors remain committed to promoting HUD's mission of directing economic opportunities to low- and very low-income persons to the greatest extent feasible.

The Bloom team continues to encourage subcontractors and businesses to pursue Section 3 Business certification and to identify eligible workers who qualify as Section 3 or Targeted Section 3 employees. However, most subcontractors maintain a workforce much larger than the number of employees assigned specifically to the Bloom project, resulting in their companies as a whole not meeting the criteria to qualify as Section 3 Businesses.

Despite these challenges, the developer remains proactive in implementing regular Section 3 trainings and outreach throughout construction. These sessions are designed to educate contractors and subcontractors on compliance requirements, promote local hiring where possible, and increase the likelihood of achieving targeted participation in future reporting periods.

Total labor hours during the reporting period: 12,868 hours

Total section 3 labor hours: 9,800 hours

Total targeted section 3 hours: 0 hours

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Section 3 Labor Hours	9800	9800/41600
# of Targeted Section 3 Laor	0	0/8230
# of Total Labor Hours	12868	12868/166400

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	0/172
# of Multifamily Units	0	0/172

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	0/172	0/172	0
# Renter	0	0	0	0/0	0/172	0/172	0

Activity Locations

2010 Hanson Street, Fort Myers, FL 33901

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents: None

Grantee Activity Number: DR10438
Activity Title: St Peter Claver Housing Phase II

Activity Type:

Construction of new housing

Activity Status:

Underway

Project Number:

22MFH

Project Title:

Multifamily Housing Rehab and Development

Projected Start Date:

06/062025

Projected End Date:

12/22/2027

Benefit Type:

Direct Benefit (Households)

Completed Activity Actual End Date:

National Objective:

Low/Mod-Income Housing

Responsible Organization:

St Peter Claver Housing Inc

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$17,200,000.00	\$17,200,000.00
Total Budget	\$17,200,000.00	\$17,200,000.00
Total Obligated	\$17,200,000.00	\$17,200,000.00
Total Funds Drawdown	\$946,652.49	\$946,652.49
Program Funds Drawdown	\$946,652.49	\$946,652.49
Program Income Drawdown	\$ 0.00	\$ 0.00
Program Income Received	\$ 0.00	\$ 0.00
Total Funds Expended	\$946,652.49	\$946,652.49
St Peter Claver Housing Inc	\$946,652.49	\$946,652.49
Most Impacted and Distressed Expended	\$946,652.49	\$946,652.49
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

St. Peter Claver Place II is the second phase of a multi-family affordable housing development located at 3681 Michigan Avenue in Fort Myers, Florida. The project will deliver 72 newly constructed rental units, including a mix

of one-, two-, and three-bedroom apartments, all reserved for income-eligible households earning at or below 60% of the Area Median Income (AMI), with designated set-asides for very low-income and special needs populations. Units will feature energy-efficient appliances, in-unit washers and dryers, durable finishes, and access to community amenities such as a clubhouse and shared open spaces. The development builds upon the infrastructure and community facilities established in Phase I, leveraging economies of scale to expand affordable housing opportunities in a high-demand area. Supported with CDBG-DR funds in coordination with Low-Income Housing Tax Credits (LIHTC) and other financing sources, the project directly addresses the post-disaster recovery need for resilient, decent, safe, and affordable housing, while contributing to the long-term revitalization goals of the City of Fort Myers and Lee County.

Location Description:

3681 Michigan Ave, Fort Myers, FL 33916

Activity Progress Narrative:

The St. Peter Claver Housing development is an awarded multifamily project under Lee County's Disaster Recovery Housing portfolio and will deliver 72 new affordable rental units in the City of Fort Myers. Once complete, the project will provide safe, resilient, and energy-efficient homes for low- to moderate-income households impacted by recent hurricanes.

Construction is actively underway at the site, with substantial progress visible across multiple buildings. Recent site observations confirmed that vertical construction has advanced beyond the foundational stage. Structural block walls are rising steadily, with several buildings already showing the second level formed. Stairwells and framing components are being set into place, and heavy equipment is mobilized across the property to support ongoing block installation and concrete work.

Scaffolding and construction crews are engaged throughout the site, with dumpsters, materials, and equipment present, reflecting an active and well-organized job site. The progress achieved to date demonstrates steady momentum as the project transitions from early structural assembly toward full framing and enclosure.



Figure 8. Construction progress



Figure 9. St Peter Claver Housing under construction

Regarding Expenditures: \$1,973,816.65 that had been drawn under activity 122MFH. Lee County has corrected the vouchers and assigned those charges to the correct activity DR10438, St Peter Claver Housing Phase II.

Section 3 Qualitative Efforts:

In parallel with construction, the County continues to monitor and ensure compliance with federal requirements, including the Davis-Bacon and Related Acts (DBRA), Section 3 hiring and labor hour goals, and all applicable environmental mitigation conditions identified during the project's review. These compliance efforts are integral to safeguarding both construction quality and long-term program accountability.

During the reporting period, the team at St. Peter provided Section 3 training to subcontractors and plan on continuing the trainings.

Summary of Efforts – St. Peter Caver II

Indicate the efforts made to direct the employment and other economic opportunities generated by HUD financial assistance for housing and community development programs, to the greatest extent feasible, toward low and very low-income persons, particularly those who are recipients of government assistance for housing. (Enter YES for all that apply and NO if it does not apply)	
NO	Outreach efforts to generate job applicants who are Public Housing Targeted workers
NO	Outreach efforts to generate job applicants who are other funding Targeted workers
NO	Direct on the job training (including apprenticeships)
NO	Indirect training such as arranging for, contracting for, or paying tuition for off-site training
NO	Technical assistance to help Section 3 workers compete for a job (e.g. resume assistance, coaching)
NO	Outreach efforts to identify and collect bids from Section 3 business concerns
NO	Technical assistance to help Section 3 business concerns understand and bid on contracts
NO	Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns
NO	Provided or connected Section 3 workers and Targeted workers with assistance in seeking employment including: drafting resumes, preparing for interviews and finding job interviews
NO	Held one or more job fairs
NO	Provided or connected Section 3 workers or Targeted workers with supportive services that can provide direct services or referrals
NO	Provided or connected Section 3 workers or Targeted workers with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms or entry level tests
NO	Assisted Section 3 workers or Targeted workers with finding childcare
NO	Assisted Section 3 workers or Targeted workers apply for/or attend community college or a four year educational institution
NO	Assisted Section 3 workers or Targeted workers to apply for or attend vocational/technical training
NO	Assisted Section 3 workers or Targeted workers to obtain financial literacy training and/or coaching
NO	Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns
NO	Provided or connected Section 3 workers or Targeted workers with training on computer use or online technologies
YES	Other: Please specify below
Ongoing Section 3 training is conducted regularly with subcontractors on site.	

Figure 10. Section 3 Efforts

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Section 3 Labor Hours	4804	4804/13750
# of Targeted Section 3 Laor	0	0/2750
# of Total Labor Hours	7097	7097/55000

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	0/72
# of Multifamily Units	0	0/72

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	0/72	0/72	0
# Renter	0	0	0	0/0	0/72	0/72	0

Activity Locations

1426 Sister Bowman Lane, Fort Myres, FL 33916

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents: None

Grantee Activity Number: DR10439
Activity Title: Oak Park Senior Living

Activity Type:

Construction of new housing

Activity Status:

Underway

Project Number:

22MFH

Project Title:

Multifamily Housing Rehab and Development

Projected Start Date:

03/25/2025

Projected End Date:

3/31/2027

Benefit Type:

Direct Benefit (Households)

Completed Activity Actual End Date:

National Objective:

Low/Mod-Income Housing

Responsible Organization:

Core Oak Park LLP

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$6,750,000.00
Total Budget	\$00.00	\$6,750,000.00
Total Obligated	\$6,750,000.00	\$6,750,000.00
Total Funds Drawdown	\$ 0.00	\$ 0.00
Program Funds Drawdown	\$ 0.00	\$ 0.00
Program Income Drawdown	\$ 0.00	\$ 0.00
Program Income Received	\$ 0.00	\$ 0.00
Total Funds Expended	\$ 0.00	\$ 0.00
Core Oak Park LLP	\$ 0.00	\$ 0.00
Most Impacted and Distressed Expended	\$ 0.00	\$ 0.00
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

The Oak Park Senior Living project, located at 3875 E. Michigan Avenue in Fort Myers, Florida, will provide 144 affordable housing units for families with incomes at or below 80% of the Area Median Income (AMI). This development addresses a critical need for quality, affordable housing in Lee County and represents a significant investment in the well-being and stability of local residents.

Designed with both comfort and functionality in mind, Oak Park will offer safe, modern living spaces complemented by essential on-site amenities. The project is thoughtfully planned to enhance the quality of life for its residents through features that promote safety, accessibility, and community engagement. By integrating common areas, recreational facilities, and landscaped open spaces, Oak Park fosters a welcoming environment where residents can build relationships and a sense of belonging.

Beyond housing, Oak Park is committed to holistic resident support. The development will provide access to social services aimed at promoting physical, emotional, and financial well-being. These services will support residents in maintaining independence, accessing community resources, and participating in programs that encourage healthy and connected living.

With a focus on sustainability and long-term viability, Oak Park Senior Living is a forward-looking response to the growing demand for senior housing in Fort Myers. It offers a vital solution that not only addresses the current shortage but also contributes to the development of a resilient, inclusive, and supportive community for years to come.

Location Description:

3875 E Michigan Ave
Fort Myers, FL 33905

Activity Progress Narrative:

During the reporting period, construction continued to progress steadily at Oak Park Senior Living, a multifamily development expanding affordable housing opportunities for seniors in Lee County. Significant milestones were achieved in vertical construction; however, periods of heavy rain caused minor schedule delays. The general contractor has implemented measures to recover lost time and maintain alignment with the overall construction timeline.

A recent site visit confirmed active construction across the site, with heavy equipment and materials mobilized and utility and drainage improvements advancing in parallel. Despite intermittent rain and muddy conditions, site access has been maintained, and work has continued efficiently.

Overall, Oak Park Senior Living continues to advance on schedule, with strong momentum toward completion of the building shell and preparation for interior mechanical, electrical, and plumbing installations in the upcoming quarter.



Figure 11. Oak Park construction progress.

Section 3 Qualitative Efforts:

- Outreach efforts to generate job applicants who are Public Housing Targeted Workers
- Other: Addendum for bidding documents including Section 3 requirement and Section 3 advertisement of employment opportunities related to the project in local newspaper.

The general contractor remains in close coordination with County staff to ensure full compliance with Davis-Bacon and Related Acts (DBRA), Section 3, and applicable environmental mitigation measures. Monthly progress meetings and routine field inspections are being conducted to monitor milestones and maintain quality standards.

Some of the Section 3 best quantitative efforts performed by the project's team include advertisement of the project's Section 3 opportunities in English and Spanish as well as creating an addendum in the bidding documents to include Section 3 requirement.

ADDENDUM #1
Oak Park Apartments
3885 E. Michigan Ave., Fort Myers, FL

MARMER CONSTRUCTION

Project Description:	- Construction Project to build: - New Multi-unit building consisting of 144 Units, Trash Enclosure, Maintenance Building, Porte Cochere, Pavilion, and BBQ Island - Unit Mix to include: 124 units- 1 Bed Apt 20 units- 2 Bed Apt
Plan Number:	202300604
Project Compliance:	- Davis Bacon Rules apply to this project, see Wage Determination Sheet - Section 3 Business and Employment Opportunities are available on this project, provide Section 3 Certificate with your proposal if this applies - WMBE Opportunities are available on this project, provide WMBE Certificate with your proposal if this applies Let us know if you are interested in learning more about these opportunities or have any compliance questions
Bid Due Date:	December 12, 2024, by 5PM
Addenda:	ADDENDUM #1 - Revised Civil plans dated 8.23.24 received - Revised Architectural Plans dated 10.30.24 for all building types received - Pricing to include Davis Bacon Requirements
Previous Addenda:	POST BID ADDENDUM #1 - Please see Narrative provided for SOW - Landscape sheets revised 8.24.24

Section 3, WMBE Business & Employment Opportunities
Marmar Construction, Inc has been contracted to build Oak Park Apartments 3885 E. Michigan Ave., Fort Myers, FL 33905
Section 3, WMBE Business & Employment Opportunities
Contact [REDACTED] for more details

Sección 3, WMBE Oportunidades de Negocios y Empleo
Póngase en contacto con [REDACTED] para más detalles

Email: info@[REDACTED].com
Office: [REDACTED] ext. [REDACTED]
May 4,11,18,25 2025
LSAR0271699

Figure 12. Oak Park Section 3 efforts

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Elevated Structures	0	0/1
# of Section 3 Labor Hours	8909	10347/21000
# of Targeted Section 3 Laor	0	0/4200
# of Total Labor Hours	12118	14561/84000

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	0/144
# of Multifamily Units	0	0/144

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	0/144	0/144	0
# Renter	0	0	0	0/0	0/144	0/144	0

Activity Locations

3875 E Michigan Ave Fort Myers, FL 33905

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Grantee Activity Number: DR10440

Activity Title: Ekos on Evans

Activity Type:

Construction of new housing

Activity Status:

Underway

Project Number:

22MFH

Project Title:

Multifamily Housing Rehab and Development

Projected Start Date:

05/22/2025

Projected End Date:

5/22/2027

Benefit Type:

Direct Benefit (Households)

Completed Activity Actual End Date:

National Objective:

Low/Mod-Income Housing

Responsible Organization:

MHP Lee I, LLC

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$ 0.00	\$17,000,000.00
Total Budget	\$ 0.00	\$17,000,000.00
Total Obligated	\$ 0.00	\$17,000,000.00
Total Funds Drawdown	\$4,496,682.42	\$4,496,682.42
Program Funds Drawdown	\$4,496,682.42	\$4,496,682.42
Program Income Drawdown	\$ 0.00	\$ 0.00
Program Income Received	\$ 0.00	\$ 0.00
Total Funds Expended	\$4,496,682.42	\$4,496,682.42
MHP Lee I, LLC	\$4,496,682.42	\$4,496,682.42
Most Impacted and Distressed Expended	\$4,496,682.42	\$4,496,682.42
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Ekos on Evans is a thoughtfully planned affordable housing development located at 3501 Evans Avenue, Fort Myers, Florida 33901. Spanning 9.1 acres of previously vacant land, the project will bring 144 high-quality

rental units to families in need of affordable housing options within the City of Fort Myers.

The project is well-advanced in its development phase, with 100% of construction documents completed and the full permitting package submitted to the City of Fort Myers for approval. The community has been designed to offer both functionality and livability, consisting of five residential buildings and a stand-alone clubhouse. There are two types of residential buildings in the development, both designed as three-story walk-ups. The buildings will contain either 24 or 36 units, creating a mix of unit types and layouts to serve a diverse population of residents. The clubhouse will serve as the heart of the community, housing the leasing office, clubroom, activity room, fitness center, and mailroom. A covered porch at the rear of the clubhouse opens out onto a swimming pool, offering residents a space for recreation and relaxation.

Beyond the pool, the site is further enhanced by community-oriented outdoor amenities including a grill island, playground/tot-lot, and dog park—all designed to foster a sense of connection and well-being among residents. Inside each unit, the development will feature modern, durable finishes, including solid surface countertops, plywood cabinetry, and luxury vinyl tile flooring. Every apartment will come equipped with full-size Energy Star appliances, including a range, refrigerator, and dishwasher, as well as a microwave and garbage disposal, providing residents with both comfort and energy efficiency.

Ekos on Evans represents a significant investment in the local community and a critical step forward in addressing the growing demand for high-quality, affordable family housing in Fort Myers.

Location Description:

3501 Evans Avenue
Fort Myers, FL 33901

Activity Progress Narrative:

During the reporting period, construction at Ekos on Evans continued to advance steadily. Site work and foundation activities have been largely completed across multiple building pads, and vertical construction is now well underway on the first residential building. Concrete masonry walls are being erected, and structural framing materials have been delivered and staged on site.

Utility and drainage infrastructure installation continues in coordination with ongoing grading and site preparation activities. The contractor, DeAngelis Diamond Construction, has mobilized a consistent workforce on site, with active crews performing underground plumbing, electrical, and concrete work. Construction trailers and material laydown areas are organized for efficient project operations, and site safety protocols remain in place.

Recent aerial photos show visible progress across the site, including defined building footprints, foundation completion for several buildings, and active vertical construction on Building 1. Despite intermittent weather delays earlier in the quarter, work remains on schedule, with continued momentum toward completing additional vertical structures in the coming months.



Figure 13. Aerial view of site work progress.

Section 3 Compliance and Outreach:

During the reporting period, the project's general contractor, DeAngelis Diamond Construction, continued to demonstrate active efforts toward Section 3 compliance and outreach. DeAngelis has been consistently soliciting employment opportunities through social media platforms, including LinkedIn and Facebook, to attract Section 3-qualified applicants; however, no responses have been received to date.

Section 3 requirements and related efforts remain a standing topic during weekly jobsite safety and scheduling meetings, which were moved from Tuesdays at 8:30 a.m. to Tuesdays at 1:30 p.m. to allow broader subcontractor participation. DeAngelis is also in the process of developing formal training materials for subcontractors to help identify and document Section 3 workers among their existing workforce.

Although there has been no walk-in traffic from local residents seeking employment during this reporting period, DeAngelis continues to engage its subcontractors through ongoing discussions on how to increase Section 3 awareness and participation. One new subcontract was awarded this quarter for final cleaning services to a Section 3-certified firm, reflecting continued best efforts to direct contracting opportunities to qualified businesses.

DeAngelis also reported that one previously awarded subcontract to a Section 3 business had to be rescinded due to failure to meet insurance requirements. A replacement subcontract is currently being competitively bid, with Section 3 eligibility remaining a priority consideration in the final selection.

As of this quarter, approximately three to four subcontractors remain active onsite from the prior reporting period (Q2), with ongoing coordination efforts to promote Section 3 participation and maintain compliance with HUD's requirements.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Section 3 Labor Hours	0	0/37500
# of Targeted Section 3 Laor	0	0/7500
# of Total Labor Hours	8378	8378/150000

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	0/144
# of Multifamily Units	0	0/144

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	0/144	0/144	0
# Renter	0	0	0	0/0	0/144	0/144	0

Activity Locations

3501 Evans Ave, Fort Myers, FL 33901

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Project # / 22RL / Individual Housing Rehabilitation, Reconstruction and Elevation**Grantee Activity Number: 122RL****Activity Title: HRRE - Activity Delivery****Activity Type:**

Rehabilitation/reconstruction of residential structures

Activity Status:

Under Way

Project Number:

22R

Project Title:Individual Housing Rehabilitation,
Reconstruction,**Projected Start Date:**

10/01/2023

Projected End Date:

09/30/2029

Benefit Type:

N/A

Completed Activity Actual End Date:**National Objective:**

Low/Mod-Income Housing

Responsible Organization:

Lee County, FL

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$22,750,000.00
Total Budget	\$0.00	\$22,750,000.00
Total Obligated	\$0.00	\$22,750,000.00
Total Funds Drawdown	\$718,976.54	\$11,560,417.11
Program Funds Drawdown	\$718,976.54	\$11,560,417.11
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$718,976.54	\$11,560,417.11
Lee County, FL	\$718,976.54	\$11,560,417.11
Most Impacted and Distressed Expended	\$718,976.54	\$11,560,417.11
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Activity Delivery Costs for HRRE

Location Description:

Activities undertaken within Lee County, FL.

Activity Progress Narrative:

During this reporting period, Lee County utilized activity delivery funding for Housing Rehabilitation, Reconstruction, and Elevation, including the following costs:

- Maintaining activity specific policies and procedures
- Processing applications for assistance
- Project specific environmental reviews
- Activity specific construction oversight
- Activity specific legal services (drafting contracts)
- Activity specific staff and contracted services

Beneficiaries Performance Measures

See Activity 22R for outcome and beneficiary data.

Activity Locations

Activity Delivery Costs for Housing Rehabilitation, Reconstruction and Elevation Activities. See activities 22R for outcome and beneficiary data.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Grantee Activity Number: 22RL**Activity Title: Housing Rehabilitation, Reconstruction and Elevation****Activity Type:**

Rehabilitation/reconstruction of residential structures

Activity Status:

Under Way

Project Number:

22R

Project Title:

Individual Housing Rehabilitation, Reconstruction,

Projected Start Date:

02/01/2024

Projected End Date:

01/20/2029

Benefit Type:

Direct Benefit Households

Completed Activity Actual End Date:**National Objective:**

Low/Mod-Income Housing

Responsible Organization:

Lee County, FL

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$152,250,000.00
Total Budget	\$0.00	\$152,250,000.00
Total Obligated	\$0.00	\$152,250,000.00
Total Funds Drawdown	\$18,964,719.48	\$34,180,381.38
Program Funds Drawdown	\$18,964,719.48	\$34,180,381.38
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$18,964,719.48	\$34,180,381.38
Lee County, FL	\$18,964,719.48	\$34,180,381.38
Most Impacted and Distressed Expended	\$18,964,719.48	\$34,180,381.38
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Housing rehabilitation, reconstruction, and elevation for low- and moderate-income households impacted by Hurricane Ian. Activity to be undertaken in Lee County, FL.

Location Description:

Activities undertaken in Lee County, FL.

Activity Progress Narrative:

During the reporting period, the Housing Rehabilitation, Reconstruction, and Elevation (HRRE) Program achieved significant progress. To date, construction has been completed on 267 homes, including 73 finalized this quarter. An additional 83 homes remained under active construction at the close of the quarter.

Of the 73 assisted homes, most were reconstructions for a total of 60 reconstructions and 13 were rehabilitated homes.

Assisted households are geographically dispersed across Bokeelia, Bonita Springs, Cape Coral, Fort Myers, Fort Myers Beach, Lehigh Acres, North Fort Myers, Saint James City, and Sanibel. Importantly, none of the completed or in-progress homes are located within a designated flood hazard area.

The General Contractors really worked in achieving the Section 3 benchmarks, falling slightly under the required Targeted Section 3 benchmark of 5%:

- Total Labor Hours: 8,594
- Section 3 Labor Hours: 6,532 (76%)
- Targeted Section 3 Labor Hours: 385 (4%)

The General Contractors demonstrated good faith and best efforts in meeting Section 3 obligations, and several examples of their outreach and hiring practices are provided below.

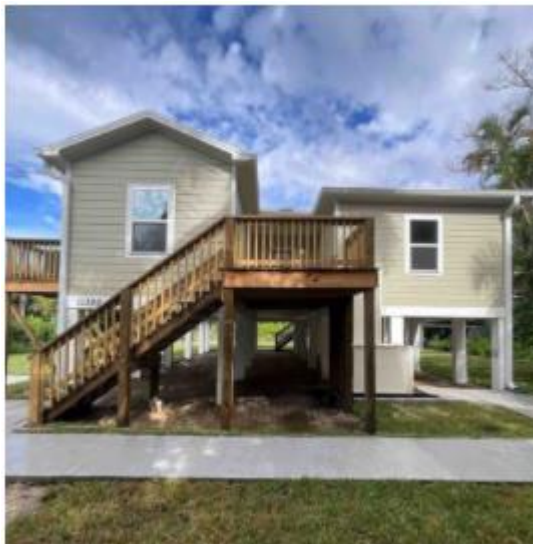




Figure 14. LeeCares Reconstruction

Section 3 Qualitative Efforts

- Outreach efforts to generate job applicants who are Public Housing Targeted Workers
- Outreach efforts to generate job applicants who are Other Funding Targeted Workers
- Outreach efforts to identify and secure bids from Section 3 business concerns
- Other

Posted advertisement of Section 3 opportunities at the construction site.





**PRIORITY HIRING OPPORTUNITIES FOR
EMPLOYEES, TRAINING, AND
SUBCONTRACTORS
THAT QUALIFY FOR
HUD SECTION 3**

HUD SECTION 3 PRIORITIZES HIRING TO
INDIVIDUALS AND BUSINESSES THAT ARE
LOCAL AND CONSIDERED **LOW AND
VERY LOW INCOME** BASED ON THE
MEDIAN INCOME OF THE AREA.

IF YOU MEET THESE REQUIREMENTS,
PLEASE SEND
YOUR INTEREST TO
[REDACTED]@[REDACTED].COM

Figure 15. Section 3 Efforts

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Elevated Structures	48	73/312
# of Properties	73	266/800
# of Section 3 Labor Hours	4568	11089/700,000
# of Substantially Rehabilitated	0	39/0
# of Targeted Section 3 Labor	0	149/140,000
# of Total Labor Hours	20715	59763/2,800,000

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	73	266/800
# of Multifamily Units	0	0/0
# of Single family Units	73	266/800

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	59	14	73	216/552	50/128	266/800	100%
# Owner	59	14	73	216/541	49/125	265/784	100%
# Renter	0	0	0	0/11	1/3	1/16	100%

Activity Locations

Activities undertaken within Lee County, FL.

Individual Housing Project records are exempt per Florida Statute Section 119.071(5)(f)1.b

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Project # / 22SFH / Single Family Housing Development**Grantee Activity Number: 122SFHL****Activity Title: Single Family Housing Development - Activity Delivery****Activity Type:**

Construction of new housing

Activity Status:

Under Way

Project Number:

22SFH

Project Title:

Single Family Housing Development

Projected Start Date:

10/01/2023

Projected End Date:

09/30/2029

Benefit Type:

N/A

Completed Activity Actual End Date:**National Objective:**

Low/Mod-Income Housing

Responsible Organization:

Lee County, FL

Grantee Program:

22 Housing

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$5,000,000.00
Total Budget	\$0.00	\$5,000,000.00
Total Obligated	\$0.00	\$5,000,000.00
Total Funds Drawdown	\$140,176.78	\$583,172.65
Program Funds Drawdown	\$140,176.78	\$583,172.65
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$140,176.78	\$583,172.65
Lee County, FL	\$140,176.78	\$583,172.65
Most Impacted and Distressed Expended	\$140,176.78	\$583,172.65
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Activity Delivery for Single Family Housing Development

Location Description:

Activity Delivery of Single Family Housing Development Activities - See Activities 22SFH for outcome and beneficiary data

Activity Progress Narrative:

During this reporting period, Lee County utilized activity delivery funding for Single Family Housing Development. Activities associated with draws completed for this activity include the following types of costs:

- Maintaining activity specific policies and procedures
- Training on monitoring and compliance for Subrecipients/Developers
- Processing of underwriting, risk assessments and preparation of developer/subrecipient agreements
- Project specific Environmental Reviews
- Activity specific staff and contracted services
- Activity specific legal services (drafting contracts)

Beneficiaries Performance Measures

Accomplishments related to these costs will be reflected in DRGR upon execution of written agreements for specific development activities.

Activity Locations

Activities undertaken within Lee County, FL.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:	None
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Project # / 23PS / Public Services**Grantee Activity Number: 123PSL****Activity Title: Public Services - Activity Delivery****Activity Type:**
Public Services**Activity Status:**
Under Way**Project Number:**
23PS**Project Title:**
Public Services**Projected Start Date:**
10/01/2023**Projected End Date:**
09/30/2029**Benefit Type:**
N/A**Completed Activity Actual End Date:****National Objective:**
Low/Mod**Responsible Organization:**
Lee County, FL**Grantee Program:**
23 Public Services

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$1,500,000.00
Total Budget	\$0.00	\$1,500,000.00
Total Obligated	\$0.00	\$1,500,000.00
Total Funds Drawdown	\$73,166.56	\$273,526.57
Program Funds Drawdown	\$73,166.56	\$273,526.57
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$73,166.56	\$273,526.57
Lee County, FL	\$73,166.56	\$273,526.57
Most Impacted and Distressed Expended	\$73,166.56	\$273,526.57
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Activity delivery for public service activities. See activities 23PS for outcome and beneficiary data.

Location Description:

Activity delivery costs for Public Services Activities undertaken within Lee County.

Activity Progress Narrative:

During this reporting period, Lee County utilized activity delivery funding for Public Service activities, including the following:

- Maintaining activity specific policies and procedures
- Activity specific staff and contracted services

Regarding Expenditures: Previously \$348,129.26 had been drawn under activity 123PSL. We have corrected the vouchers and assigned those charges to the correct activity DR10189.

Beneficiaries Performance Measures

Accomplishments related to these costs will be reflected in DRGR upon execution of written agreements for specific public service activities.

Activity Locations

Activity undertaken in Lee County, FL.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Activity Supporting Documents:	None
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Grantee Activity Number: DR10189**Activity Title: Lee County Unmet Need Long-Term Recovery Group****Activity Type:**

Public service

Activity Status:

Under Way

Project Number:

23PS

Project Title:

Public Services

Projected Start Date:

06/01/2024

Projected End Date:

05/31/2025

Benefit Type:

N/A

Completed Activity Actual End Date:**National Objective:**

Low/Mod

Responsible Organization:

Catholic Charities, Diocese of Venice, Inc.

Grantee Program

23 Public Services

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$2,333,333.33
Total Budget	\$0.00	\$2,333,333.33
Total Obligated	\$0.00	\$2,333,333.33
Total Funds Drawdown	\$69,912.44	\$756,475.63
Program Funds Drawdown	\$69,912.44	\$756,475.63
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$69,912.44	\$756,475.63
Catholic Charities, Diocese of Venice, Inc	\$69,912.44	\$756,475.63
Most Impacted and Distressed Expended	\$69,912.44	\$756,475.63
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

The Unmet Needs Long Term Recovery Group is aiding CDBG-DR storm recovery by: compiling and promoting information related to housing recovery services; supporting service providers and case managers to assess the needs of displaced persons; identifying available resources; analyzing and providing recovery service information to impacted households; identifying gaps in services; and advocating for timely resolutions to evolving issues for those with disaster-caused or disaster aggravated housing needs.

Location Description:

Lee County, FL

Activity Progress Narrative:

During this reporting period subrecipient, Catholic Charities, continued to administer the County's microgrant program to close critical recovery gaps for disaster-impacted households. The program was structured to complement CDBG-DR by addressing needs not met through FEMA, SBA, insurance, or other federal programs. By stabilizing families quickly, the microgrants prevented displacement and preserved safe, sanitary, and secure living conditions. These investments provided both immediate relief and a strategic bridge to longer-term CDBG-DR activities, ensuring that federal and local recovery funds were maximized and that vulnerable populations, particularly those not eligible for other assistance, received timely support.

The microgrant program was structured to complement CDBG-DR by addressing needs not met through FEMA, SBA, insurance, or other federal programs. Eight micro grantees have drawn down funds in quarter and Catholic Charities is in the process of collecting and review the households assisted and beneficiary data.

Accomplishments Performance Measures

No Accomplishments Performance Measures.

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of cases closed	0			0/0	/150	0/150	0
# of cases opened	0			0/0	/150	0/150	0

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0			0/0	/150	/150	0

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Project # / 24CI / Critical Public Facilities and Infrastructure**Grantee Activity Number: 124CIU****Activity Title: Critical Infrastructure Activity Delivery****Activity Type:**

Rehabilitation/reconstruction of other non-residential

Activity Status:

Under Way

Project Number:

24CI

Project Title:

Critical Public Facilities and Infrastructure

Projected Start Date:

10/01/2023

Projected End Date:

09/30/2029

Benefit Type:

N/A

Completed Activity Actual End Date:**National Objective:**

Urgent Need

Responsible Organization:

Lee County, FL

Grantee Program:

24 Public Facilities and Infrastructure

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$6,800,000.00
Total Budget	\$0.00	\$6,800,000.00
Total Obligated	\$0.00	\$6,800,000.00
Total Funds Drawdown	\$390,110.25	\$1,748,032.02
Program Funds Drawdown	\$390,110.25	\$1,748,032.02
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$390,110.25	\$1,748,032.02
Lee County, FL	\$390,110.25	\$1,748,032.02
Most Impacted and Distressed Expended	\$390,110.25	\$1,748,032.02
Other Funds	\$ 0.00	\$ 0.00
Match Funds	\$ 0.00	\$ 0.00
Non-Match Funds	\$ 0.00	\$ 0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Activity Delivery costs for critical infrastructure and public facilities activities. See activities 24CI for outcome and beneficiary data.

Location Description:

Activity delivery for critical infrastructure and public facilities projects undertaken within Lee County.

Activity Progress Narrative:

During this reporting period, Lee County utilized activity delivery funding for Critical Infrastructure including the following types of costs:

- Maintaining activity specific policies and procedures
- Training on monitoring and compliance for Subrecipients
- Processing of underwriting, risk assessments and preparation of MOA and subrecipient agreements
- Project specific Environmental Reviews
- Activity specific staff and contracted services
- Activity specific legal services (drafting contracts)

The total budget for activity delivery costs was reduced based on projections of expenditures to date and anticipated expenditures for the remainder of the grant term.

Regarding Budget: Lee County will utilize two activities to report activity delivery costs for infrastructure based on the national objective, 124CIL for Low/Mod and 124CIU for Urgent Need. \$3,200,000 was moved from the 124CIU budget and added to the 124CIL budget.

Beneficiaries Performance Measures

Accomplishments related to these costs will be reflected in DRGR upon execution of written agreements for specific critical infrastructure activities.

Activity Locations

Activities undertaken in Lee County, FL.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:	None
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Grantee Activity Number: DR10250**Activity Title: Ragsdale/Pennsylvania/Arroyal Corridor Street Improvements****Activity Type:**

Construction/reconstruction of streets

Activity Status:

Under Way

Project Number:

24CI

Project Title:

Critical Public Facilities and Infrastructure

Projected Start Date:

01/01/2025

Projected End Date:

12/31/2028

Benefit Type:

N/A

Completed Activity Actual End Date:**National Objective:**

Urgent Need

Responsible Organization:

City of Bonita Springs, FL

Grantee Program:

24 Public Facilities and Infrastructure

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$21,000,000.00
Total Budget	\$0.00	\$21,000,000.00
Total Obligated	\$0.00	\$21,000,000.00
Total Funds Drawdown	\$781.40	\$781.40
Program Funds Drawdown	\$781.40	\$781.40
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$781.40	\$781.40
City of Bonita Springs	\$781.40	\$781.40
Most Impacted and Distressed Expended	\$781.40	\$781.40
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Improvements to stormwater, water and wastewater, multi-use pathways and acquisition of additional right of way to accommodate the proposed improvements as needed.

Location Description:

Ragsdale Street, Pennsylvania Ave, and Arroyal Road; Bonita Springs, Lee County, Florida 34135. The project area is an east west corridor that is bound on the east at the intersection of Matheson Ave and Ragsdale Street and on the west by the intersection of Arroyal Road and Bonita Beach Road.

Activity Progress Narrative:

During this reporting period the City of Bonita Springs selected vendor Kimley-Horn for design and they worked on the scope and fee for the design contract. The contract is set to go to the City Council for approval on October 1.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Linear miles of Public	0	0/2
# of Section 3 Labor Hours	0	0/3500
# of Targeted Section 3 Labor	0	0/175
# of Total Labor Hours	0	0/14000

Beneficiary Performance Measures

No Beneficiary Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Grantee Activity Number: DR10257
Activity Title: Sanibel Fire Station 171

Activity Type:
 Rehabilitation/ reconstruction of public facilities

Activity Status:
 Under Way

Project Number:
 24CI

Project Title:
 Critical Public Facilities and Infrastructure

Projected Start Date:
 01/01/2025

Projected End Date:
 12/31/2027

Benefit Type:
 N/A

Completed Activity Actual End Date:

National Objective:
 Urgent Need

Responsible Organization:
 City of Sanibel, FL

Grantee Program:
 24 Public Facilities and Infrastructure

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$0.00	\$9,124,388.24
Total Budget	\$0.00	\$9,124,388.24
Total Obligated	\$0.00	\$9,124,388.24
Total Funds Drawdown	\$20,088.40	\$20,088.40
Program Funds Drawdown	\$20,088.40	\$20,088.40
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$20,088.40	\$20,088.40
City of Sanibel	\$20,088.40	\$20,088.40
Most Impacted and Distressed Expended	\$20,088.40	\$20,088.40
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Reconstruction of Fire Station 171. The current bay area and roof will remain unchanged, and the living areas of the station will be demolished and reconstructed.

Location Description:

2351 Palm Ridge Rd, Sanibel, FL 33957

Activity Progress Narrative:

During this reporting period the environmental review was completed and the Authority to Use Grant Fund was received from HUD. The preliminary design is at 60% completion.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Elevated Structures	0	0/1
# of Public Facilities	0	0/1
# of Section 3 Labor Hours	0	0/3500
# of Targeted Section 3 Labor	0	0/175
# of Total Labor Hours	0	0/14000

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None

Grantee Activity Number: DR10260
Activity Title: Shelter Hardening

Activity Type:
 Rehabilitation/ reconstruction of public facilities

Activity Status:
 Under Way

Project Number:
 24CI

Project Title:
 Critical Public Facilities and Infrastructure

Projected Start Date:
 05/20/2025

Projected End Date:
 12/30/2028

Benefit Type:
 N/A

Completed Activity Actual End Date:

National Objective:
 Urgent Need

Responsible Organization:
 Lee County School Board

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$8,000,000.00	\$8,000,000.00
Total Budget	\$8,000,000.00	\$8,000,000.00
Total Obligated	\$8,000,000.00	\$8,000,000.00
Total Funds Drawdown	\$0.00	\$0.00
Program Funds Drawdown	\$0.00	\$0.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$0.00
City of Sanibel	\$0.00	\$0.00
Most Impacted and Distressed Expended	\$0.00	\$0.00
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

Lee County does not have enough shelters to properly support residents. As such, the School District of Lee

County (SDLC) has determined that it is imperative to harden two shelter schools, East Lee County High School and Ray V. Pottorf Elementary School, to better protect them against future storms and make them more resilient for emergency sheltering. Both campuses experienced water intrusion through the windows, doors, and roofs during Hurricane Ian, highlighting the need for these upgrades. The hardening efforts will focus on upgrading the building envelope to withstand a Category 5 hurricane and comply with the most recent Florida Building Code (FBC) standards. As evidenced by the impact of Hurricane Ian on the facilities identified above there is an urgent need to harden East Lee County High School and Ray V. Pottorf Elementary School to alleviate existing conditions that pose a serious and immediate threat to the health and welfare of the community.

Location Description:

East Lee County High School: 715 Thomas Sherwin Avenue, Lehigh Acres, Florida 33974
Ray V. Pottorf Elementary School: 4600 Challenger Boulevard, Fort Myers, Florida 33966

Activity Progress Narrative:

During this reporting period the School District team worked on the design scope.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Public Facilities	0	0/2
# of Section 3 Labor Hours	0	0/1040
# of Targeted Section 3 Labor	0	0/208
# of Total Labor Hours	0	0/4160

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents: None

Grantee Activity Number: DR10503
Activity Title: LARC

Activity Type:
 Rehabilitation/ reconstruction of public facilities

Activity Status:
 Under Way

Project Number:
 24CI

Project Title:
 Critical Public Facilities and Infrastructure

Projected Start Date:
 06/01//2025

Projected End Date:
 12/30/2028

Benefit Type:
 N/A

Completed Activity Actual End Date:

National Objective:
 Urgent Need

Responsible Organization:
 City of Fort Myers

Overall	July 1 thru Sept 30, 2025	To Date
Total Projected Budget from All Sources	\$5,704,948.00	\$5,704,948.00
Total Budget	\$5,704,948.00	\$5,704,948.00
Total Obligated	\$5,704,948.00	\$5,704,948.00
Total Funds Drawdown	\$0.00	\$0.00
Program Funds Drawdown	\$0.00	\$0.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$0.00
Matlacha Pine Island Fire Control District	\$0.00	\$0.00
Most Impacted and Distressed Expended	\$0.00	\$0.00
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00
Other Funds:		
Overall	This Period	To Date
Match Funds	\$ 0.00	\$ 0.00

Activity Description:

The LARC project will enhance the resilience, accessibility, and service capacity of LARC's main campus in Lee County, Florida by construction new facilities and hardening existing infrastructure. The project includes the construction of a new residential group home on the LARC campus, replacing the one lost during Hurricane Ian. This will be a 6-bedroom, approx. 4,000 square foot, fully ADA compliant home designed to provide a safe, comfortable, and accessible living space for individuals with IDD. This new home will support the continued care of individuals with higher needs, ensuring they have a safe and secure environment in which to live. The project also includes construction of a new facility for adult day training which will be hardened to be more disaster resilient. The building will feature appropriate infrastructure to support the day-to-day needs of participants. A generator will be added to an existing building, which houses LARC's commercial culinary kitchen, enabling LARC to continue operating the kitchen during disaster recovery. An outdoor initiative will make improvements for both beautification and accessibility.

Location Description:

2570 Hanson Street Fort Myers, FL 33901

Activity Progress Narrative:

During this reporting period the environmental review was completed and the Authority to Use Grant Funds was received from HUD. Additionally the subrecipient agreement was executed.

.Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of public facilities	0	0/2
# of Section 3 Labor Hours	0	0/5040
# of Targeted Section 3 Labor	0	0/252
# of Total Labor Hours	0	0/20160

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources

No Other Funding Sources

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources

Activity Supporting Documents:

None