



# MARION COUNTY COMMUNITY SERVICES

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**OPERATIONAL PLAN  
PROJECT FISCAL YEARS (2022-2026)**

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## Executive Summary

The Five Year Operational Plan for the Community Services Department provides a thorough outline for future administration and management of the department. The mission of the Community Services Department is to effectively manage and implement public programs to ensure available resources that improve and enhance the quality of life for Marion County residents. To meet these needs, the department provides programs that address housing, community development, homelessness, and health and human services which may include: acquisition of housing, new construction, infrastructure, and purchase assistance for first-time home buyers and non-ad valorem tax assistance.

Reorganized in 2021, Community Services consists of four (4) divisions with a total FTE of 13, with additional support provided by two (2) temporary employees. The Community Development Division focuses mainly on acquisition, construction, reconstruction, rehabilitation and installation of public facilities, and infrastructure improvements. The Housing Division focuses on increasing affordable housing. The Homelessness Division works in conjunction with the City of Ocala through the Ocala/Marion Joint-Office on Homelessness FL-514 to provide emergency shelter, outreach, homeless prevention, rapid rehousing, and case management to the homeless population. The Health and Human Services Division manages state-mandated health and human service programs [i.e., Health Care Responsibility Act (HCRA), We Care, and Low-Income Non Ad-Valorem Tax Assistance (LINATA), Unclaimed Decedent Program (Unclaimed)] and contracts with a local service provider for the disposition of unclaimed decedents in Marion County.

During the economic recession and COVID pandemic, the demand for direct services for citizens dramatically increased. As a result, the Community Services Department experienced a 104% increase in production. As local economic conditions improve, Community Services strives to meet community needs by providing the programs and staffing to maintain a high level of customer service. The Operational Plan provides a comprehensive review of existing programs, staffing levels, regulatory requirements, and other topics relevant to the grants and associated eligible activities. An analysis was conducted on strengths, weaknesses, and opportunities for improvement. Specific areas analyzed include: goal alignment, staffing levels, education and training, process improvement, and reporting. The overall strategic direction for the department in the next five years is defined in four goals: 1) maintain professionalism; 2) increase accountability; 3) enhance transparency; and 4) improve structure.

## Current State

### What is Community Services “WHY”?

We provide opportunities to individuals and families to improve their quality of life by providing housing opportunities, services to the homeless population, and other improvements to benefit a public need.



Marion County Hospital District - Beacon Point Rehabilitation

### What We Do

As an entitlement community, Marion County receives and administers federal and state funding through Community Services. The department distributes funds to local non-profit agencies, developers, and individual citizens through program divisions as follows:

- Community Development
- Housing
- Homelessness
- Health and Human Services



Transitions Life Center Pavilion

## Community Services Divisions

### Community Development.

Eligible activities are defined by the U.S. Department of Housing and Urban Development (HUD) as acquisition, construction, reconstruction, rehabilitation and installation of public facilities and infrastructure improvements. The division's priorities include infrastructure, public facility, public service, and economic development.

### Housing.

Affordable housing is defined as housing in which the occupant is paying no more than 30 percent (30%) of gross income for housing costs including utilities. Community Services' affordable housing program focuses on increasing opportunities near employment and transportation centers, rental properties, and permanent supportive rental housing to include wrap around services. The Florida Office of Economic and Demographic Research released a 2020 census report stating that Marion County's housing count showed 88% of available housing as occupied, with a mere 12% vacant. **An even smaller percentage of available homes qualify as affordable housing.**

### Homelessness.

On May 19, 2020, Community Services expanded its responsibilities by assuming the role of Collaborative Applicant for the Continuum of Care as the administrative lead of the Ocala/Marion County Joint-Office on Homelessness FL-514, in partnership with the City of Ocala. The Continuum of Care was established by HUD and recognized by the Department of Children and Families (DCF). **Funding is not entitlement but by competitive application.**

### Health and Human Services.

Community Services also manages state-mandated health and human service programs, contracts with local service providers, and provides non-ad valorem tax assistance.

# Organizational Chart



## Funding Sources by Division

	COMMUNITY DEVELOPMENT	HOUSING	HOMELESS	HEALTH & HUMAN SERVICES
NON AD VALOREM				X
HCRA				X
UNCLAIMED DECEDENTS				X
CDBG	X	X	X	
HOME	X	X	X	
HOME ARPA		X	X	
COUNTY ARPA	X	X	X	
ESG		X	X	
SHIP		X	X	
NSP1 & NSP3		X		
COC			X	
COC ESG		X	X	
CHALLENGE			X	
TANF			X	

Health and Human Services.

GENERAL REVENUE FUNDS		
LINATA	HCRA	UNCLAIMED
\$20,000.00	\$250,000.00	\$48,000.00



## COMMUNITY SERVICES GRANTS

PROGRAM	ESG	SHIP	HOME / *HOME ARPA	NSP	CDBG	ARPA GRANT	ARPA
<u>DESCRIPTION</u>	<u>Rapid Rehousing/ Permanent Housing/Shelter</u>	<u>Purchase Assistance/ Rental / Rehab/New Construction</u>	<u>Purchase Assistance/ Rental/ Rehab/New Construction/CHDO Homelessness*</u>	<u>Housing assistance for foreclosed properties</u>	<u>Public Facilities/ Services/ Infrastructure/ Housing Rehab/Economic Development/ Neighborhood Target area</u>	<u>Mitigation COVID Pandemic Response</u>	<u>Mitigation Housing COVID Response</u>
<u>FUNDING SOURCE</u>	<u>HUD</u>	<u>Florida Housing Finance Corporation</u>	<u>HUD</u>	<u>HUD</u>	<u>HUD</u>	<u>Treasury</u>	<u>Treasury</u>
<u>Grant / Loan</u>	<u>Grant</u>	<u>Loan</u>	<u>Loan</u>	<u>Loan</u>	<u>Grant/Loan</u>	<u>Grant</u>	<u>Grant/Loan</u>
<u>MAX INCOME</u>	<u>30% AMI Literally Homeless</u>	<u>80%</u>	<u>80% AMI</u>	<u>80% AMI</u>	<u>80% AMI</u>	<u>Non-profits</u>	<u>140% AMI</u>
<u>SPECIAL CONDITIONS</u>	<u>7.5% Admin Two Years to Expend</u>	<u>20% Special Needs 30% Very Low 30% Low 65% Construction 75% Homeownership 15% Rental 10% Admin Three Years to Expend</u>	<u>15% CHDO 10% Admin Five Years to Expend *5% Admin</u>	<u>25% must meet 50% AMI 10% Admin Program Income Only Option to convert to CDBG</u>	<u>51% Low- Mod income 15% Public Service 20% Admin Eight Years to Expend</u>	<u>Technical Assistance for Non-Profits Serving Rural Communities</u>	<u>0-1% loan Affordable Housing Increase Supply and Quality</u>
<u>ANNUAL ALLOCATION</u>	<u>\$168,937</u>	<u>\$2,027,820</u>	<u>\$887,773 *\$3,217,585</u>	<u>\$2.1 Million (PI)</u>	<u>\$2,041,257</u>	<u>\$2,000,000</u>	<u>\$2,000,000</u>

## CONTINUUM OF CARE GRANTS

<u>PROGRAM</u>	<u>HUD PLANNING</u>	<u>DCF STAFFING</u>	<u>CHALLENGE</u>	<u>ESG</u>	<u>TANF</u>
<u>DESCRIPTION</u>	<u>Administration &amp; Operations (direct awards to providers for PSH and RRH)</u>	<u>Administration &amp; Operations</u>		<u>Rapid Rehousing/ Permanent Housing/Shelter</u>	<u>Financial Assistance</u>
<u>FUNDING SOURCE</u>	<u>U.S. Department of Housing and Urban Development</u>	<u>DCF</u>	<u>DCF</u>	<u>DCF</u>	<u>DCF</u>
<u>Grant / Loan</u>	<u>Grant</u>	<u>Grant</u>	<u>Grant</u>	<u>Grant</u>	<u>Grant</u>
<u>MAX INCOME</u>	<u>N/A</u>	<u>N/A</u>	<u>30% AMI</u>	<u>30% AMI</u>	<u>30% AMI</u>
<u>SPECIAL CONDITIONS</u>	<u>Admin One Year to Expend</u>	<u>Admin One Year to Expend</u>	<u>30% AMI or literally homeless Passed on to providers of direct services One Year to Expend</u>	<u>30% AMI or literally homeless ESG requires 100% match; ESG requires participation with coordinated entry and HMIS 5% Admin Two Years to Expend</u>	<u>30% AMI or literally homeless Passed on to providers of direct services One Year to Expend</u>
<u>ANNUAL ALLOCATION</u>	<u>\$51,004</u>	<u>\$107,143</u>	<u>\$86,000</u>	<u>\$172,000</u>	<u>\$38,000</u>

## Current Primary Workload

Presently, Community Services has 13 full-time positions and 2 temporary positions for its four divisions. Staffing levels have been reduced in the past three (3) years due to retirement.

### Program Administration.

Community Services performs an annual review of grant applications, drafts contracts in conjunction with the County Attorney, receives and responds to program inquiries, refers callers to appropriate resources, provides community education, and inter-departmental and external community partner coordination. As efficiencies increase, it is anticipated that the department will have new opportunities to pursue additional funding.

### Reporting.

- We must report and monitor performance and expenditures through various reporting methods, including but not limited to, the Annual Action Plan, Consolidated Annual Performance and Evaluation Report (CAPER), the Consolidated Plan, and the State Housing Initiatives Partnership (SHIP) Annual Report, and Local Housing Assistance Plan (LHAP).
- Additional reporting requirements are associated with the following governance documents: Davis-Bacon, Section 3, MBE/WBE (Minority Business Enterprise/Woman Business Enterprise, Semi-Annual Labor Report), Consolidated Annual Financial Report (CAFR), Disaster Recovery Grant Reporting System (DRGR), and Advisory Housing Advisory Committee (AHAC) Incentives.
- Unclaimed Decedent Program, HCRA, and Non-Ad Valorem Tax Assistance requires annual reporting
- Health and Human Services – General revenue funds are provided annually to Kimberly Center and Marion County Children’s Advocacy Center as part of state-mandated health programs which require annual reporting.
- Continuum of Care – DCF monthly “roll-up” reports, quarterly SAGE reports, regional Point in Time (PIT) Count and Housing Inventory County (HIC) annual reports for U.S. Department of Housing and Urban Development and congressional national count

### Monitoring.

- Contract Performance Requirements for the term of the loan(s)
- Annual monitoring of contracts
- Maintenance of deferred mortgage loans (approx. value of \$48,403,939)

## Board and Committee Facilitation.

Affordable Housing Advisory Committee (AHAC), Lenders' Consortium, Housing Finance Authority of Marion County (HFA), Continuum of Care Board of Governors (CoC BOG) oversight, and expansion of Continuum of Care Membership.

## Key Highlights of Fiscal Years 2018-2021

### Community Development

- Development of Beacon Point which added nine (9) substance abuse recovery beds
- Installation of water sewer lines in Silver Spring Shores
- City of Belleview Community Center
- Veterans Helping Veterans capacity increase
- Construction of Heart of Florida Pharmacy
- Installation of Shores Assembly of God kitchen
- Installation of roof and air conditioners for Heart of Florida Main location
- CEP Microenterprise Business Loans assisted 30 local microenterprises
- Reviewing and revising the Community Revitalization Area (CRA) Plan for Silver Springs
- Construction of the Transitions Life Center Community Center
- Installation of Marion County's Human Resources ADA accessible ramp

### Housing

- Due to HB 1339, the Affordable Housing Advisory Committee (AHAC) has been re-engaged
- Awarded DEO Technical Assistance Grant for Housing Strategies
- Added forty-two (42) affordable rental housing units within the past three years
- Added twenty-seven (27) new single-family residential housing
- Assisted 440 households with Rent, Mortgage and Utility Assistance program during COVID pandemic in partnership with United Way of Marion County

### Homelessness

- Creation of the Ocala/Marion Joint-Office on Homelessness FL-514
- In FY 2020-21, the Continuum of Care received additional COVID pandemic response funding for high performance
- Installation of Salvation Army Soup Kitchen
- Construction of Shepherd's Lighthouse Transitional Living expansion

## Health and Human Services

- In FY 2019-2020, the County disposed of 78 unclaimed decedents at a cost of \$49,990.96 and 624 staff hours (approx. wage equivalent of \$15,000) for decedent processing.
- In FY 2020-21, the department contracted with Roberts Funeral Home service provider for the disposition of the State of Florida mandated Unclaimed Decedent program
  - Through its partnership with Roberts Funeral Home, 129 bodies were processed. The County expended \$42,690 in disposition. Staff hours expended were minimal.
  - Due to the service provider's participation in certain programs, the County was charged for only 60 dispositions, **a savings of \$49,680.**
- In FY 2020-21, the department:
  - Processed 57 We Care applications, of which 55 were approved;
  - Received 58 HCRA cases and approved 32 claims, expending \$187,118.96; and
  - Assisted 58 clients through its LINATA program, expending \$16,820.80.

## Future State

As an entitlement community, Marion County's growing population has increased available funding and changed the types of funding received.

Population Projection		Sources: Census and U.S. Department of Housing and Urban Development		
Marion County	2020	2021*	2026	
Population Size	375,908	378,613	406,629	
Median Household Income	\$49,722	\$55,600		
Homeownership rate	74%	75%		
Growth Rate	1.75%	1.75%	1.75%	

## Funding Source Changes.

Grant Year	CDBG	HOME	ESG	SHIP	CoC	County ARPA	Total Funding
2015	\$ 1,770,098	\$ 635,783	\$ 156,678	\$ 1,381,313			\$ 3,943,872
2016	1,799,054	655,883	159,344	1,814,417			4,428,698
2017	1,774,181	635,557	161,964	1,244,727			3,816,429
2018	1,878,567	891,055	159,205	470,408			3,399,235
2019	1,923,601	814,313	159,401	569,631	\$ 136,882		3,602,828
	1,165,299		582,834				1,748,133
2020	1,980,901	864,892	169,022		450,511		3,465,326
	1,025,481		1,550,489	1,208,997	313,000		4,097,967
2021	2,041,257	887,773	168,937	2,027,820	454,147		5,579,934
		3,217,585			1,257,639	\$4,000,000	8,475,224
Total	\$15,358,439	\$8,602,841	\$ 3,267,874	\$ 8,716,313	\$ 2,612,179	\$4,000,000	\$42,557,646

FUNDING CHANGES	
	COVID-19 Response Funds
	American Rescue Plan Act Funds

## Workload Changes.

Community Services will reorganize individual workloads to support its cross-training initiative. The department will also perform a comprehensive review and update of job descriptions aligned with the reorganization and future organization staffing needs. Further, Community Services will leverage existing technology to semi-automate document and contract packages to reduce repetitive manual data entry and reduce project processing times, where applicable.

In FY 2018-19, Community Services staff consisted of ten (10) FTE positions; within the last three years, the department had six (6) individuals with organizational and institutional knowledge retire. The department is actively recruiting to fill vacant positions.

Over the last four years, Community Services has been operating in the financial arrears, which caused a “grant snowball” effect creating missed opportunities in training and education; additionally, it caused an underlying sense of urgency within the department to get current in its expenditures. The ideal method of grant expenditure is to fully encumber the grant year allocation(s) with any historical balances being fully expended upon the completion of the contracted project. Additionally, the department will align its grant application cycle with the County’s budget schedule.

The workload of the department has been the greatest change the department has experienced in the past 18 months. With the onset of the pandemic and the addition of the CoC, funding increased significantly. **Additional funding directly affects production as timeliness requirements for grant fund expenditures remain.** This requirement highlights the need to reorganize duties within the department, improve the department’s professionalism, structure and processes, allocate accountability accordingly, and meet current and future transparency requirements. Moreover, a redistribution of duties will allow for several opportunities: grant writing, program income capture, aligning the department’s goals with the County’s Five Year Administrative Strategic Plan (Plan), and increased inter-departmental collaboration to meet the demands of the Plan.

# PROPOSED ORGANIZATIONAL CHART





## Additional Assets.

Community Services has the ability to earn Program Income (PI) through its CDBG, HOME, NSP, ARPA and SHIP entitlement grants. Community Services uses ninety-five percent (95%) of PI earned to fund additional projects which generate additional revenue. A maximum of five percent (5%) of PI may be used for administrative services. Recaptured funds available through new construction projects is treated as PI. Further, each contract for new construction, acquisition, and rehabilitation carries a deferred mortgage against grant funds provided to ensure the facilities are used in accordance with the contract during the associated mortgage period. Should a subrecipient breach their contract, the subrecipient must reimburse Community Services for the full deferred mortgage amount. Community Services currently holds deferred mortgages on public facilities and residential properties, with periods between 6-30 years which require annual monitoring. **The total amount of funds held in liens is approximately \$48,403,939.**

## Additional Cost of Changes.

Community Services may incur additional costs as follows:

- Education and training expenditures
- Acquiring qualified staff
- Possible software acquisition(s)
- Outsource Direct Service programs (e.g., housing rehab, mortgage collector, and purchase assistance)
- Partner with current technical assistance vendors, Human Resources, and others to develop training curriculum and materials

## Secure New Funding.

Community Services has an opportunity to pursue additional entitlement funding that aligns with the County's Five Year Administrative Strategic Plan as new grant opportunities become available. A grant writer position may be needed to meet this goal.

# Implementation Program

## Our Goals.

The Operational Plan provides an overview of existing programs, staffing levels, grant funding, eligible activities and topics relevant to the department. An analysis conducted on the department's strengths, weaknesses, and opportunities revealed a strategic direction for Community Services over the next five years to address department goals.

**Four Strategic Objectives were developed to achieve the opportunities identified. Measurable objectives and detailed work metrics, Key Performance Indicators (KPIs), have been formulated to capture progress and aid in the achievement of these goals by end of Fiscal Year 2026.**

## Primary Objectives

The department has developed several initiatives to obtain its objectives.

### A. Professionalism

The department will maintain professionalism by:

- a) Improving its project tracking system by modifying existing databases to capture project specific information and timelines. Project tracking will incorporate appropriate documentation and checklists after each phase;
- b) Using the County's HICARD as a model for both internal and external relationships: Humbleness, Integrity, Commitment, Accountability, and Respect;
- c) Addressing education and training deficiencies through cross-training, team building, leadership training, public speaking, regulations, webinars, business and technical writing, and advanced computer skills. Board participation will improve by training team on Robert's Rules, taking and transcribing minutes, agenda creation, and discussion leadership. This initiative will create a more efficient workflow, provide for gap coverage due to absenteeism and/or separation, and enhance customer service. Further, this will create a natural succession pipeline for future position vacancies; and
- d) Improving accountability and organization by leveraging existing technology for digital storage and to accommodate work volume by creating a semi-automated process to improve efficiencies as work volume fluctuates, reduce manual entry of repetitive information and errors, as well as create a database which keeps an accurate record of projects by program.

## B. Accountability.

The department will increase accountability by:

- a) Developing a master calendar of all reporting dates and deadlines by calendaring all reporting date requirements to improve planning and timeliness;
- b) Ensuring systems are in place to capture information for improved accountability and ease and accuracy of reporting;
- c) Creating an enhanced training program for managers on finance and budget which will promote project expenditure awareness when reconciling project financial records as well as meeting expenditure deadlines; and
- d) Improving expectations for external and internal customers by improving reporting outcomes and interdepartmental collaboration for consistency.

## C. Transparency.

The department will enhance transparency by:

- a) Developing new and improving existing systems to enhance fiscal transparency and capture project information;
- b) Enhancing the department's website to include advertising and marketing materials promoting community education, awareness, and engagement;
- c) Extending community outreach by developing materials, launching an educational curriculum for internal and external customers on affordable housing initiatives, providing technical assistance to organization for funding opportunities aligned with Community Services and County goals, and improving rural/diverse neighborhood engagement and communicate needs; and
- d) Identifying new and improving existing relationships with internal and external partners to provide direct services in alignment with the County's Five Year Administrative Strategic Plan. Community Services acts in an administrative capacity to support the activities of identified community needs and compliance oversight to agencies.

## D. Structure.

The department will improve structure by:

- a) Continuously reviewing and updating policies and procedures to accommodate regulation changes, promote efficiencies, improve transparency, and align department goals with County goals;
- b) Performing a comprehensive update of job descriptions aligned with the reorganization and future organization staffing needs;

- c) Continuing the development of Key Performance Indicators (KPIs) to track staff performance on business objectives and production which will improve time management, provide proactive success in achieving goals and deadlines, and improving engagement with staff; and
- d) Aligning the grant funding process with the County's budget development timeline which will ensure consistency with County processes, federal and state reporting requirement deadlines, and improved reporting to include accurate data.

# APPENDICES

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## APPENDIX A

### Goals and Initiatives – Professionalism

Goals	Initiative	Frequency	Results
<b>Goal 1</b> Improve Project Tracking	A. Modify existing databases to capture project specific information and timelines	A. Quarterly	A. Improved project timeliness to include appropriate documentation and checklists after each phase
<b>Goal 2</b> Expand Education and Training	A. HICARD emphasis B. Cross-training Client Service Specialists (CSS) to manage multiple grant programs C. Technical writing training	A. Daily B. Weekly C. Monthly	A. Improved staff performance B. Reorganization will allow for: <ul style="list-style-type: none"> <li>• Efficient workflow</li> <li>• Gap coverage</li> <li>• Enhanced customer service</li> <li>• Develop program managers</li> </ul> C. Proactive and thorough communication
<b>Goal 2</b> Increased Accountability	A. Leverage existing technology for digital storage B. Create enhanced systematic file system for hard files by funding source	A. Daily B. Monthly	A. Central file location will provide ease of access and storage B. Electronic file records will accelerate file information access
<b>Goal 2</b> Improved Organization	A. Leverage existing technology to accommodate increased work volume by creating a semi-automated process B. Create boilerplate documents for all programs	A. Daily B. Monthly	A. Accommodate increased work volume by improving efficiencies B. Reduce manual entry of repetitive information and reduce errors C. Database keeps accurate log of projects by program

## APPENDIX A

### Goals and Initiatives – Accountability

Goals	Initiative	Frequency	Results
<b>Goal 1</b> Develop a master calendar of all reporting dates and deadlines	A. Calendar all reporting date requirements. B. Create Master single-page annual document C. Prepare annual release of application periods to public to be published on website	A. Quarterly B. Annually C. Annually	A. Improved timeliness B. Improved planning
<b>Goal 2</b> Ensure systems are in place to capture information	A. Reporting systems B. IDIS C. HMIS D. DRGR	A. Monthly B. Monthly C. Monthly D. Monthly	A. Improved accountability B. Ease of reporting
<b>Goal 3</b> Enhanced training for program managers on finance and budget	A. Reconciling financial projects B. Update financial tracking reports	A. Monthly B. Monthly	A. Promotes awareness of expenditures B. Promotes awareness of expenditure deadlines

# APPENDIX A

## Goals and Initiatives – Transparency

Goals	Initiative	Frequency	Results
<b>Goal 1</b> Fiscal transparency	A. Develop new and improve existing systems to capture information	A. Weekly	A. Improved transparency B. Reporting data easily shareable
<b>Goal 2</b> Enhanced department website	A. Advertising & Marketing materials B. Reporting accomplishments	A. Quarterly B. Annually	A. Community engagement B. Community awareness
<b>Goal 3</b> Extend community outreach	A. Develop materials for community outreach B. Launching education of internal/external customers on affordable housing initiatives C. Technical assistance to organizations for funding opportunities D. Improve rural/diverse neighborhoods engagement	A. Quarterly B. Annually C. Annually D. Bi-Annually	A. Community engagement B. Community education C. Align funding opportunities with goals D. Improved communication and awareness of needs
<b>Goal 4</b> Identify new and improve existing relationships with internal and external partners to provide direct services to be in alignment with the County's 5 Year Administrative Strategic Plan	A. Identify new partners B. Increase collaboration with existing internal/external partner relationships C. Provide technical support D. Provide compliance oversight	A. Monthly B. Monthly C. Quarterly D. Annually	A. Improved communication and awareness of needs B. Implement County's 5 Year 2022-2026 Administrative Strategic Plan C. Align funding with opportunities with goals D. Improved compliance



## APPENDIX A

### Goals and Initiatives – Structure

Goals	Initiative	Frequency	Results
<b>Goal 1</b>			
Continuously review and updates of policies and procedures to accommodate changes in regulations	A. Review and update existing written procedures	A. Annually	A. Increased efficiency
	B. Review and update existing department policies and incorporate to ensure alignment with funding sources	B. Monthly	B. Improved transparency
	C. Review and incorporate Administrative policies, ordinances and resolutions.	C. Quarterly	C. Improved alignment with goals
<b>Goal 2</b>			
Continued development of Key Performance Indicators (KPIs)	A. Develop individual annual goals	A. Annually	A. Improved Time Management
	B. Track staff performance on business objectives and production	B. Monthly	B. Meeting goals & deadlines proactively
	C. Comprehensive update to existing position descriptions	C. Annually	C. Improved engagement with staff
<b>Goal 3</b>			
Align grant funding process with budget development timeline	A. Action Plan	A. Monthly	A. Consistency with County processes, federal & state reporting requirement deadlines B. Improved reporting to include accurate data
	B. CoC	B. Monthly	
	C. LHAP	C. Annually	
	D. CAPER	D. Annually	
	E. Annual Report	E. Annually	

## APPENDIX B - KEY TO ACRONYMS

- AI – Analysis of Impediments to Fair Housing
- AHAC – SHIP Affordable Housing Advisory Committee
- AHCA – State Agency for Health Care Administration
- ARPA – American Rescue Plan Act of 2021
- CDBG – Federal Community Development Block Grant funds
- CoC – Continuum of Care
- CPD – Federal Department of Community Planning and Development under HUD
- CSS – Client Services Specialist
- CV – COVID-19 Pandemic CARES Act funding
- DCF – Department of Children and Families
- DRGR – Disaster Recovery Grant Reporting – reporting of NSP program
- DVS – Domestic Violence Shelter
- ESG – Federal Emergency Solutions Grants funds
- FCDA – Florida Community Development Association – Professional Organization
- FHC – Florida Housing Coalition – provides technical assistance and training
- FHFC – State of Florida Housing Finance Corporation – administers SHIP
- FTE – Full Time Equivalent
- GR – County General Revenue funds
- HCRA – Health Care Responsibility Act – State Mandated Program
- HFA – Housing Finance Authority of Marion County
- HMIS – Health Management Information System
- HOME – Federal HOME Investment Partnership funds
- HP – Homeless Prevention Program
- HPRP – Federal Homelessness Prevention and Rapid-Rehousing Program–Stimulus funds
- HUD – Federal U.S. Department of Housing and Urban Development
- IDIS – Integrated Disbursement and Information System – HUD reporting / reimbursements
- LINATA – Low Income Non Ad-Valorem Tax Assistance
- LHAP – Local Housing Assistance Plan for SHIP funding
- ME/MEO – Medical Examiner/Medical Examiner’s Office
- NCCA – National Community Development Association – Professional Organization
- NSP – Federal Neighborhood Stabilization Program funds – Stimulus funds
- PIO – County Public Information Office
- P&P – Policies and Procedures
- RR – Rapid Rehousing program
- SHIP – State Housing Initiatives Partnership funds
- TANF – Temporary Assistance for Needy Families

## APPENDIX C - DEFINITIONS

- Community Development Block Grant (CDBG) supports community development activities to build stronger and more resilient communities. To support community development, activities are identified through an ongoing process. Activities may address needs such as infrastructure, economic development projects, public facilities installation, community centers, housing rehabilitation, public services, clearance/acquisition, microenterprise assistance, code enforcement, homeowner assistance, etc. CDBG funds must benefit a low to moderate income population; may also be used to eliminate slum and blight and for urgent need.
- Neighborhood Stabilization Program was established for the purpose of providing emergency assistance to stabilize communities with high rates of abandoned and foreclosed homes, and to assist households whose annual incomes are up to 120 percent (120%) of the Area Median Income (AMI).

The U.S. Congress appropriated three rounds of NSP funding. Congress has not allocated any additional funds to NSP since the third round of funding, and most grantees are in the process of completing activities and closing out their grants by converting funds to CDBG.

- NSP1 provided \$4.0 billion to 307 state and local governments on a formula basis. NSP1 was established by Section 2301(b) of the Housing and Economic Recovery Act of 2008 (Pub. L.110-289, approved July 30, 2008), also known as HERA. HERA created NSP and was the basis for subsequent NSP funding rounds.
- NSP3 provided an additional \$1 billion on a formula basis to 270 state and local governments. NSP3 was authorized by Section 1497 of the Wall Street Reform and Consumer Protection Act of 2010 (Publ. L 111-203, approved July 21, 2010), also known as the “Dodd-Frank Act.”

NSP funds were used for activities which included:

- Establish financing mechanisms for purchase and redevelopment of foreclosed homes and residential properties
- Purchase and rehabilitate homes and residential properties abandoned or foreclosed
- Establish land banks for foreclosed homes
- Demolish blighted structures
- Redevelop demolished or vacant properties

## APPENDIX C - DEFINITIONS

In addition, NSP funds were required to meet one of the following CDBG national objectives:

- Housing Activities: Providing or improving permanent residential structures that will be occupied by a household whose income is at or below 120% of area median income.
  - Area Benefit Activities: Benefiting all the residents of a primarily residential area in which at least 51% of the residents have incomes at or below 120% of area median income. (NSP1 only)
  - Limited Clientele Activities: Serving a limited clientele whose incomes are at or below 120% of area median income.
- 
- HOME Investment Partnerships Grant (HOME) provides grants to state and local governments to create affordable housing for low-income households.
  - HOME American Rescue Plan Act Grant (HOME-ARPA) provides funding to HOME participating jurisdictions to reduce homelessness and increase housing stability across the country.
  - Emergency Solutions Grants (ESG) addresses the needs of homeless people in emergency or transitional shelters to assist them in regaining stability in permanent housing after experiencing a housing crisis and/or homelessness. [Homeless Emergency Assistance and Rapid Transition to Housing Act of 2009 (HEARTH Act)]
  - State Housing Initiatives Partnership (SHIP) is administered by Florida Housing Finance Corporation. The program provides funds to local governments to incentivize the creation of partnerships that produce and preserve affordable homeownership and multifamily housing. The program was designed to serve very low, low and moderate income families.

Funds are distributed on an entitlement basis; the minimum allocation is \$350,000. To participate, local governments must establish a Local Housing Assistance Program (LHAP) by ordinance; develop a local housing assistance plan and housing incentive strategy; amend land development regulations or establish local policies to implement the incentive strategies; form partnerships and combine resources in order to reduce housing costs; and ensure that rent or mortgage payments within the targeted areas do not exceed 30 percent (30%) of the Area Median Income limits, unless authorized by the mortgage lender.

Eligible activities include emergency repairs, new construction, rehabilitation, down payment and closing cost assistance, impact fees, construction and gap financing, mortgage buy-downs, acquisition of property for affordable housing, matching dollars for

## APPENDIX C - DEFINITIONS

federal housing grants and programs (e.g., HOME), and homeownership counseling. SHIP funds may be used to assist units that meet the standards of Chapter 553, Florida Statutes. This grant requires certain activity set asides be met. No more than 10 percent (10%) of funds may be used for administrative expenses. Funding for this program was established by the passage of the 1992 William E. Sadowski Affordable Housing Act. Funds are allocated to local governments on a population-based formula.

- CARES Act Grants

*Community Development Block Grant CARES Act (CDBG-CV)*

- Congress provided \$5 billion in the Coronavirus Aid, Relief, and Economic Security (CARES) Act for the CDBG program to states, metropolitan cities, urban counties, and insular areas to prevent, prepare for, and respond to Coronavirus. Activities must benefit residents within the jurisdiction of the grantee or as permitted by the CARES Act.
- Community Development Block Grant CARES Act (CDBG-CV) provides funding for the following eligible activities: public service, housing, public improvements and facilities, acquisition of real property, economic development, and general administrative and planning activities.
- At least 70 percent (70%) of every grant must be expended for activities that benefit low- and moderate-income persons by providing housing, a permanent job, a public service, or access to new or significantly improved infrastructure. The remaining 30 percent may be used to eliminate slum or blighted conditions, or to address an urgent need for which the grantee certifies it has no other funding.

*Emergency Solutions Grants CARES Act (ESG-CV)*

- The CARES Act appropriated \$4 billion through the Emergency Solutions Grants (ESG) program “to prevent, prepare for, and respond to coronavirus, among individuals and families who are homeless or receiving homeless assistance and to support additional homeless assistance and homelessness prevention activities to mitigate the impacts created by coronavirus under the Emergency Solutions Grants program.
- Emergency Solutions Grants CARES Act (ESG-CV) provides funding for the following eligible activities: sponsor-based rental assistance, personal protective equipment, training, temporary emergency shelters, landlord incentives, etc.

## APPENDIX C - DEFINITIONS

- Continuum of Care (CoC) Program is designed to promote communitywide commitment to the goal of ending homelessness, provide funding for efforts by nonprofit providers, and State and local governments to quickly rehouse homeless individuals and families while minimizing the trauma and dislocation caused to homeless individuals, families, and communities by homelessness; promote access to and effect utilization of mainstream programs by homeless individuals and families; and optimize self-sufficient among individuals and families experiencing homelessness.
- Administrative Grants
  - HUD Staffing
  - DCF Administrative
- Department of Children and Families (DCF) grants
  - Challenge Grant provides funding for homeless assistance received by DCF must be coordinated through the CoCs per Florida Statutes 420.622. CoCs subcontract with community partners to fund direct services provision to the homeless population. This partnership provides local control of projects tailored to meet the specific needs of the community.
  - Emergency Solutions Grants (ESG) addresses the needs of homeless people in emergency or transitional shelters to assist them in regaining stability in permanent housing after experiencing a housing crisis and/or homelessness. [Homeless Emergency Assistance and Rapid Transition to Housing Act of 2009 (HEARTH Act)]

ESG funds are available for five (5) program components:

1. Street Outreach
2. Emergency Shelter
3. Homelessness prevention
4. Rapid Re-housing Assistance
5. Data Collection through Homeless Management Information System (HMIS)

Temporary Assistance for Needy Families (TANF) provides States and territories with flexibility in operating programs designed to help low-income families with children achieve economic self-sufficiency. States use TANF to fund monthly cash assistance payments to low-income families with children, as well as a wide range of services that are designed to address one or more of the program's four broad purposes:

- Provides assistance to needy families to that children can be cared for in their own homes or in the homes of relatives
- End the dependence of needy parents on government benefits by promoting job preparation, work, and marriage
- Prevent and reduce the incidence of out-of-wedlock pregnancies

## APPENDIX C - DEFINITIONS

- Encourage the formation and maintenance of two-parent families

### Emergency Solutions Grants CARES Act (ESG-CV)

- We Care provides access to necessary volunteer medical services and specialists for low income, uninsured residents of Central Florida, unqualified for Medicaid, at no charge.
- Non-Ad Valorem Tax Assistance provides financial assistance to eligible low income individuals for payment of non-ad valorem assessment of property taxes
- Unclaimed Decedent Program provides a uniform procedure for cremation of deceased Marion County unclaimed or indigent residents in a decent and dignified manner and in accordance with Florida Statutes 406.50-406.61. Marion County is responsible for the disposition of unclaimed bodies when the death occurs or the body is found in Marion County.
- Health Care Responsibility Act (HCRA) requires Counties to reimburse participating out-of-county hospitals for emergency or pre-approved non-emergency care provided to indigent residents when not available in Marion County.

# APPENDIX D – KEY PERFORMANCE INDICATORS (KPI) - EXAMPLE



## Key Performance Indicator (KPI) Dashboard

Marion County Community Services

Date:

CLIENT SERVICE SPECIALISTS (4)

Metric		%	Actual	Target	Difference	Score	Comments
1	Phone Calls/Case Management	0.00		480	-480	0%	
2	Monitoring/Client Meetings	0.00		260	-260	0%	
3	Front Desk Coverage	0.00		26	-26	0%	
4	Applications Approved/Denied	0.00		260	-260	0%	
5	Income Verification	0.00		260	-260	0%	
6	Recorded Liens/Subordination of Mortgages	0.00		10	-10	0%	
7	Contract/Community Development	0.00		15	-15	0%	
8	Debt Collection(s)	0.00		5	-5	0%	
9	Payment Requests	0.00		200	-200	0%	
10	Unclaimed	0.00		25	-25	0%	
11	HCRA	0.00		25	-25	0%	
12	WeCare	0.00		10	-10	0%	
13	File Management	0.00		50	-50	0%	
14	File Audit(s)	0.00		260	-260	0%	
15	Internal Trainings	0.00		6	-6	0%	
16	Staff Meetings	0.00		6	-6	0%	
17	CSS Meetings	0.00		156	-156	0%	
18	Completion of Safety Programs	0.00		16	-16	0%	
19	Attendance	0.00		248	-248	0%	