

# Osceola County Housing Finance Authority Performance Measures/Standards & Annual Reporting Form

October 1, 2025 – September 30, 2026

## **1. Public Communication and Engagement**

### **Goal 1.1: Public Meetings Compliance**

**Objective:** Hold at least three regular meetings per year to conduct Authority related business and discuss community needs.

**Measurement:** Number of public board meetings held annually as evidenced by meeting minutes and legal advertisements.

**Standard:** A minimum of three board meetings were held during the Fiscal Year.

**Achieved:** Yes  No

### **Goal 1.2: Notice of Meetings Compliance**

**Objective:** Provide public notice of meetings in accordance with Florida Statutes, using at least two communication methods.

**Measurement:** Timeliness and method of meeting notices as evidenced by posting to the County website (Osceola.org), publishing in local newspaper and via electronic communication.

**Standard:** 100% of meetings were advertised per Florida statute on at least two mediums (i.e., newspaper, website, electronic communications).

**Achieved:** Yes  No

### **Goal 1.3: Access to Records Compliance**

**Objective:** Ensure that meeting minutes and other public records are readily available and easily accessible to the public by contacting the Authority Manager's office during normal business hours to request records.

**Measurement:** Monthly website reviews will be completed to ensure meeting minutes and other public records are up to date as evidenced by Authority Management's records.

**Standard:** 100% of monthly website checks were completed by Authority Management.

**Achieved:** Yes  No

## **2. Affordable Housing Compliance**

### **Goal 2.1: Compliance Management Occupancy Reporting and/or Site Inspections**

**Objective:** Compliance Monitoring Agent t, or a designee, will conduct Management review and Physical inspections of multifamily developments projects per bond

restrictive covenants. Compliance Monitoring Agent will review monthly reviews of occupancy submitted by owners, in accordance with the Florida Housing Finance Corporation standards

**Measurement:** Compliance management visits were successfully completed and monthly reports for occupancy reviewed per Compliance Monitoring Agreement as evidenced by Compliance Manager's reports, notes or other record keeping method. For Rural Development projects, compliance reports were received in accordance with the federal program requirements. Any noted compliance issues were rectified by stated deadlines.

**Standard:** 100% of site visits were successfully completed as described within Compliance Monitoring Agreement and any compliance issues were rectified by stated deadline.

**Achieved:** Yes  No

### **3. Financial Transparency and Accountability**

#### **Goal 3.1: Facilitate Issuance of Multifamily Revenue Housing Bonds for Affordable Housing in accordance with Part IV, Chapter 159, Florida Statutes.**

**Objective:** Select bond counsel, bond underwriters, credit underwriters and other necessary professionals (that have been selected via RFQ by the state Florida Housing Finance Corporation), prepare and approve the associated documents necessary to issue such bonds dedicated to financing affordable multi-family housing in Osceola County.

**Measurement:** Authority collected applicable fees and reviewed the proposed project(s) prior to initiating the bond process. TEFRA Hearings were noticed and held accordingly. Financing team, including but not limited to, Bond Counsel, Credit Underwriter, and Compliance Monitoring Agent were selected by the Authority to prepare the appropriate inducement and delegation resolutions, credit underwriting reports, and ancillary documents. Authority adopted/approved the documents to close and issue bonds for the construction of the project(s).

**Standard:** 100% approved project(s) completed the bond approval and closing process in accordance with statutory deadlines and requirements.

**Achieved:** Yes  No

#### **Goal 3.2: Processing of Disbursements**

**Objective:** Have funds appropriately disbursed to authorized vendors pursuant to the Custody of Funds Agreement with Osceola County.

**Measurement:** Vendors send invoice to be added to disbursement for approval by the Authority and signed by the Authority Chairman and Secretary and sent to County Chief Financial Officer for processing and disbursement of funds.

**Standard:** Authority approved and processed 100% of the disbursements submitted in the Fiscal Year.

**Achieved:** Yes  No

**Goal 3.3: Deposit of Funds**

**Objective:** Deposit funds received for the Authority in a timely manner.

**Measurement:** Timeliness funds deposited as evidenced by correspondence showing type of disbursement and bond issuance transmitted to the County Chief Financial Officer for deposit.

**Standard:** All checks received in the Fiscal Year by Authority Manager’s office were transmitted to the County Chief Financial Officer and deposited into the Authority’s bank account.

**Achieved:** Yes  No

**Goal 3.4 Annual Audit Information**

**Objective:** Provide information to Osceola County financial staff, as requested, for county annual audit.

**Measurement:** Timeliness of response(s) to county staff.

**Standard:** All inquiries and requests from Osceola County for financial information were timely provided.

**Achieved:** Yes  No

Chair/Vice Chair: \_\_\_\_\_  
Print Name: \_\_\_\_\_  
Osceola County Housing Finance Authority

Date: \_\_\_\_\_

Authority Manager: \_\_\_\_\_  
Print Name: \_\_\_\_\_  
Osceola County Housing Finance Authority

Date: \_\_\_\_\_