

CR-05 - Goals and Outcomes

Progress the jurisdiction has made in carrying out its strategic plan and its action plan. 91.520(a)

This could be an overview that includes major initiatives and highlights that were proposed and executed throughout the program year.

This Consolidated Annual Performance Evaluation Report "CAPER" covers the period from October 1, 2014 to September 30, 2015 which represents the first year of the City of Ocala's 2014-2018 Consolidated Plan. The City of Ocala is an entitlement grantee of the U.S. Department of Housing and Urban Development "HUD" for Community Development Block Grant "CDBG" funds. The City of Ocala participates in the Marion County HOME Consortium, of which Marion County is the lead agency responsible for the management of the HOME funds.

The City has a large stock of older housing that is need of repairs. These goals were met by a first come first qualified basis. The City was able to maintain a waiting list in which most of the applicants on the waiting list were assisted. Below are the objectives and outcomes addressed during the 2014-2015 fiscal year:

1. **Objective** - Affordability for purpose of creating suitable living environments:

- **Strategic Goal:** 165 housing units will provide decent affordable housing through rehabilitation improvements for the purpose of creating a suitable living environment.
- **Annual Performance Measure:** To rehabilitation 33 sub-standard owner-occupied housing units for the purpose of providing suitable living environments to low income households.
- **Outcome:** 42 owner-occupied homes were preserved to provide a suitable living environment.

2. **Objective** - Sustainability for the purpose of creating suitable living environments

- **Strategic Goal:** Demolish 10 buildings/structures causing hazardous conditions and the acquisition of 1 property to be used for housing and community development needs.
- **Annual Performance Measure:** To demolish 2 uninhabitable buildings/structures and provide 1 new energy efficient home to provide sustainability to a low income household with assistance from two partnering non-profit organizations.
- **Outcome:** 1 blighted structure removed and 1 suitable living environment provided.

Comparison of the proposed versus actual outcomes for each outcome measure submitted with the consolidated plan and explain, if applicable, why progress was not made toward meeting goals and objectives. 91.520(g)

Categories, priority levels, funding sources and amounts, outcomes/objectives, goal outcome indicators, units of measure, targets, actual outcomes/outputs, and percentage completed for each of the grantee’s program year goals.

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Housing Improvements	Affordable Housing	CDBG: \$	Homeowner Housing Rehabilitated	Household Housing Unit	165	42	25.45%	33	42	127.27%
Planning and Administration	planning and administration	CDBG: \$	Other	Other	1	1	100.00%	1	1	100.00%
Quality of Life	Affordable Housing Non-Housing Community Development	CDBG: \$	Buildings Demolished	Buildings	10	2	20.00%	2	2	100.00%
Quality of Life	Affordable Housing Non-Housing Community Development	CDBG: \$	Other	Other	1	0	0.00%			

Table 1 - Accomplishments – Program Year & Strategic Plan to Date

Assess how the jurisdiction's use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan, giving special attention to the highest priority activities identified.

The City of Ocala's highest priority with CDBG expenditures was assisting low income families with housing rehabilitation by providing safe decent housing. The City of Ocala has a large housing supply of older homes that are in need of preservation. The City of Ocala allocated CDBG funds based on a first come, first qualified basis to provide housing rehabilitation assistance to 42 owner occupied, low to moderate income families. Five of the 42 homes rehabilitated received full rehabilitation which averaged a cost of \$30,000.00 each. The remaining of the homes were assisted as emergency repairs that were classified as life- safety issues such as roof leaks, unsafe electrical service, and lack of water or sewer. The emergency repairs averaged a cost of \$3,500.00 each. Two of the homes were determined dilapidated/unsafe and it was necessary to demolish and re-construct safe-standard living for two low income families.

CR-10 - Racial and Ethnic composition of families assisted

Describe the families assisted (including the racial and ethnic status of families assisted).

91.520(a)

	CDBG
White	4
Black or African American	37
Asian	0
American Indian or American Native	0
Native Hawaiian or Other Pacific Islander	1
Total	42
Hispanic	1
Not Hispanic	41

Table 2 – Table of assistance to racial and ethnic populations by source of funds

Narrative

See attached Map

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG		1,803,812	378,580

Table 3 – Resources Made Available

Narrative

The City of Ocala is an entitlement community for CDBG, is a member of the Marion County HOME consortium, and also receives State Housing Initiative Partnership Funds (SHIP). The City received \$450,953 in CDBG, \$160,085 in HOME and \$282,401.00 in SHIP funds for Fiscal Year 2014. The City has completed 42 CDBG projects, two HOME projects under construction, and has completed four SHIP projects in fiscal year 2014. The City is on schedule to meet the goals set forth for CDBG, HOME and SHIP funds.

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
City of Ocala	100	100	see map

Table 4 – Identify the geographic distribution and location of investments

Narrative

The City of Ocala serves the entire City limits of Ocala. The listed ethnic and racial populations assisted with CDBG funds represent the populations served throughout the neighborhoods.

Leveraging

Explain how federal funds leveraged additional resources (private, state and local funds), including a description of how matching requirements were satisfied, as well as how any publicly owned land or property located within the jurisdiction that were used to address the needs identified in the plan.

The City of Ocala Rehabilitation programs are funded using a combination of both CDBG and SHIP funds so that a greater number of people can be assisted. The City works closely with Community Action Agency weatherization program to maximize the amount of assistance provided to housing rehabilitation applicants which reduces the CDBG/ SHIP rehab cost and allows the program to assist more people. In addition, the City of Ocala's Water and Sewer Department received grant funds from the Florida Department of Environmental Protection and the Saint Johns River Water Management District to connect residents to sewer allowing the City to assist fourteen additional residents with sewer connections.

CR-20 - Affordable Housing 91.520(b)

Evaluation of the jurisdiction's progress in providing affordable housing, including the number and types of families served, the number of extremely low-income, low-income, moderate-income, and middle-income persons served.

	One-Year Goal	Actual
Number of Non-Homeless households to be provided affordable housing units	10	0
Total	10	0

Table 5 – Number of Households

	One-Year Goal	Actual
Number of households supported through rental assistance		
Number of households supported through the production of new units		
Number of households supported through the rehab of existing units	33	42
Number of households supported through the acquisition of existing units		
Total		42

Table 6 – Number of Households Supported

Discuss the difference between goals and outcomes and problems encountered in meeting these goals.

The City of Ocala continues to work on meeting goals identified in the 2014-2018 Consolidated Plan. Goals for Program Year 14/15 were either exceeded or very close to being met. The City has not drawn all funds through the end of the 2014 reporting year. However, all projects are on schedule to expend the remaining funds.

Discuss how these outcomes will impact future annual action plans.

The City’s demolition/re-construction program will be re-considered because the total cost of reconstruction and relocation is limiting the number of people the city can assist. In addition ,the City plans on ammending the 5 year consolidated plan and future action plans to enable assistance to public facility and infrastructure projects.

Include the number of extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine

the eligibility of the activity.

Number of Persons Served	CDBG Actual	HOME Actual
Extremely Low-income	26	0
Low-income	10	0
Moderate-income	6	0
Total	42	0

Table 7 – Number of Persons Served

Narrative Information

CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)

Evaluate the jurisdiction's progress in meeting its specific objectives for reducing and ending homelessness through:

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The City of Ocala did not identify a homeless strategic goals or objectives in the 5 year consolidated plan. However, the City of Ocala plan on amending the 5 year consolidated plan to include activities to fund public facilities which may serve the homeless. In addition the City of Ocala participates in the Marion County Homeless Council Continuum of Care (CoC). The CoC continues to recruit non-profit and faith-based organizations, healthcare agencies and appropriate government agencies into the CoC Network of Services. In 2014 the CoC focused on establishing a Coordinated Intake and Assessment System (CIA). The City encourages the agency to keep its contact information and services updated on the Marion County Homeless Council's website at www.mchcfl.org and with United Way's 211 system. As part of this process, the CoC is coordinating with United Way's 211 system to serve more areas.

Addressing the emergency shelter and transitional housing needs of homeless persons

The Marion County Homeless Council is the lead agency addressing homeless needs in Marion County, which includes the City of Ocala. The housing needs of homeless persons and families cannot be completely met by emergency shelters and transitional housing due to the lack of capacity. Marion County and the Marion County Homeless Council receive ESG funding to use for rapid rehousing and homeless prevention activities. This helps create availability in a shelter for another individual or family. The City of Ocala's Board of Adjustment approved the expansion of the Salvation Army Center of Hope to relocate its kitchen and dining space into a former unused chapel allowing them to create additional shelter space. This expansion is being funded through Marion County's CDBG funds. Renovation of the vacated space for the shelter is funded with private funds. The City of Ocala is working closely with Marion County Homeless Council and Marion County to address the housing needs of homeless persons.

Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: likely to become homeless after 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); and, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs

Those being discharged from institutions/systems of care that are likely to be homeless may be referred to these agencies that may provide assistance with housing, health, social services, employment, education or youth needs. The City of Ocala has the following prevention services in place.

- Faith-based organizations and churches provide emergency food and financial assistance.

- Community Legal Services provides representation in eviction, foreclosures, and public housing proceedings.
- Marion County Homeless Council provides mortgage, rental, and utility assistance including relocation and motel/hotel placement.
- Ocala Housing Authority provides consumer credit counseling and housing re-modification to existing mortgages.
- Neighborhood Housing Development Corporation provides consumer credit counseling and mortgage modifications.
- CareerSource provides job development and prepares participants for job search; provides counseling; identifies job skills and assists in preparation of resume writing and interview skills.
- ARC Marion provides retraining for persons with documented disabilities.
- Department of Children and Families provides economic services, including; TANF, food Stamps, Medicaid, challenge grant, grant-in-aid for homeless shelters, and plans and coordinates direct services.
- Community Action Agency provides financial assistance of utility payments.
- Marion County School Board connects families with community services to prevent homelessness and provides breakfast and weekend backpack meals for homeless students identified at the beginning of the school year.
- First Call for Help (211) provides free information and referral services linking the caller with the agency, organization or program that may best help to meet their needs.
- United Way of Marion County provides unity between local resources and Marion County residents.
- Experience Works provides retraining job opportunities for senior residents 55 and over.
- Marion County Veteran services provides training, healthcare and outreach services for local veterans

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

The best tools currently in this jurisdiction are the Rapid Re-housing and Homeless Prevention programs administered by Marion County and Marion County Homeless Council which is funded through the Emergency Solutions Grant (ESG). In addition, there are two local veteran assistance programs with Supportive Services for Veteran Families fund. The Marion County Homeless Council provides ESG funds to families with children. Marion County helps anyone with rapid rehousing and homeless prevention through the Marion Homeless Council, Project Hope of Marion County, and Shepherds Lighthouse. The Rapid Rehousing clients receive case management to ensure self-sufficiency. After the client graduates from the rapid re-housing program the organizations follow the client a year after "graduation" to prevent future homelessness.

CR-30 - Public Housing 91.220(h); 91.320(j)

Actions taken to address the needs of public housing

The Ocala Housing Authority (OHA) has been serving the City of Ocala, Marion County for over six decades by providing affordable housing opportunities to its residents and is the only agency in the City and County to receive Section 8, housing assistance program funding. In addition to assisting 1,356 very low-income families, veterans, seniors, and persons with disabilities through its Housing Choice Voucher (HCV), aka Section 8, rental subsidy program, they are responsible for four (4) housing complexes containing 186 Public Housing units, as well as 40 market-rate units scattered throughout the city. According to the U. S. Department of Housing and Urban Development (HUD), Ocala Housing Authority is categorized as a Small public housing authority, which means the OHA manages between 50 - 249 public housing units. Also according to HUD, the housing authority is designated as Large Agency as it pertains to its HCV program, because it administers 1,250 - 9,999 Section 8 vouchers.

As a HUD-Certified Housing Counseling Agency since 2000, the OHA administers an active mortgage foreclosure intervention (MFI) program that provides counseling services and financial assistance to families facing foreclosure of their residence. The OHA serves as the administrator of the state of Florida Hardest Hit Housing (FHHS) Program in Marion County. The FHHS program provides 12 months of mortgage assistance to families who are delinquent with their mortgage because of unemployment, underemployment, death, disability, or divorce. The program also provides assistance for delinquent mortgage accounts.

Recognizing the need for homeownership opportunities, the OHA expanded its programs through the introduction of new homeownership initiatives in 2005. During FY 99 the OHA demolished two of its public housing complexes through a HOPE VI Demolition grant, Forest View (74 units) and Dr. N. H. Jones (56 units). The Forest View vacant parcel was used for the development of the Ocala Housing Authority's Homeownership initiative in *Paradise Trails*, a 28-unit single-family subdivision.

Actions taken to encourage public housing residents to become more involved in management and participate in homeownership

The OHA has been a HUD certified housing counseling agency since 2000. and was recertified in 2006 and awarded grant funds to continue services as a HUD certified housing counseling agency. The OHA provides the following counseling services:

- Home Improvement and Rehabilitation Counseling;
- Homebuyer Education Programs ;
- Loss Mitigation ;
- Marketing and Outreach Initiatives;
- Mobility and Relocation Counseling;

- Money Debt Management;
- Mortgage Delinquency and Default Resolution Counseling;
- Post-Purchase Counseling;
- Pre-Purchase Counseling;
- Renters Assistance; and
- Services for Homeless.

The OHA has an active Family Self Sufficiency (FSS) program that serves approximately 100 of its Public Housing and HCV program participants, enabling the families to earn a matching escrow stipend while working towards economic self-sufficiency. The OHA also offers the Homebuyers Club and Homeownership counseling programs. These programs assist Section-8 participants and residents of the public housing communities in becoming economically self-sufficient and attain homeownership.

The OHA maintains ongoing resident initiatives. Resident Councils are active in each of the OHA's Public Housing communities where meetings are held on a bimonthly basis. Guest speakers keep residents abreast of new programs and opportunities. An OHA staff person attends all meetings as a liaison. A representative from the Ocala Police Department attends all meetings to assist with Neighborhood Watch Programs.

Residents receive a monthly newsletter/calendar that includes vital OHA information, updates from HUD, and local community information. Public Housing staff walk through each community on a regular basis to maintain a visible presence on site and in an effort to increase customer service.

Actions taken to provide assistance to troubled PHAs

As you can see the below internet link notes that the OHA is a combined (low rent/section 8) HA and has a noted performance status as being a "High Performer". Perhaps update your narrative to indicate you checked the website and the OHA status is noted as "High Performer" there for does not require assistance as a troubled HA.

<https://pic.hud.gov/pic/haprofiles/haprofileddetails.asp>

CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)

Actions taken 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. 91.220 (j); 91.320 (i)

The City of Ocala has established sufficient public policy regarding affordable housing. However, the City continues to re-evaluate policies to ensure they do not interfere with affordable housing efforts. In addition, the City of Ocala's Affordable Housing Advisory Committee (AHAC) is currently meeting to update and review barriers that may affect affordable housing. The AHAC established a list of recommendations to present to City Council for the promotion of affordable housing.

Actions taken to address obstacles to meeting underserved needs. 91.220(k); 91.320(j)

The most significant obstacle to addressing the needs of homeless citizens is the lack of available funding. The jurisdiction receives Supportive Housing Program funds, FEMA funds and financial resources from the Department of Families and Children to assist residents with mortgage, rent and utility assistance. The City of Ocala has been referring city residents to Neighborhood Housing Development Corporation for financial counseling to assist them in financial sustainability

Actions taken to reduce lead-based paint hazards. 91.220(k); 91.320(j)

The City of Ocala performs lead-based paint test on all homes built prior to 1978 that are receiving rehabilitation. If lead is identified, then a certified contractor whom is certified in Lead Mitigation is hired to abate any lead –based paint hazard. In addition, the homeowner receives the Environmental Protection Agency pamphlet regarding Lead-Based Paint Hazards.

Actions taken to reduce the number of poverty-level families. 91.220(k); 91.320(j)

Through the use of CDBG, HOME, SHIP and the local Affordable Housing fund, the City's strategy is to continue revitalizing neighborhoods to provide a better quality of life to residents by demolishing slum and blight and preserving substandard housing. The City will refer residents to Community Action Agency, who will assist low income residents with electric bill payments and weatherization to their home which may reduce their electric bill. In addition many of the City's low income applicants are required to meet with a financial counselor through Neighborhood Housing Development Corporation to provide them with tools to obtain financial sustainability.

Actions taken to develop institutional structure. 91.220(k); 91.320(j)

The City of Ocala's Revitalization Strategies Department coordinates with many of the City departments to assist with streamlining processes and reducing barriers to develop affordable housing projects. In addition the Revitalization Strategies Department participates with the Marion County Homeless Council (CoC), Marion County Community Services, Ocala Housing Authority, Habitat for Humanity of Marion County,

Career Source, and Neighborhood Housing Development Corporation on an on-going basis to share resources and ideas to find ways to leverage resources to maximize assistance to those in need. Also the City participates in the Governors West Ocala Revitalization Neighborhood Council meetings to listen to the concerns in the community and assist with solutions for improvements to the West Ocala community.

Actions taken to enhance coordination between public and private housing and social service agencies. 91.220(k); 91.320(j)

The City of Ocala was successful with the coordination of a Youth Build project which involved Career Source, Habitat for Humanity of Marion County and 19 at risk youth. The City of Ocala provided SHIP funds for the materials of the home, CareerSource provided the education to the 19 at risk youth and Habitat for Humanity taught the at-risk youth construction skills while building the home for a low income resident. In addition the Ocala Police Department refers some of the at risk youth to CareerSource for application to the youth build program and in return the Ocala Police Department assists with the expungement of any criminal records for the youth.

Identify actions taken to overcome the effects of any impediments identified in the jurisdictions analysis of impediments to fair housing choice. 91.520(a)

The Marion County Home Consortium is currently updating the Analysis of Impediment to fair housing choice. In addition the Affordable Housing Advisory Committee began meeting June 2015 to identify barriers to affordable housing. The Committee is requesting: new zoning classification to allow for development on smaller lot sizes, liaison to expedite development and permitting processes for affordable housing, reducing impact fees, examine the increase to the cost of housing before local government passes a rule, and to support development near transportation hubs and major employment centers.

CR-40 - Monitoring 91.220 and 91.230

Describe the standards and procedures used to monitor activities carried out in furtherance of the plan and used to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

City of Ocala did not fund any public service or public facility project in 2014. The City of Ocala provides direct benefit to low income households. However, progress and compliance with program requirements is monitored of these rehabs through the following process and all households are income qualified prior to services rendered. Files are maintained for each household for five years after the liens are released.

The City also ensures long term compliance with applicable program requirements such as for the following: Collaboration between departments occurs to keep expenditure of CDBG fund within the City's vision. Timeliness of expenditures is monitored through financial tracking through IDIS. In addition, minority business outreach is obtained through opportunities made available for MBE-WBE through the city's procurement process and this participation data is obtained through the city's Trakit system and reports submitted to HUD. The City also solicits for Section 3 businesses through the procurement process; however many of the contractors hired already have established employees and do not need to acquire additional employees to perform the projects. Formally the Federal Cash Transaction Report now known as the SF425 is reported quarterly by the City of Ocala to HUD.

In furtherance the City's Con. Plan and Annual Action Plans program goals and objectives are monitored at a minimum of quarterly through the review of IDIS activities and IDIS comprehensive data reports for activity progress and meeting financial requirements all of which contributes to the evaluation of the comprehensive planning process in evaluating future adjustments if applicable based on results.

Citizen Participation Plan 91.105(d); 91.115(d)

Describe the efforts to provide citizens with reasonable notice and an opportunity to comment on performance reports.

The City of Ocala's 2014 Action Plan was presented at the Governors West Ocala Neighborhood Revitalization Council (GWONRC) meeting on April 8, 2014 and the meeting notice was published in the local newspaper and through the City of Ocala's Clerk office. James Haynes presented the plan to GWONRC, no comments were received and a motion to vote for support of the plan was approved. The 2014 Action plan was then presented to City Council and approved on July 15, 2014.

The 2014 CAPER was advertised November 30, 2015 in the local newspaper and a public hearing was held on December 18, 2015 at the Citizens Service Center for public comment. Also the CAPER was made available to review at 201 SE 3 Street(2nd Floor) and a draft was published to the City of Ocala's website at:

http://www.ocalafl.org/uploadedFiles/Development_Services/Revitalization_Strategies/CAPER%20DR AFT%20%202014-2015.pdf.

No comments were received.

CR-45 - CDBG 91.520(c)

Specify the nature of, and reasons for, any changes in the jurisdiction’s program objectives and indications of how the jurisdiction would change its programs as a result of its experiences.

The City of Ocala Revitalization Strategies Department has begun the advertisement process for a substantial amendment to the 2014-2019 Consolidated Plan to include Public Facility and Infrastructure Projects in the future. In addition to preserving the substandard housing stock with use of CDBG, HOME and SHIP, the city would like to offer assistance to non-profits that also serve the low income population. By expanding the CDBG activities the City hopes to serve a larger low to moderate income population and help prevent and reduce homelessness.

Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?

No

[BEDI grantees] Describe accomplishments and program outcomes during the last year.