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

October 1, 2026 – September 30, 2027

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.

Measurement: Vendors send invoice(s) to the Authority Manager's Office 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 of funds deposited as evidenced by the check register.

Standard: All checks received in the Fiscal Year by Authority Manager's office were deposited into the Authority's bank account.

Achieved: Yes ☐ No ☐

Goal 3.4 Annual Audit Information

Objective: Conduct an annual independent financial audit per statutory requirements and publish the results to the Authority's website for public inspection, and transmit to the State of Florida.

Measurement: Timeliness of audit completion and publication as evidenced by meeting minutes showing Board approval and annual audit is available on the Authority's website and transmitted to the State of Florida.

Standard: Audit was completed by an independent auditing firm per statutory requirements and results were posted to the Authority website and transmitted to the State of Florida.

Achieved: Yes ☐ No ☐

Chair/Vice Chair:_____ Date:_____
Print Name:_____
Osceola County Housing Finance Authority

Authority Manager:_____ Date:_____
Print Name:_____
Osceola County Housing Finance Authority