

# Executive Summary

## AP-05 Executive Summary - 91.200(c), 91.220(b)

### 1. Introduction

Marion County, Florida is an entitlement community under the U.S. Department of Housing & Urban Development's (HUD) for the following Federal programs:

- Community Development Block Grant (CDBG),
- HOME Investment Partnerships (HOME), and
- Emergency Solutions Grant (ESG).

Marion County receives CDBG and ESG funds directly from HUD as an entitlement county. Marion County administers HOME funds as a HOME Participating Jurisdiction (PJ) on behalf of the Marion County Consortium, a partnership between Marion County as the lead entity and the City of Ocala as a participating member.

To receive these funds from HUD, Marion County must create a yearly plan called an Annual Action Plan (AAP) as required by 24 Code of Federal Regulations (CFR) Part 91. The plan identifies goals for the program year, the County's anticipated resources, and the specific projects and activities that the County will carry out over the program year to achieve these goals. This plan is updated annually, in accordance with federal regulations, and serves as a basis for assessing performance. The Marion County 2023-2024 AAP plans for the period from October 1, 2023, to September 30, 2024 and is approved by the Marion County Board of County Commissioners.

Each AAP is part of a larger 5-year plan called the Consolidated Plan that identifies the County's housing goals and priorities, special populations, and community development needs. Each AAP identifies specific projects and activities and outlines anticipated resources in accordance with the goals of the Consolidated Plan. The Marion County 2023-2024 AAP plans for the fifth and final year within the approved 2019-2023 Consolidated Plan for Marion County.

The lead entity responsible for the preparation of the AAP is the Marion County Community Services Department. Additional information was provided by the Marion County Consortium.

The lead entity responsible for the preparation of the AAP is the Marion County Community Services Department.

## 2. Summarize the objectives and outcomes identified in the Plan

This could be a restatement of items or a table listed elsewhere in the plan or a reference to another location. It may also contain any essential items from the housing and homeless needs assessment, the housing market analysis or the strategic plan.

The current 2019-2024 Consolidated Plan indicates that funds should be expended to achieve the following priority needs and goals for low- to moderate-income households and/or predominantly low-income areas: Essential Housing, Homelessness, and Community Development.

### **Priority Need 1 - Essential Housing-** HOME and CDBG

**Objective** - maintain the existing and increase the availability of essential, affordable units for rent and homeownership

**Outcome** - Affordability and Sustainability

**Specific Outcome Indicator** – HOME will provide Housing Rehab for ten (10) families, New Construction of 10 homes, Acquisition and Rehab of 10 units for rental.

### **Priority Need 2 - Homelessness-** ESG

**Objective** - prevent further instances of homelessness and reduce the number of those currently experiencing literal homelessness

**Outcome** - Affordability and Sustainability

**Specific Outcome Indicator** – ESG Homeless Rapid Rehousing to assist 15 families/individuals and ESG Homeless Prevention to assist 660 families/individuals.

### **Priority Need 3 - Community Development-** CDBG (projects may include public service, public infrastructure, and non-profit facilities)

**Objective** - provide assistance to non- and for- profit businesses to increase capacity, create/retain jobs, and improve neighborhoods.

**Outcome** - Sustainability

**Specific Outcome Indicator** – Public Service to serve 22 people; Public Infrastructure to serve 450 families; improvement to a non-profit facility will benefit 3,500 people.

## 3. Evaluation of past performance

This is an evaluation of past performance that helped lead the grantee to choose its goals or projects.

Marion County is approaching the completion of its fourth year of the 2019-2024 Five-Year Consolidated Plan.

During the 2022-2023 grant year to date, the following activities were initiated or accomplished towards the goals outlined in the 2019-2024 Consolidated Plan:

- Economic Development
- Owner-Occupied Residential Rehab
- Public Facility New Construction
- Public Facility Renovations
- Public Infrastructure
- Public Service
- Purchase Assistance

Marion County consistently reaches its expected outcomes for public service, while the costs within the housing market have been an obstacle in reaching the expected outcomes in rehabilitation, construction, and purchase assistance goals. The County will continue to allocate annual CDBG and HOME entitlement funds to the categories of activities outlined in the list above, while also reprogramming unspent prior year funds to supplement expected funds in order to make the most impact. This is especially true for those rehabilitation, construction, and infrastructure projects that are often more costly and require more funding streams outside of HUD CPD funding.

#### **4. Summary of Citizen Participation Process and consultation process**

Summary from citizen participation section of plan.

The Community Services Department hosted and participated in many meetings with the public and stakeholders leading up to the development of the 2023-2024 Annual Action Plan (AAP). The Department explored needs, as well as providing technical assistance to those organizations that may be interested in pursuing a CDBG, HOME, or ESG application for funding.

Community Services staff participated in numerous meetings that informed the development of this 2023-2024 AAP. Those meetings explored needs of the community and provided technical assistance to some organizations interested in pursuing funds described in the Marion County Notice of Funding Availability.

#### **5. Summary of public comments**

This could be a brief narrative summary or reference an attached document from the Citizen Participation section of the Con Plan.

Marion County committed to a 30-day public comment period, which began as advertised in the local media, social media, and the Community Services webpage. Documents were posted online on July 1, 2023, and completed with an open public comment period at the properly advertised and commenced Commission Hearing on August 1, 2023. Marion County did not receive any public comment concerning the Annual Action Plan.

**6. Summary of comments or views not accepted and the reasons for not accepting them**

Not applicable as our office did not receive any public comment(s).

**7. Summary**

In January 2023, the Community Services Department posted a Notice of Funding Availability (NOFA) through the Ocala Star Banner and online social platforms. The NOFA informs the public that the Community Services Department is accepting applications for funding based on priorities established in the five-year Consolidated Plan. Projects are selected through a scoring committee, after which the County will close the application process. If a selected project is unable to move forward, the application process may be reopened. The grant scoring and award process allows staff to review funding proposals for eligibility and to educate interested applicants on the grant funding process to ensure their success. Projects that meet the eligibility criteria but are not funded may be placed on a waitlist maintained by the County.

**PR-05 Lead & Responsible Agencies - 91.200(b)**

**1. Agency/entity responsible for preparing/administering the Consolidated Plan**

The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

<b>Agency Role</b>	<b>Name</b>	<b>Department/Agency</b>
CDBG Administrator	MARION COUNTY	Community Services Department
HOME Administrator	MARION COUNTY	Community Services Department
ESG Administrator	MARION COUNTY	Community Services Department

**Table 1 – Responsible Agencies**

**Narrative**

Marion County Community Services is an entitlement recipient of CDBG, HOME, and ESG funds. Community Services is also the lead agency in the HOME Consortium with the City of Ocala, the largest incorporated city in Marion County.

**Consolidated Plan Public Contact Information**

Marion County Community Services

2710 E. Silver Springs Blvd.

Ocala, FL 34470

352-671-8770

[www.marionfl.org/communityservices](http://www.marionfl.org/communityservices)

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## **AP-10 Consultation - 91.100, 91.200(b), 91.215(l)**

### **1. Introduction**

In preparation for the 2023 Annual Action Plan, the County consulted with other public and private agencies that provide housing, health, and social services, including those focusing on services to homeless persons, children, elderly persons, and people with disabilities. The public and private agencies contacted include, but are not limited to: Marion County Continuum of Care (CoC), United Way, Ocala Housing Authority, Housing Finance Authority of Marion County and City and County staff.

#### **Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(l)).**

Marion County's Community Services Department consults with the Ocala Housing Authority (OHA) concerning public housing needs and any planned grant program activities. This ongoing consultation ensures and provides a basis for the certification, by the Marion County's Board of County Commissioners, that the current Annual Action Plan is consistent with Marion County's assessment of low-income housing needs. It also helps ensure that any proposed activities that are directed towards neighborhood improvement and/or any resident programs and/or services funded under or by the Ocala Housing Authority, and those funded under any programs covered by the Consolidated Plan, are fully coordinated to achieve comprehensive community development goals.

Similarly, the County works closely with other government agencies as well as service provider networks to readily understand needs and develop reliable infrastructure to program funds based around those needs.

#### **Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness.**

In partnership with the City of Ocala, Marion County manages the Continuum of Care as the lead agency for FL-514 region through the "Ocala/Marion County Joint Office on Homelessness". Marion County oversees all administrative aspects of the local HUD CoC program and network, and the Community Services Department in which it is housed has been structured in a way that separates entitlement funding

management from CoC management between three division managers who work together for enhanced collaboration and alignment between entitlement CDBG, HOME, ESG, SHIP, and all CoC-based funding sources and local allocation procedures.

Marion County is involved in all CoC strategic planning and coordination events to cater to the local policy that guides rapid rehousing and homeless prevention of individuals, families, families with children, veterans, and unaccompanied youth. This includes funding alignment with the network's needs and CoC-identified assistance gaps for low-income and homeless aid. Marion County works with the CoC Board of Governors to gain insight into the local program needs to ensure HUD and/or State NOFA priorities include the housing-related requirements identified by the CoC network. The Ocala/Marion County Joint Office on Homelessness develops and leads the regional Coordinated Entry program to prioritize clients based on vulnerability level for timely assignment to case management and wrap-around services funded by ESG and CoC-based grants.

It is anticipated that there will be an increase in opportunities to collaborate with the CoC and homeless serving agencies with the implementation of HOME-ARP funds.

**Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards for and evaluate outcomes of projects and activities assisted by ESG funds, and develop funding, policies and procedures for the operation and administration of HMIS**

County staff attends all CoC membership and Board of Governors (BOG) meetings for monthly insight into the successes and challenges of the CoC network. Funding alignment is monitored by the County in partnership with the CoC in a way that allows for an all-inclusive view into the local resources available between Entitlement ESG, CoC ESG, CoC TANF, CoC CHALLENGE, and CoC NOFO grant funding awarded within the region. As CoC lead agency, performance standards are developed by Ocala/Marion County Joint Office of Homelessness through CoC Board of Governors and CoC Membership consultation on an annual basis to ensure alignment in local performance standard setting and program intent between all ESG-based funding sources available within the community. Marion County Community Development Department also contributes HUD CPD-based insight as a reoccurring CoC Strategic Planning Committee member to guide CoC policy and procedure development based on the resources available within Marion County and CoC-driven data collection relevant to affordable housing needs, shelter needs, programmatic needs, and policy/ordinance needs at both the city and county level.



**AP-10 Consultation - 91.100, 91.200(b), 91.215(l)**

**Table 2 – Agencies, groups, organizations who participated**

1	<b>Agency/Group/Organization</b>	Heart of Florida Health Center, Inc.
	<b>Agency/Group/Organization Type</b>	Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Health Services-Education Health Agency Publicly Funded Institution/System of Care Regional organization
	<b>What section of the Plan was addressed by Consultation?</b>	Anti-poverty Strategy
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	Anticipated outcomes of this consultation are to expand their existing services to the rural portions of our county, align them with the county's and the community's priorities, as well as the county's strategic plan.

2	<b>Agency/Group/Organization</b>	Marion County Hospital District
	<b>Agency/Group/Organization Type</b>	Services-Health Services-Education Health Agency Publicly Funded Institution/System of Care Regional organization Planning organization Business and Civic Leaders Foundation
	<b>What section of the Plan was addressed by Consultation?</b>	Homelessness Strategy
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	Anticipated outcomes of this consultation are to expand their existing services to the rural portions of our county, align them with the county's and the community's priorities, as well as the county's strategic plan.
3	<b>Agency/Group/Organization</b>	Florida Department of Health-Marion County
	<b>Agency/Group/Organization Type</b>	Housing Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Health Services-Education Health Agency Child Welfare Agency Publicly Funded Institution/System of Care

	<b>What section of the Plan was addressed by Consultation?</b>	Homelessness Strategy HOPWA Strategy Anti-poverty Strategy Lead-based Paint Strategy
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	Anticipated outcomes of this consultation are to expand their existing services to the rural portions of our county, continue providing data on Lead based paint hazard in our County. In addition the Health Department administers HOPWA for on behalf of Marion County.
4	<b>Agency/Group/Organization</b>	Ocala/Marion County Chamber & Economic Partnership
	<b>Agency/Group/Organization Type</b>	Regional organization Planning organization Business and Civic Leaders
	<b>What section of the Plan was addressed by Consultation?</b>	Housing Need Assessment Public Housing Needs Homelessness Strategy Market Analysis Economic Development Anti-poverty Strategy
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	Anticipated outcomes of this consultation are to expand their existing services to the rural portions of our county, align them with the county's and the community's priorities, as well as the county's strategic plan.

5	<b>Agency/Group/Organization</b>	UNITED WAY OF MARION COUNTY
	<b>Agency/Group/Organization Type</b>	Services - Housing Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Victims of Domestic Violence Services-homeless Services-Health Services-Education Services-Employment Service-Fair Housing Regional organization Business and Civic Leaders Foundation
	<b>What section of the Plan was addressed by Consultation?</b>	Housing Need Assessment Homelessness Strategy Market Analysis Economic Development
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	Anticipated outcomes of this consultation are to expand their existing services to the rural portions of our county, align them with the county's and the community's priorities, as well as the county's strategic plan.

6	<b>Agency/Group/Organization</b>	Vets Helping Vets of America
	<b>Agency/Group/Organization Type</b>	Services - Housing Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-homeless Services-Education Services-Employment Business and Civic Leaders Foundation
	<b>What section of the Plan was addressed by Consultation?</b>	Housing Need Assessment Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Strategy Anti-poverty Strategy
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	Anticipated outcomes of this consultation are to expand their existing services to the rural portions of our county, align them with the county's and the community's priorities, as well as the county's strategic plan.

7	<b>Agency/Group/Organization</b>	City of Ocala
	<b>Agency/Group/Organization Type</b>	Housing Services - Housing Services-homeless Service-Fair Housing Other government - Local Planning organization Business Leaders
	<b>What section of the Plan was addressed by Consultation?</b>	Housing Need Assessment Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy Economic Development Anti-poverty Strategy
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	The County partners with the City of Ocala through its HOME program and the Continuum of Care. Consultation occurs on projects inside and outside the City to ensure needs are being met particularly with housing and homeless services.
8	<b>Agency/Group/Organization</b>	OCALA HOUSING AUTHORITY
	<b>Agency/Group/Organization Type</b>	Housing PHA Services - Housing Services-homeless Service-Fair Housing

	<b>What section of the Plan was addressed by Consultation?</b>	Housing Need Assessment Public Housing Needs Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	The Ocala Housing Authority provides the County with Housing needs analysis based on its current waiting list and housing supply. The CEO of OHA is a board member of the CoC in which the Ocala/Marion Joint Office on Homelessness report to. It is anticipated to increase partnership with OHA to expand housing supply in Marion County through vouchers and creation of new affordable housing.
9	<b>Agency/Group/Organization</b>	City of Belleview
	<b>Agency/Group/Organization Type</b>	Other government - Local Business Leaders
	<b>What section of the Plan was addressed by Consultation?</b>	Anti-poverty Strategy Infrastructure needs in low income areas
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	City of Belleview renewed its Participation as an Urban County Entitlement. Anticipated outcomes are to increase consultation.
10	<b>Agency/Group/Organization</b>	City of Dunnellon
	<b>Agency/Group/Organization Type</b>	Other government - Local Business Leaders

	<b>What section of the Plan was addressed by Consultation?</b>	Infrastructure needs
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	City of Dunnellon renewed its Participation as an Urban County Entitlement. Anticipated outcomes are to increase consultation.
11	<b>Agency/Group/Organization</b>	Marion County Children's Advocacy Center, Inc.
	<b>Agency/Group/Organization Type</b>	Services-Children Services - Victims Child Welfare Agency
	<b>What section of the Plan was addressed by Consultation?</b>	Anti-poverty Strategy
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	Marion County Children's Advocacy they serve abused children in partnership with law enforcement. They have indicated a need for expansion to increase their services for the increased need. The expected outcome is they have received funding through the State of Florida to help with expansion which will improve coordination.

**Identify any Agency Types not consulted and provide rationale for not consulting**



**Other local/regional/state/federal planning efforts considered when preparing the Plan**

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Continuum of Care	Joint Office on Homelessness	The Joint Office consists of Community Services and the City of Ocala Community Development Services department. This allows the two local governments to delegate and align CoC resources with existing resources to homeless service providers by reducing duplication of funding towards the same activities.

**Table 3 – Other local / regional / federal planning efforts**

**Narrative**

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## **AP-12 Participation - 91.401, 91.105, 91.200(c)**

### **1. Summary of citizen participation process/Efforts made to broaden citizen participation Summarize citizen participation process and how it impacted goal-setting**

Citizen Participation was a key component in the development of the 2023 Annual Action Plan. County staff prepared for the Annual Action Plan by publishing a Notice of Funding Availability (NOFA) and Request for Applications (RFA) to prepare the public and potential applicants of the funding opportunity. Additionally, technical assistance for grant proposals was held on February 16, 2023 in person at the Marion County Growth Services Training Room. The application process was opened electronically beginning on March 7, 2023- March 20, 2023. Staff gave extensive one-on-one advice to several prospective applicants.

The 2019-2024 Consolidated Plan included a Citizen Participation Plan (Plan) that summarizes outreach efforts to engage the public and provides a list of locations where information and copies of the Plan may be obtained; explains the process to submit complaints or grievances; and explains the provision of technical assistance, if needed. As noted in the Citizen Participation Plan, public input is encouraged through timely public notices, public hearings and publication of information relating to proposed activities. Notices and agendas are published and/or posted at least seven (7) days before the date of all public meetings. All meetings are held at the Marion County McPherson Governmental Complex, which is centrally located in the community and accessible to all persons, including disabled persons. If special accommodations are necessary for participation of a physically disabled or non-English speaking person in the Consolidated Planning process, the County will provide appropriate accommodations.

The County published a notice of the Action Plan public hearings and public comment period in the Ocala Star Banner, a regional newspaper on [insert date]. Additionally, the notice of public hearings and public comment was published in [insert name of paper] on [insert date] to ensure non-English speaking residents had the opportunity to engage in the development of the AAP. the Consolidated Planning process, the County will provide the appropriate accommodations.

The 30-day public comment period began on July 1, 2023, and concluded on July 31, 2023 followed by the public hearing, at which time the draft Annual Action Plan was presented to County Commissioners for approval. Citizens were allowed to comment during all public hearings and public meetings or were able to submit comments in writing before or during the public hearings and public meetings. The public hearing was held on August 2, 2023.

## Citizen Participation Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	
1	Newspaper Ad	Non-targeted/broad community	Applications received for housing assistance, community development funding and homeless shelter support	No comments received	N/A	
2	Newspaper Ad	Non-targeted/broad community	Public comment period notification	N/A	N/A	
3	Public Hearing	Non-targeted/broad community	Public hearing held 07/18/2023. Approximately x people in attendance. No comments were received.	No comments received	N/A	<a href="https://marionfl.granicus.com/document.do?id=6a3260cf5a">https://marionfl.granicus.com/document.do?id=6a3260cf5a</a>
4	Public Hearing	Non-targeted/broad community	Public hearing held 8/1/2023. Approximately x people in attendance. No comments were received.	No comments received	N/A	<a href="https://marionfl.granicus.com/document.do?id=6a3260cf5a">https://marionfl.granicus.com/document.do?id=6a3260cf5a</a>

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	
5	Internet Outreach	Non-targeted/broad community	Unable to assess how many viewed the plan on the web site.	No comments received.	N/A	<a href="https://www.marionfl.org">https://www.marionfl.org</a>

**Table 4 – Citizen Participation Outreach**

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## Expected Resources

### AP-15 Expected Resources - 91.420(b), 91.220(c)(1,2)

#### Introduction

Marion County Community Services anticipates receiving \$2,173,063 in CDBG Program funds for the 2023 program year. These funds will be used to address priority needs identified in the Strategic Plan under housing, homelessness, and community development. Similarly, the County anticipates receiving \$1,062,353 in HOME funds and \$182,676 in ESG funds. These funds will also work to achieve the goals and meet the priority needs outlined in the Strategic Plan. The County is also anticipating the receipt of \$3,217,585 of American Rescue Plan (ARP) funds through its HOME program. Lastly, the County expects to receive \$2,579,555 in Neighborhood Stabilization Program (NSP) funds for the 2023 program

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year.

**Anticipated Resources**

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	2,173,063	0	745,888	2,918,950	[x]	CDBG funds are prioritized by aligning County priorities to meet an underserved need. It has been identified for an increase need in housing and housing services to include case management that allows for housing stability in addition to infrastructure to support an increase supply to housing.

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
HOME	public - federal	Acquisition Homebuyer assistance Homeowner rehab Multifamily rental new construction Multifamily rental rehab New construction for ownership TBRA	1,062,353	0	1,750,252	2,812,604		HOME funding will assist with increasing the supply of affordable housing, maintaining affordable housing and providing rent assistance to those in need of affordable housing.

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
ESG	public - federal	Conversion and rehab for transitional housing Financial Assistance Overnight shelter Rapid re-housing (rental assistance) Rental Assistance Services Transitional housing	182,676	0	0	182,676	171,589	ESG funds will be prioritized towards outreach service, and rapid re-housing.
Other	public - federal	Acquisition Housing New construction for ownership	0	0	0	0	0	

Table 2 - Expected Resources – Priority Table

**Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied**



**HOME:**

To satisfy the 25% HOME match requirement, the County relies on State Housing Initiative Program (SHIP) funding from the Florida Housing Corporation. Marion County anticipates to receive \$3,155,547 in SHIP funding for the FY 2022-2023 program year, enough to satisfy the HOME match requirements. These funds provide assistance to current homeowners, those wishing to become homeowners and to developers who can build new single and multi-family housing.

**ESG:** Through the Ocala/Marion Joint Office on Homelessness Marion County receives approximately \$107,000 in State funding. In addition, the County includes in its agreements with ESG subrecipients a 100% match responsibility for the total amount awarded.

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**If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan**

Marion County Community Services works closely with the Office of the County Engineer to identify County owned property suitable for single and multi-family units for rent and ownership. These properties are evaluated by location, proximity of services, and transportation availability. Some properties are put up to bid for developers to construct new units; others are donated to appropriate non-profits to construct units for rent and homeownership.

**Discussion**

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## Annual Goals and Objectives

### AP-20 Annual Goals and Objectives - 91.420, 91.220(c)(3)&(e)

#### Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Public Service	2019	2023	Affordable Housing Homeless Non-Homeless Special Needs Non-Housing Community Development	Marion County	Community Development	CDBG: \$325,959	Public service activities other than Low/Moderate Income Housing Benefit: 22 Persons Assisted
2	Public Infrastructure	2019	2023	Non-Housing Community Development	Marion County	Community Development	CDBG: \$458,378	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 3,500 Persons Assisted
3	Non-Profit Facility	2019	2023	Affordable Housing Homeless Non-Homeless Special Needs Non-Housing Community Development	Marion County	Community Development	CDBG: \$1,000,000	Public service Activities for Low/Moderate Income Housing Benefit: 450 Households Assisted

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
4	New Housing Construction	2019	2023	Affordable Housing Homeless Non-Homeless Special Needs	Marion County	Essential Housing	HOME: \$1,000,000	Rental units constructed: 10 Household Housing Unit Homeowner Housing Added: 0 Household Housing Unit
5	Housing Rehabilitation/Reconstruction	2019	2023	Affordable Housing	Marion County	Essential Housing	HOME: \$500,000/CDBG: \$200,000	Homeowner Housing Rehabilitated: Household Housing Unit  Rental units constructed 10
6	Acquisition	2019	2023	Affordable Housing Homeless Non-Homeless Special Needs Non-Housing Community Development	Marion County	Essential Housing	HOME: \$1,000,000	Rental units rehabilitated: 10 Household Housing Unit
9	Tenant Based Rental Assistance and Rapid Rehousing	2019	2023	Affordable Housing Homeless Non-Homeless Special Needs	Marion County	Essential Housing	HOME: \$206,369 ESG: \$217,480	Tenant-based rental assistance / Rapid Rehousing: 15 Households Assisted  Homelessness Prevention/Persons Assisted:

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
10	Homeless Services	2019	2023	Affordable Housing Homeless Non-Homeless Special Needs	Marion County	Homelessness	ESG: \$109,605	Tenant-based rental assistance / Rapid Rehousing/outreach: 660 Households Assisted
	CDBG Slum & Blight Removal	2019	2023	Community Development	Marion County	Community Development	CDBG: \$500,000	Businesses:  Housing Units:
25	Administration	2019	2023	Administrative	Marion County	Community Development Essential Housing Homelessness	CDBG: \$436,612 HOME: \$106,235  ESG: \$12,011	

Table 3 – Goals Summary

### Goal Descriptions

1	<b>Goal Name</b>	Public Service
	<b>Goal Description</b>	<p>Assist local non-profits with funds for staff, training, materials, and equipment; to increase capacity to serve low- to moderate-income clients in Marion County, specifically those that provide housing, job skills or improve quality of life. Partner with the Community Foundation for Ocala/Marion Non-Profit Resource Center to create a source for education, best practices and management training.</p> <p>Alternate projects may include public infrastructure, Housing Rehabilitation/Demolition, Declared State of Emergency (Urgent Need), Acquisition, Non-Profit Facility, ADA compliance, and projects located in declared Opportunity Zones.</p>

<b>2</b>	<b>Goal Name</b>	Public Infrastructure
	<b>Goal Description</b>	Public utilities projects (water, sewer), neighborhood lighting, facade improvements, streets, sidewalks. Alternate projects may include public service, Housing Rehabilitation/Demolition, Declared State of Emergency (Urgent Need), Acquisition, Non-Profit Facility, ADA compliance, and projects located in declared Opportunity Zones.
<b>3</b>	<b>Goal Name</b>	Non-Profit Facility
	<b>Goal Description</b>	Assistance to non-profit agencies with facility construction/renovation. Specifically serving those agencies that provide housing, job skills and/or improve quality of life for low- to moderate-income clients and the homeless.  Alternate projects may include public infrastructure, public service, Housing Rehabilitation/Reconstruction, Declared State of Emergency (Urgent Need), Acquisition, ADA compliance, and projects located in declared Opportunity Zones.
<b>4</b>	<b>Goal Name</b>	New Housing Construction
	<b>Goal Description</b>	The development of newly constructed units for rental or owner occupied, single and multi-family units. CDBG funds will be used for acquisition, in anticipation of developing a possible partnership with a developer who may qualify as a CBDO for new construction. HOME funds will be used for new home construction. This category includes CHDO funding and projects. NSP program income funds will be used to construct new homes for sale to low- to moderate-income individuals/families.  Alternate projects may include public infrastructure, public service, Housing Rehabilitation/Reconstruction, Declared State of Emergency (Urgent Need), non-profit facility, Acquisition, ADA compliance, projects located in declared Opportunity Zones, Purchase Assistance, Tenant Based Rental Assistance, Rapid Re-Housing and Homeless Prevention.

5	<b>Goal Name</b>	Housing Rehabilitation/Reconstruction
	<b>Goal Description</b>	<p>Rental and owner occupied rehabilitation of single and multi-family units through both CDBG and HOME Consortium funding.</p> <p>Housing Rehabilitation funds may also be leveraged using State Housing Initiative Program (SHIP) funds.</p> <p>Alternate projects may include public infrastructure, public service, new housing construction, Declared State of Emergency (Urgent Need), non-profit facility, Acquisition, ADA compliance, projects located in declared Opportunity Zones, purchase assistance, Tenant Based Rental Assistance, Rapid Re-Housing and Homeless Prevention.</p>
6	<b>Goal Name</b>	Acquisition
	<b>Goal Description</b>	<p>Acquisition of housing to include but not limited to: Conversion of hotel/motel into housing and down payment assistance</p> <p>Alternate Projects to include: New Construction, Housing Rehab, TBRA</p>
9	<b>Goal Name</b>	Tenant Based Rental Assistance and Rapid Rehousing
	<b>Goal Description</b>	<p>Assistance for monthly rent, deposits and/or utilities payments for individuals and or families, both homeless and those faced with homelessness. Funds to provide housing relocation, stabilization services and short and/or medium-term rental assistance. This is necessary to help a homeless individual or family move as quickly as possible into permanent housing and achieve stability in that housing through HOME and ESG funding.</p> <p>Alternate projects may include Housing Rehabilitation/Reconstruction, Declared State of Emergency (Urgent Need), Acquisition, ADA compliance, projects located in declared Opportunity Zones, Purchase Assistance, Emergency Shelter, and Homeless Prevention</p>

10	<b>Goal Name</b>	Homeless Services
	<b>Goal Description</b>	<p>Assistance to provide housing relocation and stabilization services and short and/or medium-term rental assistance necessary to prevent an individual or family from moving into an emergency shelter or becoming homeless through ESG and HOME funds.</p> <p>Alternate projects may include Housing Rehabilitation/Reconstruction, Declared State of Emergency (Urgent Need), Acquisition, ADA compliance, projects located in declared Opportunity Zones, Purchase Assistance, Emergency Shelter, and Rental Assistance and Rapid Rehousing.</p>
	<b>Goal Name</b>	CDBG Slum & Blight Removal
	<b>Goal Description</b>	The County will allocate funding to remediate properties negatively affected by slum and blighted conditions. This will include clearance with the end goal of providing affordable housing opportunities and/or public facility improvements.
25	<b>Goal Name</b>	Administration
	<b>Goal Description</b>	Funding for staff to administer the CDBG, HOME, and ESG programs.



## AP-35 Projects - 91.420, 91.220(d)

### Introduction

The following projects are planned for the PY 2023-2024 using CDBG, HOME and ESG funding sources. The County received approximately \$15.5 mil in funding requests for CDBG, HOME and ESG. All applications were reviewed for program eligibility, scored, and ranked. The County will maintain the proposed project list and may fund projects as they become shovel ready and are consistent with the 5 Year Consolidated Plan and Action Plans.


Table 4 – Project Information

### Describe the reasons for allocation priorities and any obstacles to addressing underserved needs

Underserved needs in Marion County include the lack of affordable housing, services in rural areas, and improving coordination among organizations to the underserved population. Funding Priorities were and are made based on how organizations were going to increase and maintain affordable housing, improve homeless services, expand services within the County's rural areas, and how funds would be leverage for long term sustainability. All projects have to serve a low to moderate income population.

**AP-38 Project Summary**  
**Project Summary Information**

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<b>1</b>	<b>Project Name</b>	2023 HOME Housing Construction/Acquisition/Rehab
	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	New Construction
	<b>Needs Addressed</b>	Essential Housing
	<b>Funding</b>	HOME: \$1,000,000
	<b>Description</b>	The development of newly constructed units for rental occupied, single and multi-family units.
	<b>Target Date</b>	9/30/2026
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Marion County intends to serve approximately 10 households.
	<b>Location Description</b>	Project will be undertaken in Marion County and may include projects in City limits through its HOME Consortium.
	<b>Planned Activities</b>	Acquisition of existing single family residents, hotel/motel to include renovations as needed to increase rental housing.
<b>2</b>	<b>Project Name</b>	2023 Housing Construction/Acquisition/Rehab
	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	Acquisition
	<b>Needs Addressed</b>	Essential Housing
	<b>Funding</b>	HOME: \$1,000,000
	<b>Description</b>	Acquisition of housing to assist approximately 10 LMI households.
	<b>Target Date</b>	9/30/2025

	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Approximately 10 low to moderate income families through the Marion County HOME consortium.
	<b>Location Description</b>	Project will be undertaken in Marion County and may include projects in City limits through its HOME Consortium.
	<b>Planned Activities</b>	Housing Rehabilitation/Reconstruction
<b>3</b>	<b>Project Name</b>	2023 Housing Construction/Acquisition/Rehab
	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	Housing Rehab/reconstruction.
	<b>Needs Addressed</b>	Essential Housing
	<b>Funding</b>	CDBG: \$200,000 HOME: \$500,000
	<b>Description</b>	Rental and owner occupied rehabilitation of single and multi-family units through both CDBG & HOME Consortium funding.
	<b>Target Date</b>	9/30/2025
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Approximately 10 low to moderate income families through the Marion County HOME consortium.
	<b>Location Description</b>	Project will be undertaken in Marion County and may include projects in City limits through its HOME Consortium.
	<b>Planned Activities</b>	Housing Rehabilitation/Reconstruction. Eligibility Citation: 24 CFR Part 570. 202 (a) (1) National Objective: Low to moderate income area Matrix Code: 14A or 14B
<b>4</b>	<b>Project Name</b>	2023 CDBG Public Service
	<b>Target Area</b>	Marion County

	<b>Goals Supported</b>	Public Service
	<b>Needs Addressed</b>	Community Development
	<b>Funding</b>	CDBG: \$325,959
	<b>Description</b>	Public service projects will be focused on job creation, homeless services, financial stability and non profit capacity to expand services. Eligibility Citation: 24 CFR Part 570. 201 (e) National Objective: Low to moderate income area Matrix Code: 05H or 05Z
	<b>Target Date</b>	9/30/2024
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	22 Persons assisted
	<b>Location Description</b>	Public Service projects will occur in unincorporated portions of the County.
	<b>Planned Activities</b>	Financial sustainability projects, homeless services, expanded case management.
5	<b>Project Name</b>	Clearance & Demolition
	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	CDBG Slum & Blight Removal
	<b>Needs Addressed</b>	Community Development
	<b>Funding</b>	CDBG: 500,000
	<b>Description</b>	Funding will be used to eliminate slum and blight throughout the County. Eligibility Citation: 24 CFR Part 570. 208 (b)(2) National Objective: Slum/blight spot basis Matrix Code: 04
	<b>Target Date</b>	9/30/2024

	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	5 buildings demolished
	<b>Location Description</b>	Project will be undertaken throughout Marion County.
	<b>Planned Activities</b>	Acquisition of sites and cost of demolition.
6	<b>Project Name</b>	2023 Nonprofit facility
	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	Nonprofit Facility
	<b>Needs Addressed</b>	Community Development
	<b>Funding</b>	CDBG: 1,000,000
	<b>Description</b>	To assist non profits who serve a Low to Moderate Population and a County priority. Eligibility Citation: 24 CFR 570.201(c) National Objective: Low to moderate income Matrix Code: 03E and 03K.
	<b>Target Date</b>	9/30/2024
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	450 households assisted.
	<b>Location Description</b>	Marion County outside of the City limits City of Ocala (Serving 75% residents living outside City limits of Ocala, and/or homeless shelters)
	<b>Planned Activities</b>	Fire station in Citra and library in Silver Springs Shore.
6	<b>Project Name</b>	Public Infrastructure Weirsdale
	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	Public Infrastructure

	<b>Needs Addressed</b>	Essential Housing
	<b>Funding</b>	CDBG: 458,378
	<b>Description</b>	Infrastructure in Low to moderate income areas to improve the quality of lives for Marion County residents.
	<b>Target Date</b>	9/30/2027
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	3500 persons assisted.
	<b>Location Description</b>	Stanton Weirsdale is identified in low income census tracts.
	<b>Planned Activities</b>	Stormwater drainage project in Stanton Weirsdale.
<b>6</b>	<b>Project Name</b>	Tenant Based Rental Assistance
	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	Tenant Based Rental Assistance and Rapid Rehousing
	<b>Needs Addressed</b>	Essential Housing
	<b>Funding</b>	HOME: \$206,369 ESG: \$100,000
	<b>Description</b>	HOME TBRA is to be used in coordination with non profits who have capacity to provide rental assistance.
	<b>Target Date</b>	9/30/2024
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Approximately a total of 15 households will be served with TBRA.
	<b>Location Description</b>	Marion County and the City of Ocala through its Home Consortium
	<b>Planned Activities</b>	TBRA and Rapid Rehousing
<b>7</b>	<b>Project Name</b>	ESG 22 Marion County

	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	Homeless Prevention
	<b>Needs Addressed</b>	Homelessness
	<b>Funding</b>	ESG: \$227,085
	<b>Description</b>	ESG Project to cover ESG activities including Street Outreach, Rapid Re Housing (\$109,605), Homelessness Prevention (\$117,480).
	<b>Target Date</b>	9/30/2024
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	660 for Outreach (identifies as Other in Goal Indicator below) 5 for Rapid Rehousing 15 for Homeless Prevention
	<b>Location Description</b>	Marion County to include the Cities of: Belleview, Dunnellon, Reddick and the City of Ocala.
	<b>Planned Activities</b>	Outreach, Rapid Rehousing, and Homeless Prevention.
<b>8</b>	<b>Project Name</b>	Administration
	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	Administration
	<b>Needs Addressed</b>	Community Development Essential Housing Homelessness
	<b>Funding</b>	CDBG: \$434,612 HOME: \$106,235 ESG: \$12,011
	<b>Description</b>	Planning and Administration of CDBG and HOME funds to include Fair Housing Activities.
	<b>Target Date</b>	9/30/2024



	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	
	<b>Location Description</b>	Marion County
	<b>Planned Activities</b>	
9	<b>Project Name</b>	New Housing Construction
	<b>Target Area</b>	Marion County
	<b>Goals Supported</b>	New Housing Construction
	<b>Needs Addressed</b>	Essential Housing
	<b>Funding</b>	HOME: \$500,000
	<b>Description</b>	New Housing Construction through the HOME Consortium to include single family residents through homeownership or rental. ( The County will amend the 5 year Consolidated Plan to add goals to include new construction for rental housing)24 CFR Part 92.206National Objective: Low to Moderate income householdsMatrix Code:12 Objective: Provide decent affordable HousingOutcome: Affordability
	<b>Target Date</b>	9/30/2023
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	10 households are expected to benefit from this projec. 5 Low income 5 Moderate Income
	<b>Location Description</b>	New Construction projects will be located in Marion County and the City of Ocala through its Home Consortium.
	<b>Planned Activities</b>	New Construction of affordable housing for rental and homeownership opportunities which will meet the 15% CHDO requirement.

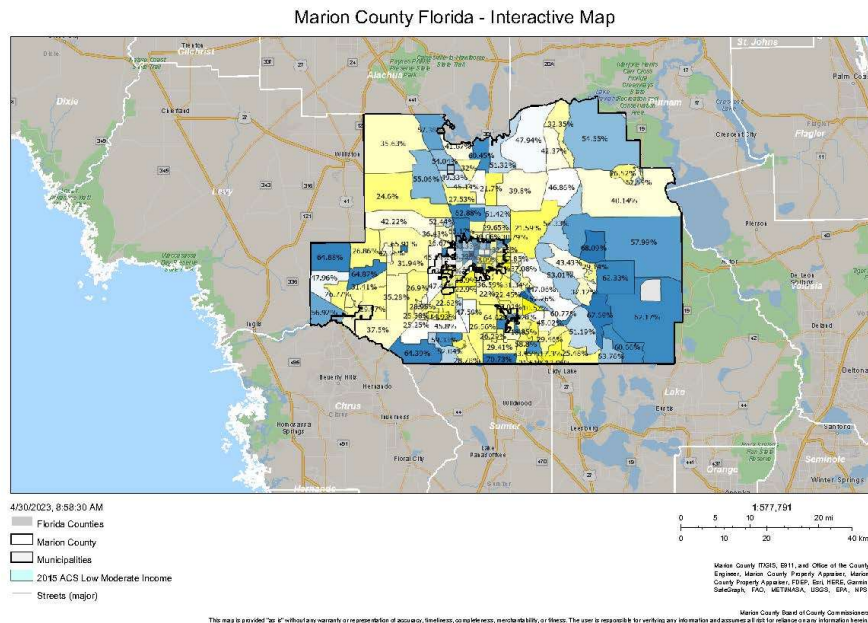
## AP-50 Geographic Distribution - 91.420, 91.220(f)

### Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

Funding will be directed to qualified low- and moderate income (LMI) census tracts, in addition to other areas indirectly through assistance to LMI households who are income qualified for program funding. All the CDBG funding (100%) will benefit LMI clientele and areas.

Neither Marion County nor the City of Ocala implement any HUD designated geographic based priority areas such as Neighborhood Revitalization Strategy Areas (NRSA) or Empowerment Zones. Marion County utilizes an application process to select eligible projects throughout Unincorporated Marion County. The County received a total of 24 funding applications for the 2023-2024 program year for a wide range of projects, including development of affordable housing, case management, and other services.

A geographic location map and low- and moderate- income (LMI) census tracts is provided below:



CPD map data demonstrates that there is a high concentration of residents who are members of racial

and ethnic minority groups within the City of Ocala.

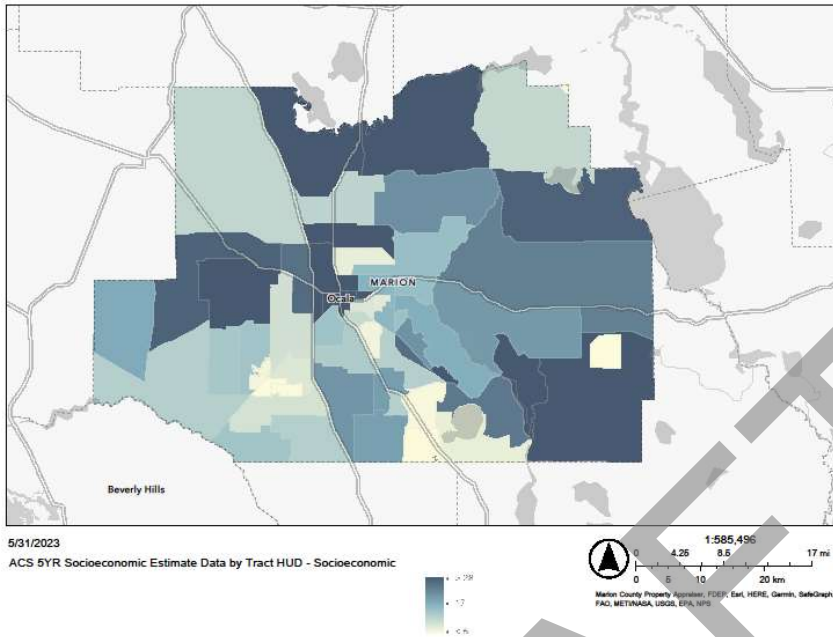
The following table provides the areas data on LMI census tracts and block groups over 51%:

Census Tract	Percent LMI
1	51.23
3.02	56.66
6.01	60.23
6.04	59.46
6.05	52.29
10.03	64.39
12.04	56.25
12.06	52.76
15.00	59.66
19.00	68.46

There are three census tracts considered Areas of Minority Concentration (more than 50% minority representation), which are the same for the County and the City. The census tracts are 15 (61% minority), 17 (60% minority), and 18 (91% minority). Some Marion County CDBG funds are expended within the city limits of Ocala on public facilities for agencies serving the county as whole when a centralized location near transportation is most important to providing services. The City of Ocala receives its own allocation of CDBG dollars. The areas of high concentration of minorities overlaps with low and moderate income census tracts. While Marion County does not allocate based on geography, all funds are expended on LMI populations. The majority of funds will be allocated in unincorporated Marion County, while a small portion may be spent to projects located in within the city limits of Ocala. See the next section for the rationale behind this allocation strategy.

According to recent (2017-2021) ACS data, the lowest income tracts were 15, 16, 17 and 18. This incorporates the west side of the City of Ocala and the west central part of the county. This is reflected

in the following map.



### Marion County Racially or Ethnically Areas of Concentrated Poverty (RECAP)

The following map identifies racially/ethnically concentrated areas of poverty (R/ECAPs) in Marion County, defined by a racial/ethnic concentration threshold and a poverty test. R/ECAPs must have a non-white population of 50 percent or more, and a poverty threshold with neighborhoods of extreme poverty containing census tracts with 40 percent or more of individuals living at or below the poverty line.

### Geographic Distribution

Target Area	Percentage of Funds
Marion County	100

Table 5 - Geographic Distribution

### Rationale for the priorities for allocating investments geographically

Marion County will allocate its CDBG funds to those geographic areas whose population is over 51% low- and moderate-income and/or to low- and moderate-income clientele. At least 70% of all the County's

CDBG funds are budgeted for activities which principally benefit low- and moderate-income persons.

The following guidelines for allocating CDBG, HOME, and ESG funds will be used by the County for the FY 2023 Program Year:

- The public services projects/activities are for social service organizations whose clientele are low-income or in certain cases, a limited type of clientele with a presumed low- and moderate-income status.
- The homeless projects/activities are for homeless agencies/organizations that serve a specific type of clientele with a presumed low- and moderate-income status.
- The other special needs projects/activities are limited to a clientele with a presumed low- and moderate-income status.
- The community and public facilities projects/activities have a low- and moderate-income service area benefit or a limited clientele which is low- and moderate-income.
- The infrastructure improvement projects/activities, must have a low- and moderate-income service area benefit or serve limited clientele who are low- and moderate-income.
- The acquisition and demolition of structures are either located in a low- and moderate-income census area or these activities are eligible by preventing or eliminating slums and blight on a spot or area basis.
- The housing projects/activities have income eligibility criteria; therefore, the income requirement limits funds to low- and moderate-income households throughout the County.
- Economic development projects/activities will either serve a low- or moderate-income area, or be located in an area where the census tracts have greater than 20% rate of poverty, may be part of a redevelopment plan, or make 51% of the jobs created/retained available to low- and moderate-income persons.
- The County allocates CDBG funds to areas or projects/activities which predominantly benefit low- and moderate-income persons to rehabilitate or construct new housing for low- and moderate-income households; to create low- and moderate-income jobs; to projects/activities that principally benefit low- and moderate-income persons; and/or slum and blight removal on a spot or area basis.
- The HOME funds will be used for administration and for housing projects/activities. These funds target low-income households and projects/activities designed to provide affordable housing to low-income households. The disbursement is based on the needs of low- and moderate-income households, not by geographic area.

Federal regulations specify that CDBG funds used for area benefit, as opposed to individual benefit, be targeted to census tracts where 51 percent or more of the population earns below 80 percent of the area median income. The target areas include those designated LMI tracts.

While the City of Ocala receives its own CDBG allocation, some Marion County CDBG funds are expended within the city limits of Ocala on public facilities for agencies serving Unincorporated Marion

County residents. This may be the case because Ocala is the economic hub of Marion County and many services are provided in Ocala that are utilized by Unincorporated Marion County residents. When a CDBG project is funded in Ocala with Marion County funds, those projects must support at least 70% unincorporated county residents. During the project scoring process, Marion County may refer a program to the City of Ocala if the project is not able to support the 70% threshold.

All HOME funds expended by Marion County and the City of Ocala are within their respective jurisdiction except for CHDO funds which are distributed cooperatively for the best project regardless of location.

### **Discussion**

The County is committed to funding projects that support unincorporated residents, specifically those LMI households.

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# Affordable Housing

## AP-55 Affordable Housing - 91.420, 91.220(g)

### Introduction

According to a recent Florida State Housing Initiatives Partnership Program (SHIP) Local Housing Assistance Plan (2022-2025), the purpose of the program in partnership with Marion County is the following:

- To meet the housing needs of the very low, low- and moderate-income households;
- To expand production of and preserve affordable housing; and
- To further the housing element of the local government comprehensive plan specific to affordable housing.

As noted in the Strategic Plan, the following strategies will be utilized to address affordable housing:

- Increase the current inventory of affordable rental properties, both single- and multi-family.
- Continue to improve the current inventory of owner-occupied single-family units through rehabilitation of major systems, including mobile homes built after 1994.
- Continue the Tenant-Based Rent Assistance (TBRA) for low-income individuals and families exiting temporary shelter to permanent affordable housing units.
- Work with a developer to plan and produce affordable rental units to seniors.
- Partner with Ocala Housing Authority to address the large waiting list by building much needed 1- and 2-bedroom rental units.
- Continue to work with County and City government to create incentives to construct new affordable housing units.

One Year Goals for the Number of Households to be Supported	
Homeless	9
Non-Homeless	22
Special-Needs	3
Total	34

Table 6 - One Year Goals for Affordable Housing by Support Requirement

One Year Goals for the Number of Households Supported Through	
Rental Assistance	15
The Production of New Units	10
Rehab of Existing Units	10
Acquisition of Existing Units	5

One Year Goals for the Number of Households Supported Through	
Total	34

Table 7 - One Year Goals for Affordable Housing by Support Type

## Discussion

Marion County and the City of Ocala's housing rehabilitation program and down payment assistance to income-qualified families, through both CDBG and HOME, has been instrumental in assisting with sustaining and acquiring affordable housing. Marion County HOME Consortium continues to build new and renovate existing single- and multi-family affordable units.

**The Marion County Purchase Assistance** Program is designed to assist home buyers with the purchase of a new or existing single-family home. Funding, may be used for down payment, closing costs, principal buy-down and repairs as needed for affordable homeownership. An eligible home is defined as an existing single-family home, to include modular, or a manufactured home built after June 1994. SHIP funds may be used in conjunction with a first mortgage loan obtained from a participating lender, not-for-profit developer, or Florida Housing Finance Corporation's Bond Program.

**The Owner Occupied Rehabilitation/Demolition-Reconstruction** program is designed to assist eligible homeowners with needed repairs, alterations, mitigation, and/or additions to improve their health, safety, and well-being or contribute to the structural integrity, long-term affordability, and preservation of their owner-occupied home. The home must be suitable for rehabilitation. Loans for assistance may include costs related to all eligible repairs, such as testing, inspections, engineering, permit fees, and abatement and pest control. If rehabilitation will exceed maximum award for rehabilitation, the homeowner may be eligible for reconstruction. Reconstruction will only be considered for eligible owners who will participate in voluntary relocation. Relocation cost will be the responsibility of the homeowner.

**New Construction -Home Ownership** One of Marion County's priorities is to increase affordable housing within the county. This strategy is designed to incentivize the development and construction of affordable housing units for sale to SHIP eligible homebuyers. Marion County will assist Sponsors with the acquisition, infrastructure, and construction costs associated with producing affordable, residential, owner-occupied housing for SHIP eligible home buyers. SHIP assistance will be repaid to the County by the developer from the proceeds of the home's sale. A portion of the County's assistance, up to \$50,000.00, may be used to assist the homebuyer with down payment assistance.

**Rental Assistance** to assist income eligible households who can pay on-going rent and utilities, but without the resources to pay first month's rent, last month's rent, and deposits and/or utilities arrearages necessary to attain affordable rental housing. This strategy will also provide rental assistance to those that are homeless or are individuals fleeing domestic violence. Maximum assistance is six months to include: payment of first month's rent, last month's rent, and deposit, utilities and



arrearages.

**Utility Assistance/Eviction prevention:** to assist income eligible households faced with utility disconnection or eviction after receiving a disconnect notice or a 3-day eviction notice and without resources to bring the account current. Maximum assistance is six months to include: payment of first month's rent, last month's rent, and deposit, utilities and arrearages.

Fair Housing Analysis of Impediments (AI) was approved by the County Commission on January 15, 2019. The AI is a comprehensive review and evaluation of Marion County's laws, regulations, administrative policies, housing market, and housing practices to determine whether any barriers (e.g. availability, affordability, and accessibility) to fair housing are present. This report can be found within the Community Services Department's resource page on the Marion County public website (Link: <https://www.marionfl.org/government/departments-facilities-offices/community-services>)

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## **AP-60 Public Housing - 91.420, 91.220(h)**

### **Introduction**

The Ocala Housing Authority (OHA) is the active Public Housing Authority (PHA) in Marion County. The Ocala Housing Authority, a certified HUD Housing Counseling Agency, manages and provides subsidized housing to 186 families through our Public Housing and Permanent Supportive Housing programs and manages 44 affordable units scattered sites throughout Marion County. The OHA serves approximately 1,511 Housing Choice Voucher (HCV) participants who utilize their vouchers through several different voucher programs: mainstream vouchers including specialty vouchers: HCV Homeownership Vouchers, Veterans Affairs Supportive Housing Vouchers (VASH), Emergency Housing Vouchers (EHV), and Family Unification Vouchers (FUP) Assistance. The Ocala Housing Authority maintain waiting lists for both the HCV program (> 3,000) and Public Housing (>2,000). OHA operates several programs to provide housing to eligible households.

- Public Housing: 186 public housing units, all located within Ocala city limits.
- Housing Choice Voucher (HCV): OHA administers 1,511 Housing Choice Vouchers throughout Marion County, that provides \$ 9 million dollars in subsidies to 600 private owners.
- Family Self-Sufficiency Program: OHA provides job training, counseling, financial coaching to meet individualized goals, along with an escrow savings plan for the participants.
- Homebuyer's Club: OHA provides services such as credit repair, budgeting, home inspections, mortgage search, navigating real estate negotiations, post-purchase training, and general mortgage education for residents of any OHA programs and the general public.

### **Actions planned during the next year to address the needs to public housing**

Public Housing Authorities in Florida are created as independent organizations under Florida Statutes. Thus, the County interfaces with the local housing authorities on activities as requested by them, and the County has contributed toward safe and sound public housing, as well as the provision of recreational and other social accommodations. The County's policy, however, is not to substitute CDBG funds for funds that are available to the Housing Authority through other Federal programs. The Ocala Housing Authority provides rental assistance to over 1,700 families in addition to 44 affordable rent units throughout the county. The Ocala Housing Authority is the only agency in the County to receive Housing Choice Voucher ("Section 8") program funding. The purpose of the Housing Choice Voucher Program and the Public Housing Program is to promote adequate and affordable housing, economic opportunity, and a suitable living environment free from discrimination. Rents associated with the federal developments are in accordance with HUD regulations and participants pay 30% of the total income of the household. This is monitored through an annual income verification to determine any income and household composition changes. Eligible applicants are those whose income is within the limits as determined by HUD.

### **Actions to encourage public housing residents to become more involved in management and**

## **participate in homeownership**

Ocala Housing Authority (OHA) is a HUD-certified housing counseling agency. OHA provides homeownership, foreclosure, credit repair, and rental housing counseling. The agency also provides information on how to become a homeowner, fair housing rights, credit counseling, and foreclosure prevention. OHA also provides the following counseling services:

- Home Improvement and Rehabilitation Counseling
- Homebuyer Education Programs
- Loss Mitigation
- Marketing and Outreach Initiatives
- Money Debt Management
- Mortgage Delinquency and Default Resolution Counseling
- Post-Purchase Counseling

The Ocala Housing Authority (OHA) operates several different programs that support residents' path toward home ownership. As mentioned above, OHA's *Homebuyer's Club* is specifically targeted at those residents that desire to pursue homeownership. The Homebuyers Club provides education and support in monthly classes held at OHA's main office on topics such as:

- Credit repair
- Budgeting
- Mortgage search
- Realtor roles and responsibilities
- Buyers' rights

## **If the PHA is designated as troubled, describe the manner in which financial assistance will be provided or other assistance**

N/A. OHA is designated as a High Performer as documented through HUD's Public and Indian Housing Information Center with its Housing Choice Voucher Program, and is a standard performer in its Public Housing Program.

## **Discussion**

## **AP-65 Homeless and Other Special Needs Activities - 91.420, 91.220(i)**

### **Introduction**

Marion County responds to the needs of people experiencing homelessness through coordination and collaborative planning with the Continuum of Care (CoC).

Through coordinated entry and strategic funding distribution to non-profit providers for direct services and assistance programs, the Ocala/Marion County Joint Office of Homelessness oversees CoC operations to rehouse homeless individuals and families, minimize trauma and dislocation experienced by the homeless population, boost utilization of mainstream programs by homeless individuals and families, and optimize self-sufficiency among individuals and families experiencing homelessness.

Marion County awards funding through a competitive process to score proposals based on their perceived ability to meet the needs of the community and achieve the goals and priority needs that the County has outlined in this Action Plan and the Five-year Strategic Plan.

### **Describe the jurisdictions one-year goals and actions for reducing and ending homelessness including Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs**

Marion County continues to build and maintain a systematic response to homelessness, utilizing the following goals to guide all actions to progress:

1. Build Board of Governors membership and engagement through member orientation content created to educate incoming leadership of the history of CoC FL-514, to include an overview of the regulatory responsibilities, program components, and more;
2. Organizing and delivering services more effectively through the expansion of outreach services with County entitlement grant dollars, the implementation of diversion practices through CoC and County entitlement grant dollars and system-wide training of program's eligible uses, case management expansion, and a central access point via low-barrier day-center;
3. Expanding coordination and partnership of supportive services at the local level by strengthening local partnerships amongst supportive service providers and mandatory use of coordinated entry procedures for services to ensure collaborative case management;
4. Educate CoC membership on the local need for permanent supportive housing, and fund scattered site leasing and subsidized affordable housing development projects for long term households with disabilities; and
5. Continued campaign lower shelter and transitional housing entry barriers.

### **Addressing the emergency shelter and transitional housing needs of homeless persons**

County and CoC funded emergency shelters work to place clients into permanent housing as quickly as

possible. The CoC utilizes emergency and transitional housing under the following principles:

1. One hundred (100%) percent of shelter beds and transitional housing comply with the Housing First model;
2. Staff are trained on trauma-informed care, basic behavioral health knowledge, and Housing First principles;
3. Case managers are trained on Housing First, housing focused case management;
4. Emergency shelter length of stay is reduced over time, measured in 6-month increments; and
5. Permanent housing placements are increased over time.
6. Maximum of two (2) shelter staff are trained to conduct the VI-SPDAT.
7. Track the number of individuals diverted from entering their program.
8. Limit the use of motel vouchers.

**Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again**

Marion County supports local agencies that offer various services to those individuals making a transition to permanent housing and independent living through Public Service agency capacity grants. Agencies such as United Way's Strong Family program offers intensive financial, job skills, and family dynamics training. Several agencies incorporate on-going case management for clients receiving rent, rapid-rehousing, and homeless prevention assistance. The goal of a shelter system is to make homelessness rare, brief, and non-recurring. The County supports service providers throughout the County using both CDBG and ESG funding, while also coordinating with the CoC to achieve this goal.

**Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs.**

Through the Joint Office on Homelessness and Marion County's HOME, SHIP and ESG grants, homeless prevention is provided to county residents at risk of losing their housing stability. In addition, the City of Ocala is lead on coordinated entry and outreach. As a result, individuals identified being discharged from public institutions are assessed and directed to appropriate resources such as shelters, hotel/motel, and housing. The coordinated entry process has aligned service providers and funding opportunities to

which has provided more efficient response to aiding low-income individuals and families at risk of becoming homeless and those that are homeless.

### **Discussion**

Still recovering from impacts of COVID-19, homelessness is a multi-faceted problem in Marion County. The CoC encourages accurate use of HMIS and conducts regular coordination meetings so service providers understand the capacity of partner agencies. County Community Services and the City of Ocala are committed to partnering with each other and all service agencies to improve the care and outcomes for those individuals and families experiencing homelessness.

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## AP-75 Barriers to affordable housing -91.420, 91.220(j)

### Introduction

Marion County prepared an Analysis of Impediments to Fair Housing Choice (AI) for the five-year period of 2019-2024.

The AI revealed the emergence and worsening of several major categories of impediments to fair housing, including but not limited to: the persisting effects and existence of redlining and other forms of systemic discrimination; the aftermath of the foreclosure and financial crises; and the concentration of indicators of low opportunity and of health risks in neighborhoods of color with a corresponding lack of housing mobility

### Strategy to Remove or Ameliorate the Barriers to Affordable Housing

The county's strategy and action for each identified impediment-developed in the 2019 AI, is included below:

#	Impediments	Actions	Timeline
1	Insufficient supply of affordable rental housing	<ul style="list-style-type: none"> <li>Collaborate with Marion County Housing Finance Authority and other organizations to help meet the affordable housing needs of all Marion County residents</li> <li>Establish a Community Land Trust and Land Bank to increase opportunity for families to access housing who have historically been left out for financial reasons</li> <li>Develop stronger relationships with private landlords and affordable housing agencies through education and funding to rent to the low/moderate income population</li> <li>Increase awareness of rental assistance programs that are available to low-income tenants</li> </ul>	2018-2024
2	Insufficient support of affordable home ownership	<ul style="list-style-type: none"> <li>Increase communication with representatives from the rural communities of Marion County</li> <li>Educate Lenders, Real Estate professionals, and residents about Fair Housing Laws</li> <li>Increase the number of affordable housing units in both Marion County and the City of Ocala</li> <li>Increase awareness of down payment assistance programs that are available to low/moderate income homebuyers</li> </ul>	2018-2024

3	Lack of awareness by residents of Fair Housing laws	<ul style="list-style-type: none"> <li>• Collaborate with the local Fair Housing Initiatives Program (FHIP) monitoring and testing to ensure Fair Housing laws are being adhered to</li> <li>• Advertise Fair Housing during the month of April and make public announcements regarding educational opportunities</li> </ul>	2018-2024
4	Poor credit history and inadequate access to employment opportunities	<ul style="list-style-type: none"> <li>• Expand access to financial credit counseling services for low/moderate income individuals and families to support better housing and employment opportunities</li> <li>• Provide training and programs related to HUD Section 3 program, to enhance opportunities for Marion County residents to increase financial sustainability</li> </ul>	2018-2024

The Affordable Housing Advisory Committee (AHAC) is an 11-member Board, appointed per Florida Statute 420.9076, to review and make recommendations regarding the established policies and procedures, ordinances, land development regulations, and adopted local government Comprehensive Plan, as they pertain to impediments to the development of affordable housing of the local governing bodies' respective jurisdictions in Marion County.

Barriers to affordable housing in Marion County include, but are not limited to:

- Low supply and high cost of existing homes
- High cost of materials to construct homes

These barriers make it difficult for the developer/builder to provide an affordable unit to the end user. In addition, Marion County's population is growing fast with 150 families moving to the area every week. Within the last five (5) years major employers such as Amazon, Chewy, and Federal Express have built satellite offices in Marion County. Employees are commuting to work from outside of Marion County due to the lack of housing supply. Similarly, many new jobs are higher paying, which further exacerbates the need for housing affordable to low- and moderate-income households.

**Actions it planned to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the**



## **return on residential investment**

The County, informed by the Affordable Housing Advisory Committee (AHAC) described above, are currently exploring ways to help mitigate barriers to help expedite the production of affordable housing such as:

- Focusing development within the County's Urban Growth Boundary and near employment hubs to assist with transportation disparity for low- to moderate-income residents;
- Review and possibly change land use and zoning near employment centers that will incentivize developers to develop near employment centers;
- Present deferred tax and impact fees to developers for multi-family development within strategic areas that will benefit low to moderate-income families and work force housing;
- Identify a point of contact to act as an affordable housing liaison to expedite the process; and
- Include Community services in the pre-development meetings between staff and developers to facilitate and expedite the development process.

## **Discussion**

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## **AP-85 Other Actions - 91.420, 91.220(k)**

### **Introduction**

The objectives, goals, planned projects, and their associated activities proposed within the Annual Action Plan are intended to meet the needs of the community. Those needs are described in the Consolidated Plan, and were confirmed to still be the priority needs based on consultations and public participation conducted for the development of the 2023-2024 Action Plan.

### **Actions planned to address obstacles to meeting underserved needs**

2020 saw one of the worst economic emergencies following months of quarantine, shuttered businesses, thousands' losing income, and a medical crisis from the COVID-19 pandemic. Since March 2020, priorities shifted to assisting those to prepare for, and recover from, the loss of income, keeping the homeless sheltered, and finding shelter for those living in inadequate conditions. Assisting both non- and for-profit businesses to retain employees and keep good and services in place became a major goal.

Through the HUD allocated CARES Act funding, payments and programs such as the Payroll Protection Plan, Income Tax payments and increased unemployment, funds will be distributed throughout Marion County. Using CDBG-CV, HOME and ESG-CV waivers will enable Marion County Consortium to make changes to the Citizen Participation Plan to distribute funds quickly to meet the changing needs.

However, the needs that existed before the health crisis remain and must be addressed. Through its ongoing CDBG, HOME and ESG programs, the County and City will continue to fund projects that will improve the lives of the neediest of Marion County citizens.

The County and City continue to utilize its CDBG, HOME, and ESG funds to the fullest extent to assist in meeting underserved needs. Leveraging efforts with public and private funding agencies were also made to supplement federal funds and increase the resources available to address community needs.

### **Actions planned to foster and maintain affordable housing**

Marion County will continue to commit its core programs to foster and maintain affordable housing by providing:

- Housing for Veterans, First Responders, and Educators
- Assist Very Low- and Low-income homebuyers with repairs to maintain housing stock as safe

- and decent housing
- Create additional units of affordable rentals, especially one- and two-bedroom units

Marion County does not anticipate the loss of any existing units from the assisted housing inventory.

Marion County uses ESG and, with the City of Ocala, use HOME and CDBG funds to implement various programs that assist in maintaining affordable housing including creating homeownership opportunities and bringing homes up to code through rehabilitation efforts.

At this time, and over the last year, there are no plans for removal of any public housing units. Marion County and the City of Ocala continue to work with the local Housing Authority, as well as other nonprofits, to develop and increase affordable housing options. In addition to dealing with the Housing Authority directly, the County remains committed to assisting and facilitating conversations between government agencies, nonprofit agencies, for-profit agencies, and the Housing Authority.

### **Actions planned to reduce lead-based paint hazards**

Marion County will continue educational efforts to inform residents of lead-based paint hazards in general. In particular, all CDBG, HOME and ESG Program housing assistance program participants will receive specific notice regarding lead-based paint hazards and all contractors will be required to adhere to lead-based paint safe work practices before, during, and after all home improvement projects.

Marion County consults with the Marion County Health Department to review lead-based paint hazard data, educate the public and mitigate housing units in which lead has been found. Property statistic reports are pulled for all housing projects to determine the year of construction. If the year of construction is 1978 or earlier, an inspector certified in lead paint assessment completes the testing for the presence of lead and provides the homeowner with the U.S. Environmental Protection Agency (EPA) Lead Awareness brochure. To date, none of the housing projects in Marion County have tested positive for lead, although the City of Ocala has had some lead abatement activity. The Grant Administrator who oversees the HOME TBRA program is certified in the visual inspection for lead paint.

The rehabilitation program offered through the City of Ocala assists in reducing lead-based paint hazards by focusing on code compliance. The City ensures staff are appropriately trained in lead-based paint, pamphlets are distributed, inspections and assessments are conducted when required, and contractors trained in lead safe practices are used. Marion County is planning to fund lead-based paint hazards training to pertinent staff to better address this issue as it pertains to housing renovation/repairs as well as capital projects.

All rehabilitation activities follow HUD regulations concerning lead-based paint assessment and any necessary interim controls. The first step is counseling and/or informing the rehabilitation client of the danger of lead-based paint when they apply for assistance. Staff determines at this interview whether

there is heightened risk due to young children in the household.

### **Actions planned to reduce the number of poverty-level families**

Marion County continues to award CDBG Public Service funding to agencies that offer case management and service programs to very low- and low-income households. These programs will provide support for a Housing First program through ESG. It is a priority to focus on case management services that work towards achievable personal and household goals to help reduce the number of Marion County families living below the poverty level. Services such as employment support or job training, paired with financial support will increase short-term household stability so the household may take steps towards achieving long-term stability.

Marion County requires homeowner Purchase Assistance clients to attend financial training to work towards both financial sustainability and the purchase of a home.

### **Actions planned to develop institutional structure**

Marion County's Community Services Department will continue as the Consortium Collaborative Applicant with regard to planning and implementation of programs and activities noted in the 5 Year Strategic Plan and each Annual Action Plan.

Marion County's Housing and Community Development Plan will be carried out through a combination of public, private and non-profit organizations, many of which participate in the citizen participation process.

Marion County and City of Ocala staff will continue to play active roles in the community organizations dealing with homelessness, children's issues, mental health, veterans' services, senior services, and community issues.

The Community Services Department will consult with the Ocala Housing Authority concerning consideration of public housing needs and any planned program activities. Consultation will help ensure that all proposed activities that are directed towards increasing affordable housing, neighborhood improvement, and/or any resident programs and/or services funded by the Ocala Housing Authority will increase the quality of life of all participating parties.

Further, the City of Ocala Community Development Services Department coordinates with various public, private, and non-profit agencies. Collaboration between local, county, and state agencies is imperative to successfully carry out the goals and objectives identified in the Consolidated Plan and addressing community needs. Areas of coordination will include broadband and Wi-Fi access to underserved areas; evaluation of flood prone areas; emergency evacuation routes; availability of fire/rescue services; and determination of effect on natural and environmental resources. It is essential that both the City of Ocala and Marion County foster and maintain partnerships with other public and

private agencies for the successful delivery of their Housing and Community Development programs.

### **Actions planned to enhance coordination between public and private housing and social service agencies**

Several steps are taken to ensure coordination between public and private housing and social service agencies during the program year. Each of these steps will help facilitate information exchange between the County, City, and those providing public services. The following steps are taken to enhance coordination amongst agencies:

Technical assistance is offered to all sub-recipients to educate them on the grant funds, application process, eligible uses, additional requirements when utilizing these funds and long-term conditions on their use.

- A Lenders' Consortium was created to assist first-time homebuyers by protecting them against predatory lending and establish a relationship with our local lenders. The Lenders Consortium meets twice a year to discuss issues.
- Marion County and City of Ocala created the Joint Office on Homelessness to become the lead agencies working with the CoC to draft, teach, and implement policies and procedures impacting people and families experiencing homelessness.
- The Community Foundation of Marion County launched the Nonprofit Resource Center in 2019 to provide services to Marion County nonprofits. Through communication with various funding agencies in the area, the Resource Center learned that many nonprofits needed capacity building to attain their mission. The Resource Center created a Strategic Planning process, led by highly skilled leaders, and is offering it to nonprofits.

### **Discussion**

# Program Specific Requirements

## AP-90 Program Specific Requirements - 91.420, 91.220(I)(1,2,4)

### Introduction

Marion County follows HUD program regulations and federal statutes for its federally funded programs through CDBG, HOME, and ESG. Marion County's priority focus with CDBG, HOME, and ESG is Essential Housing, Job retention/creation, Infrastructure that supports Affordable Housing, services, and housing for the homeless. One hundred (100%) percent of CDBG funds are used for activities that benefit low- and moderate-income persons.

### Community Development Block Grant Program (CDBG) Reference 24 CFR 91.220(I)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed	0
2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan.	0
3. The amount of surplus funds from urban renewal settlements	0
4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan	0
5. The amount of income from float-funded activities	0
<b>Total Program Income:</b>	<b>140,000</b>

### Other CDBG Requirements

1. The amount of urgent need activities	0
2. The estimated percentage of CDBG funds that will be used for activities that benefit persons of low and moderate income. Overall Benefit - A consecutive period of one, two or three years may be used to determine that a minimum overall benefit of 70% of CDBG funds is used to benefit persons of low and moderate income. Specify the years covered that include this Annual Action Plan.	100.00%

**HOME Investment Partnership Program (HOME)  
Reference 24 CFR 91.220(l)(2)**

1. A description of other forms of investment being used beyond those identified in Section 92.205 is as follows:

No other forms of investment will be used.

2. A description of the guidelines that will be used for resale or recapture of HOME funds when used for homebuyer activities as required in 92.254, is as follows:

The Consortium uses the Recapture provision in all HOME mortgages and liens for the direct subsidy received by the homebuyer. Purchase Assistance is provided directly to the qualified homebuyer as a soft second, deferred payment, zero interest loan. The lien document includes HOME affordability period requirements and HUD recapture language and formula. While Marion County uses the entire amount (limited to the net proceeds available from the sale) of loan for recapture, the City of Ocala offers a pro-rated reduction of the recapture funds during the affordability period.

The fully executed (by all applicable parties) and dated Loan Agreement, Promissory Note and Mortgage and Warranty Deed will serve as the security for these loans. The Mortgage and Warranty Deed will also be recorded in the land records of Marion County, Florida. The repayment of the Homeowner Rehabilitation Program Promissory Note is made solely from the net proceeds of sale of the Property (except in the event of fraud or misrepresentation by the Borrower described in the Promissory Note).

A subsequent resale of the property during the HOME Affordability Period is limited to a buyer whose family qualifies as low-income according to the annual Income Limits Adjusted to Family Size for Marion County and there are no additional HOME assistance funds provided. The recapture provisions are in effect for a period of affordability. This period is based on the amount of direct

HOME subsidy to the buyer (recapture), as follows:

Amount of HOME funds-direct subsidy to buyer (recapture) / Period of Affordability

Under \$15,000 / 5 years

\$15,000 to \$40,000 / 10 years

Over \$40,000 / 15 years

All new construction / 20 years

(See attached Provisions in Consolidated Plan)

3. A description of the guidelines for resale or recapture that ensures the affordability of units acquired with HOME funds? See 24 CFR 92.254(a)(4) are as follows:

Marion County's HOME Consortium uses a recapture provision according to 24 CFR92.254 requiring repayment upon sale, refinancing for cash out, or if the unit assisted is no longer the homeowner's primary residence. If the homeowner defaults on the loan voluntarily or by operation of law, including, but not limited to, death of the surviving mortgage holder or foreclosure, the minimum HOME affordability will prevail. Under these circumstances, the HOME investment amount will be recaptured from net proceeds. Marion County's enforcement mechanism is a recorded deferred mortgage placed on the property assisted at time of closing. (See attached Provisions in Consolidated Plan)

4. Plans for using HOME funds to refinance existing debt secured by multifamily housing that is rehabilitated with HOME funds along with a description of the refinancing guidelines required that will be used under 24 CFR 92.206(b), are as follows:

None

### **Emergency Solutions Grant (ESG)**

1. Include written standards for providing ESG assistance (may include as attachment)

See attached ESG Standards in the attachments.

2. If the Continuum of Care has established centralized or coordinated assessment system that



meets HUD requirements, describe that centralized or coordinated assessment system.

The City of Ocala/Marion Continuum of Care FL-514, generally referenced as the "CoC" is the Governing body, and the Coordinated Intake and Assessment Committee, referenced as the "CIAC" is composed of representatives of relevant service organizations that plan for and provide assistance to people experiencing homelessness. Service delivery includes rapid re-housing and homeless prevention through emergency, transitional, and permanent housing strategies for persons who are homeless or at-risk of becoming homeless in Marion County, Florida. This committee serves as the decision-making body for the process under the CoC as required by the Continuum Interim Rule, to establish and operate a Coordinated Intake and Assessment Service Delivery system. Please see the attached CoC Coordinated Entry Policy and Procedure Manual, in the Unique Appendices. This is a working document undergoing necessary updates as the Committee sees fit.

The CoC funds the employment of an HMIS Coordinator, through the Joint Office on Homelessness. The HMIS Coordinator works with various service providers to ensure that they are both utilizing the HMIS software and inputting the appropriate information into the software. All agencies affiliated with the CoC utilize HMIS to track clients, ensure clients are receiving appropriate services, and prevent duplication of services between local agencies.

3. Identify the process for making sub-awards and describe how the ESG allocation available to private nonprofit organizations (including community and faith-based organizations).

Marion County's Community Services Department will work with the Joint Office on Homelessness on strategies to better provide re-housing services for individuals and families experiencing homelessness as well as persons residing in shelters. The County will grant sub-awards to qualifying not-for-profit agencies with demonstrated experience in providing services to individuals experiencing homelessness. The County's process for making sub-awards includes:

- Posting an advertisement of a "Notice to Interested Applicants" for a formal application was place in the Ocala Star Banner
  - Reviewing applications to determine an organization's experience, financial soundness, and capacity to serve persons experiencing homelessness
  - Notifying qualifying agencies for submittal of proposal
  - Reviewing proposals and scoring by a review committee
  - Awarding funding to selected agencies
4. If the jurisdiction is unable to meet the homeless participation requirement in 24 CFR 576.405(a), the jurisdiction must specify its plan for reaching out to and consulting with homeless or formerly homeless individuals in considering policies and funding decisions regarding facilities and services funded under ESG.

Marion County and the City of Ocala are the Ocala/Marion Joint Office on Homelessness and

coordinates with CoC in the development of the ESG programs. The CoC Board intentionally added a seat and added a board member to the board of governors who was formerly homeless. The CoC Board votes on policy and funding decisions that affect ESG. In addition, as part of the CoC there are formerly homeless individuals who participate in the CoC membership meetings and provide consultation that allows for other considerations in making decisions as it relates to solving homelessness with ESG funds.

5. Describe performance standards for evaluating ESG.

Marion County has contracted with local homeless service providers to identify and determine the eligibility of potential clients. The agencies are monitored on their performance as County staff process applications from these agencies and through on-site monitoring. To date, the agencies have been performing proficiently. Case management services are monitored through monthly reports from the agencies. Client performance is monitored through monthly reports. Agency contracts require the agencies to follow-up with clients for one (1) year after graduating from the program.

Marion County Community Services will consult with the Marion County Continuum of Care to revise already developed Performance Standards that meet the goals of the program. At a minimum, selected agencies must meet the following standards:

- Have trained or adequate staffing to deliver the proposed service or activity.
- Must have overall organizational strength, including :Established record keeping methods, filing system. Financial systems. Must have written procedure manuals for financial management and personnel. Must have trained staff to provide case management and counseling. The ESG monthly process is as follows:

1. Technical support is offered monthly or as needed.
2. All payment request invoices submitted are checked for accuracy - Rent, Deposits, Utilities, Case Management, etc.
3. All Case Management notes are read, and fees paid monthly for all ESG clients. Sub-recipient accomplishments will be updated in IDIS as activities are completed and closed out.

Community Services ESG grants assist community homeless providers with funding to provide services to their clients. Rapid re-housing, homeless prevention, and outreach funds are used to assist individuals experiencing unsheltered and sheltered homelessness. Permanent supportive housing continues to be a need in the community and is being addressed by the County and the CoC.

As required by 24 CFR § 576.100, Marion County does not expend more than 7.5% of the annual ESG allocation for planning and administrative costs. The amount spent on Street Outreach and Emergency Shelter activities does not exceed 60% of the fiscal year allocation or the amount of FY

2010 funds for homeless assistance activities.

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