

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.

In 2011, the City of Sarasota and Sarasota County prepared a joint Consolidated Plan that examined needs throughout Sarasota County. For the first 2 years of the five year Consolidated Plan, one Action Plan, for both the City and County was submitted. Beginning in 2013, HUD required the City of Sarasota and Sarasota to submit separate Action Plans and separate Consolidated Annual Performance Evaluation Reports (CAPER) even though the City and County administer a joint housing and community development program. This CAPER includes data furnished by HUD that places all of the HOME funds in the City's report, even though funds are largely used in the County and reports all of the ESG funds in the County, even though some of the funds are used to assist homeless individuals and families without a permanent location - meaning they may spend some or most of their time in the city. Housing units assisted with State Housing Initiatives Partnership Program funds are reported in the jurisdiction where they were used.

During the 2015-2016 program year, the City of Sarasota completed phase II-A of the Myrtle Street project. This project included reconstructing the street, new sidewalks, drainage improvements and lighting. This project included 2 years of CDBG funds and will benefit approximately 12,255 residents, the vast majority are very low income.

The City also paid for 1/2 of the cost of additional individual working on the Homeless Outreach Team (HOT) using CDBG funds. The HOT team made over 10,000 individual contacts with chronically homeless individuals. As a result, 564 entered the HOT team beds at the Salvation Army and 332 individuals requested additional social services.

Six low income youths were hired for summer employment to supervise low income children at the Robert L. Taylor community center.

The City of Sarasota is the lead entity for the HOME Consortium. A total of 80 families received assistance with HOME funds.

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
2013 Goal - CHDO Funding	Affordable Housing		Homeowner Housing Rehabilitated	Household Housing Unit	5	0	0.00%			
2013 Goal - Fair Housing	Fair Housing		Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	75	84	112.00%			
2013 Goal - Fair Housing	Fair Housing		Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	0	0				
2013 Goal - Homeless Prevention	Homeless		Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	27				
2013 Goal - Homeless Prevention	Homeless		Homeless Person Overnight Shelter	Persons Assisted	0	0				

2013 Goal - Homeless Prevention	Homeless		Overnight/Emergency Shelter/Transitional Housing Beds added	Beds	0	0				
2013 Goal - Homeless Prevention	Homeless		Other	Other	5	0	0.00%			
2013 Goal - North County Homeless Shelter	Homeless		Homeless Person Overnight Shelter	Persons Assisted	10	0	0.00%			
2013 Goal - Owner-Occupied Rehabilitation	Affordable Housing		Homeowner Housing Rehabilitated	Household Housing Unit	250	12	4.80%			
2013 Goal - Summer Youth Program	Non-Housing Community Development		Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	60	7	11.67%			
2014 Goal - CHDO Funding	Affordable Housing		Homeowner Housing Added	Household Housing Unit	0	0				
2014 Goal - Fair Housing	Affordable Housing		Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	64				
2014 Goal - Fair Housing	Affordable Housing		Other	Other	0	0				

2014 Goal - Homeless Prevention	Homeless		Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	0	0				
2014 Goal - Infrastructure Improvements	Non-Housing Community Development		Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	0				
2014 Goal - Owner-Occupied Rehabilitation	Affordable Housing		Homeowner Housing Rehabilitated	Household Housing Unit	0	1				
2014 Goal - Summer Youth Program	Non-Housing Community Development		Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	6				
CHDO Funding	Affordable Housing	HOME: \$98121	Homeowner Housing Added	Household Housing Unit	0	0		1	0	0.00%
Fair Housing	Affordable Housing	CDBG: \$10000	Other	Other	0	0		1	0	0.00%
Homeless Prevention	Homeless	CDBG: \$25000	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	526		0	526	
Homeless Prevention	Homeless	CDBG: \$25000	Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	0	0		100	0	0.00%

Homeless Prevention	Homeless	CDBG: \$25000	Homeless Person Overnight Shelter	Persons Assisted	0	90		0	90	
Infrastructure Improvements	Non-Housing Community Development	CDBG: \$221583	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	12560		12255	12560	102.49%
Owner-Occupied Rehabilitation	Affordable Housing	CDBG: \$52326 / HOME: \$648105 / SHIP: \$270000	Homeowner Housing Rehabilitated	Household Housing Unit	0	2		45	2	4.44%
PY13-CHDO Funding	Affordable Housing		Homeowner Housing Added	Household Housing Unit	0	1		0	1	
Summer Youth Program	Non-Housing Community Development	CDBG: \$24000	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	6		10	6	60.00%

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 major priority for this year was the completion of the Myrtle Street project. That priority was met during the year.

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	HOME
White	424	73
Black or African American	71	7
Asian	2	0
American Indian or American Native	1	0
Native Hawaiian or Other Pacific Islander	0	0
Total	498	80
Hispanic	0	12
Not Hispanic	498	68

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

Narrative

Because the City of Sarasota is the recipient of the HOME funds, the numbers above include all Sarasota County residents assisted with HOME dollars.

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			614,151
HOME			1,297,628
Other	SHIP	0	

Table 3 - Resources Made Available

Narrative

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Newtown Neighborhood	59	68	Myrtle Street Improvements and Summer Youth Employment

Table 4 – Identify the geographic distribution and location of investments

Narrative

The funds that are shown as benefitting the Newtown Neighborhood includes the Myrtle Street Improvements and the Summer Youth that were residents of the Newtown Neighborhood.

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 Sarasota used \$641,203 in CDBG funds for the Myrtle Street improvements. This leveraged an additional \$5,216,378 in other funding.

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	966,219
2. Match contributed during current Federal fiscal year	0
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	966,219
4. Match liability for current Federal fiscal year	171,372
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	794,847

Table 5 – Fiscal Year Summary - HOME Match Report

Match Contribution for the Federal Fiscal Year								
Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Foregone Taxes, Fees, Charges	Appraised Land/Real Property	Required Infrastructure	Site Preparation, Construction Materials, Donated labor	Bond Financing	Total Match

Table 6 – Match Contribution for the Federal Fiscal Year

HOME MBE/WBE report

Program Income – Enter the program amounts for the reporting period				
Balance on hand at begin-ning of reporting period \$	Amount received during reporting period \$	Total amount expended during reporting period \$	Amount expended for TBRA \$	Balance on hand at end of reporting period \$
383,190	284,565	137,371	51,085	530,384

Table 7 – Program Income

Minority Business Enterprises and Women Business Enterprises – Indicate the number and dollar value of contracts for HOME projects completed during the reporting period						
	Total	Minority Business Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Contracts						
Dollar Amount	385,819	0	0	0	0	385,819
Number	39	0	0	0	0	39
Sub-Contracts						
Number	79	0	0	0	0	79
Dollar Amount	287,414	0	0	0	0	287,414
	Total	Women Business Enterprises	Male			
Contracts						
Dollar Amount	365,819	19,850	345,969			
Number	39	2	37			
Sub-Contracts						
Number	79	6	73			
Dollar Amount	287,414	14,386	273,028			

Table 8 – Minority Business and Women Business Enterprises

Minority Owners of Rental Property – Indicate the number of HOME assisted rental property owners and the total amount of HOME funds in these rental properties assisted						
	Total	Minority Property Owners				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Dollar Amount	0	0	0	0	0	0

Table 9 – Minority Owners of Rental Property

Relocation and Real Property Acquisition – Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition						
Parcels Acquired		6		436,378		
Businesses Displaced		0		0		
Nonprofit Organizations Displaced		0		0		
Households Temporarily Relocated, not Displaced		0		0		
Households Displaced	Total	Minority Property Enterprises				White Non-Hispanic
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	
Number	0	0	0	0	0	0
Cost	0	0	0	0	0	0

Table 10 – Relocation and Real Property Acquisition

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 Homeless households to be provided affordable housing units	14	11
Number of Non-Homeless households to be provided affordable housing units	46	63
Number of Special-Needs households to be provided affordable housing units	0	8
Total	60	82

Table 11 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	14	11
Number of households supported through The Production of New Units	1	5
Number of households supported through Rehab of Existing Units	45	65
Number of households supported through Acquisition of Existing Units	0	1
Total	60	82

Table 12 – Number of Households Supported

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

The goals included all projects in the City and County. The actual is the number produced in the City of Sarasota and HOME funds in the county.

Discuss how these outcomes will impact future annual action plans.

The 2016 - 2021 Consolidated Plan will use the automated system throughout the process and the proposed and actual goals will be in alignment.

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	0	23
Low-income	2	21
Moderate-income	0	38
Total	2	82

Table 13 – Number of Persons Served

Narrative Information

The 2016 - 2021 Consolidated Plan will use the automated system throughout the process and the proposed and actual goals will be in alignment.

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 Sarasota created two Homeless Outreach Teams (HOT Teams) to reach out to homeless persons. The HOT teams have made approximately 10,000 individual contacts and there were 564 nights of service in shelters. The HOT teams develop an individual plan for each homeless individual family who are then referred to social service agencies who work with the families to implement those action plans. While the community has made great progress in creating and implementing a coordinated assessment system for families, a similar system for chronic individuals does not exist. There is a lack of funding at the state level to treat mental health needs.

Addressing the emergency shelter and transitional housing needs of homeless persons

The City of Sarasota currently funds 20 emergency shelter beds at the Salvation Army and local motels. This is an increase of 10 beds. The Salvation Army has a total of 248 shelter beds. Harvest House has renovated 14 housing units on Dr. Martin Luther King Jr. Way that will provide additional housing for homeless families.

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

Sarasota has an exceptionally strong homeless prevention system in place, especially for families. In large part funded by private donations, the Season of Sharing and other foundations, nonprofit agencies are able to respond to families in need quickly and efficiently. The privately funded system has been so successful that the city and county have been able to eliminate their federally funded homeless prevention funding and reallocate those funds to increase the number of permanent supportive housing units. The City of Sarasota provided funding to the Sarasota Y to assist unaccompanied youth or youths graduating out of foster care with affordable housing. The program provides housing assistance to young people who are attending school and who have part time employment.

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

During the past year, Sarasota has allocated City CDBG and State Housing Initiatives Partnership (SHIP) funding to create additional permanent supportive housing units. Additional City CDBG funds have been allocated for additional units in 2017. The Jewish Family and Children's Services (JFCS) has been awarded funding to administer a program to assist homeless veterans. Approximately 100 homeless veterans from the City of Sarasota were housed. JFCS reports that they are close to reaching functional zero when addressing veteran homelessness.

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

Actions taken to address the needs of public housing

During the program year, the Sarasota Housing Authority completed construction of Janie's Garden Phase III. This third and final phase created 72 additional affordable housing units. The three phases, in total, created 226 units of new, affordable rental housing. The City contributed \$4,632,972 from various funding sources towards the \$44,138,775 total project cost.

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

The Sarasota Housing Authority has helped six of its Housing Choice Voucher participants to become homeowners in the past 12 months. Two of the applicants received assistance from Sarasota.

Actions taken to provide assistance to troubled PHAs

The Sarasota Housing Authority is not a troubled agency.

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)

In 2016, the City of Sarasota appointed a citizen committee to review public policies that served as barriers to affordable housing. The committee examined established policies and procedures, ordinances, land development regulations and policies in the adopted comprehensive plan and recommended specific actions or initiatives to encourage or facilitate affordable housing. The committee recommended to the City Commission that they continue meeting in 2016 – 2017.

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

One obstacle to meeting underserved needs is the lack of income in the Newtown Neighborhood, including public services to meet those needs. In 2016, the City of Sarasota and Sarasota Memorial Hospital announced plans to create a 6,000-square-foot outpatient clinic for adults in the underserved Newtown neighborhood. The \$2.2 million project is part of Sarasota Memorial Hospital's new internal residency program, which it announced in April through a partnership with Florida State University College of Medicine. The first 10 residents are expected to arrive in the summer of 2017, and the clinic will serve as their training ground.

An obstacle to meeting the needs of the chronic homeless is the lack of additional permanent supportive housing. Both State Housing Initiatives Partnership (SHIP) and City CDBG funds were budgeted to create additional permanent supportive housing units.

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

As part of its rehabilitation activities, the Sarasota Consortium provides all applicants using both federal and state rehabilitation funds with a brochure describing the hazards of lead base paint. Homes build prior to 1978 are inspected for the presence of lead and a risk assessment is conducted as needed. When lead is found, remedial action is taken at no cost to the homeowner.

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

Sarasota has taken action to reduce poverty in the Newtown Community with the creation of the North

Sarasota Workforce Initiative. This initiative represents a strategic alliance among the City, County, Sarasota School Board, Sarasota Housing Authority, Suncoast Workforce, construction companies, and the community.

The goal is to work together to improve economic development and quality of life throughout the Newtown-North Sarasota community by creating job and training opportunities for local area residents. Toward this end, the local community has made a commitment to hire local low-income residents on large construction projects, created construction training courses, a business resource center, and even a business entrepreneur training class for low-income residents.

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

The City of Sarasota and Sarasota County have formed a consortium to jointly administer its CDBG, HOME, ESG and SHIP funding. It works with numerous nonprofit housing providers to develop and rehabilitate housing. Each of the nonprofit providers receive a developer's fee when a home is completed and sold to an eligible buyer to develop administrative capability.

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

Sarasota County formed the Human Services Advisory Council (HSAC) to enhance coordination between social service agencies, including housing agencies. The HSAC meets monthly and brings together agencies, county and municipal representatives and housing agencies to discuss topics of mutual concerns, inform each other of activities that are being undertaken and coordinate service responses. The City of Sarasota is a member of HSAC.

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 latest Analysis of Impediments to Fair Housing identified a total of 31 recommendations. Of the 31, 10 were ongoing tasks that are completed each year. The remaining 21 are tasks that were to be completed by 2020. Of the 21 tasks, 15 have been completed. See Attachment 1.

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

The primary project that was completed in 2015-16 was the Myrtle Street reconstruction project. There were monthly meetings held with city and county staff to monitor the progress of the project and to make sure that it was completed on time.

Funds were also awarded to a nonprofit agency to create additional permanent supportive housing units. A meeting with the agency was conducted to go over the federal requirements and the process that would be used by the city to monitor performance. No properties had been purchased as of September 30, 2016. Bi-weekly phone calls are conducted with the subrecipient and OHCD staff to monitor the progress of the project.

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 publically advertised that the performance report was available for review and comment on November 28, 2016. In addition, notices were sent to each individual and agency that participated in the development of the 2016 – 2021 Consolidated Plan, neighborhood organizations and other interested parties. The draft report was placed on the OHCD website for 15 days and 2 public meetings were conducted to discuss the performance report. One meeting was held in north county and one in south county.

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.

City and County CDBG funds, state and local funds were used to reconstruct Myrtle Street. Myrtle Street passes through both the City and the unincorporated county. OHCD coordinated monthly project meetings with city and county staff throughout the planning and construction to coordinate the project. The first phase of the project is now complete.

The City originally allocated funding to create a homeless shelter. A site suitable to the city was not identified and the funding has been reallocated to develop additional permanent supportive housing units. The city has embarked on a housing first strategy with the ultimate goal of providing housing for the chronic homeless in the community.

None of the projects that are currently funded are behind schedule. The city met the timeliness standard in 2015.

Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?	No
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[BEDI grantees] Describe accomplishments and program outcomes during the last year.

CR-50 - HOME 91.520(d)

Include the results of on-site inspections of affordable rental housing assisted under the program to determine compliance with housing codes and other applicable regulations

Please list those projects that should have been inspected on-site this program year based upon the schedule in §92.504(d). Indicate which of these were inspected and a summary of issues that were detected during the inspection. For those that were not inspected, please indicate the reason and how you will remedy the situation.

The City has not assisted rental units. As a result, there are no units that are required to be inspected on an annual basis.

Provide an assessment of the jurisdiction's affirmative marketing actions for HOME units. 92.351(b)

The HOME program requires that affirmative marketing steps be used for rental projects containing 5 or more units. No rental projects of 5 or more units were assisted during 2011 – 2016 with HOME funds.

OHCD encourages the use of minority and women-owned businesses; however, homeowners are free to select their own contractor to perform rehabilitation work subject to cost reasonableness standards. While OHCD has an Affirmative Marketing Plan, it has not constructed more than five units in one project that would require compliance with this regulation.

Refer to IDIS reports to describe the amount and use of program income for projects, including the number of projects and owner and tenant characteristics

Program income was used to construct 5 Habitat for Humanity Homes. The projects are currently under construction.

Describe other actions taken to foster and maintain affordable housing. 91.220(k) (STATES ONLY: Including the coordination of LIHTC with the development of affordable housing). 91.320(j)

The Sarasota Consortium has used State Housing Initiatives Partnership Program funds to create additional affordable rental units. Those units have long term affordability attached to the units and preserve the affordability of rental housing.

Table 1
Analysis of Impediments to Fair Housing Choice - Progress Report September 30, 2016

Goals	Strategies to Meet Goals	Responsible Entities	Benchmark	Status
Increase Homeownership opportunities among minority households	Fund a pilot program aimed at providing job training services to residents of public housing and other subsidized housing developments	OHCD, SHA, job training organizations & other affordable housing providers	Number of minority households assisted	Complete
	If funding becomes available, the County should consider reinstating the Down Payment Assistance Program and target 20-25% of these funds toward minority households	OHCD	Funds allocated toward down payment assistance number of households assisted	Complete
	Adopt and implement SHA's draft Section 3 Plan	OHCD	City and County Resolutions adopting Section 3 Policy or other documentation that policy was implemented	Complete - County adopted Section 3 Plan on June 5, 2012. City adopted Section 3 Plan on May 21, 2012
	The City County should include funding for affordable housing specifically the SHIP program in its annual list of legislative objectives	OHCD, City of Sarasota & Sarasota County	Copy of annual list of legislative priorities; documentation list was sent to elected officials	Ongoing requirement - Completed for 2016 - City included the policy in its legislative priorities County sent letter of support
Increase the supply of decent, affordable housing throughout the county	Continue to make affordable housing investments in both impacted and non-impacted areas	OHCD	Maps highlighting the distribution of affordable housing investments	Ongoing requirement - Completed for 2016
	Prepare and adopt a Neighborhood and Site Selection Policy for the HOME Program	Consortium	Documentation that policy was approved and implemented	To be completed in 2017
	Increase existing multi-family requirements from 25 units per acre to 40 units per acre	Sarasota County	Documentation that the requirement was changed	Complete - County Planning has determined the concept is not feasible.

Goals	Strategies to Meet Goals	Responsible Entities	Benchmark	Status
Amend SHA Policies and policy documents to be in compliance with all applicable federal laws and authorities.	Develop a Section 504 Needs assessment and Transition Plan to achieve compliance with accessibility regulations	SHA	Documentation that needs assessment and transition plan was completed.	Assessment complete. The transition plan is being prepared.
	Conduct the four-factor analysis to determine the extent to which the translation of vital documents is warranted	SHA	Results of four-factor analysis.	Analysis complete. The analysis showed that there was no need for additional translations.
	Engage in programs to expand economic opportunity for LMI Black households, i.e. adopt and implement the draft Section 3 plan that connects public housing residents to jobs, place clients in job training programs provided by SHA or another entity, promote SHA self-sufficiency programs, and work with local business, including the new Wal-Mart to ensure that SHA clients are given priority for job opportunities	SHA	Number of Black LMI households assisted	Ongoing - The SHA continues to partner with the Sarasota County Technical Institute and the Suncoast Workforce Board to equip residents and place them into jobs.
	Conduct an examination of rent reasonableness to ensure that payment standards are consistent with local market trends	SHA	Documentation that study was completed and standards adjusted, if applicable	Complete. The SHA uses a software program that determines rent reasonableness for each unit.
	Amend the grievance policy to specify that SHA will make reasonable accommodations for persons with disabilities	SHA	Documentation that policy was amended	Complete - Policy Amended.

Goals	Strategies to Meet Goals	Responsible Entities	Benchmark	Status
Improve processes for allocating and reporting of entitlement funds to ensure compliance with applicable laws and regulations.	Initiate a Fair Housing Log to record activities undertaken throughout the year to affirmatively further fair housing	OHCD	Copy of Fair Housing Log	Ongoing requirement - Completed for 2016
	Map the addresses of all new affordable housing investments in CAPER	OHCD	Copy of Map in CAPER	Ongoing requirement - Completed for 2016
	Amend the HOME Affirmative Marketing Plan so that it also explicitly applies to CDBG-assisted housing with five or more units and add a statement that provides examples of corrective actions that will be pursued if owners do not fulfill requirements	OHCD	Documentation that amendments to policy were made	Completed
Support fair housing education and outreach programs and conduct real estate testing to reduce housing discrimination	Continue to advertise the services of the City's Human Relations Board in ways especially directed towards members of the protected classes	OHCD, HRB	Proof advertisements placed in area media outlets	Completed
	Consider revisions to the local fair housing complaints process to remove potential barriers to filing complaints	HRB	Documentation that process was amended, if applicable	Completed
	Continue to invest in fair housing education and outreach	OHCD	Documentation of funds allocated for education and outreach	Ongoing requirement - Completed for 2016 - The CDBG Subrecipient Agreements were changed to require all subrecipients to place a fair housing poster in their lobby. CDBG funds paid to obtain and frame the posters.

Goals	Strategies to Meet Goals	Responsible Entities	Benchmark	Status
Support fair housing education and outreach programs and conduct real estate testing to reduce housing discrimination (Cont.)	Contract with a qualified fair housing organization to conduct real estate testing at least bi-annually. Test for race, disability and familial status particularly among minority households	OHCD	Documentation of executed contract and testing results	Completed
	Explore the feasibility of forming a bi-county fair housing agency with Manatee County	OHCD	Sign in sheets from meetings	Complete – Manatee County is not interested in pursuing a bi-county fair housing agency.
Ensure that members of the protected classes are represented on appointed boards and commissions dealing with housing issues.	Conduct a study of each of the appointed citizens who are currently members of appointed boards with a housing function to identify members of the protected classes	City Auditor and Clerk; County Administration	Copy of Survey	Completed.
	Annually schedule a recruitment period for new applicants with an emphasis on outreach to members of the protected classes.	City Auditor and Clerk; County Administration	Documentation of recruitment efforts	Ongoing requirement - Completed for 2016 - The City and County receive applications on a periodic basis when vacancies occur or when terms expire. Both the City and County post vacancies on the website and send e-mails to local neighborhood associations that include members of the protected classes.
Ensure that OHCD's LAP complies with all applicable laws and regulations	Revise the LAP to include more detailed information including points of contact in the County, what agencies and staff members are bilingual and can provide interpreter services and who is eligible and qualified to interpret.	OHCD	Copy of Revised LAP	To be undertaken in FY 2017

Goals	Strategies to Meet Goals	Responsible Entities	Benchmark	Status
Ensure that local zoning ordinances are in compliance with the Fair Housing Act	Voluntarily maintain the new procedure it established under the DOJ settlement for handling request for determining which properties are group homes.	Sarasota County	Documentation that procedure was maintained	Ongoing requirement - Completed for 2017
	The County, the City of Venice and the City of North Port should amend their respective zoning ordinances to remove locational restrictions on group homes.	Sarasota County, City of North Port, City of Venice	Documentation that zoning ordinances were amended	Sarasota and Venice are complete. The amendment will be included in the North Port Zoning update.
	Refer complaints of false advertising by non-registered communities to an investigatory agency such as HUD or FCHR.	OHCD, Sarasota County, City of Sarasota, City of North Port, City of Venice	Documentation of referral process	Ongoing requirement - Completed for 2016.
Increase access to public transit options for minority and LMI households	Provide SCAT with the local financial assistance needed to meet its system transformation goals.	Sarasota County	Documentation of funds provided to SCAT	Completed - the number of routes serving the protected classes was increased.
	Local jurisdictions should implement the establish action steps as outlined in their respective comprehensive plans to prioritize transit-oriented development as a means of providing affordable housing with access to employment centers, services and amenities.	Sarasota County, City of Sarasota, City of North Port, City of Venice	Documentation that action steps were taken.	The City of Sarasota hired a consultant to update the zoning code and a review of the density along transit routes will be a part of that study. To be completed in 2017.

Goals	Strategies to Meet Goals	Responsible Entities	Benchmark	Status
Increase and enhance fair housing outreach and education efforts throughout the county.	Investigate the feasibility of contracting for mortgage testing in the County. If possible, contract with an experienced firm to conduct such testing	OHCD, City of Sarasota, Sarasota County	Documentation of feasibility analysis and copy of executed contract, if applicable	To be completed in 2017.
	Encourage HUD-approved homebuyer counseling providers to continue this invaluable service for lower income and minority households.	OHCD, City of Sarasota, Sarasota County	Sign-in sheets from homebuyer counseling sessions	Ongoing requirement - Completed for 2016 - Funding for homebuyer counseling services was provided by the City of Sarasota and Sarasota County in both FY 13 and 14.
Eliminate discriminatory language in real estate advertisements.	Write letters to local newspaper editors informing them of their fair housing obligations as they relate to real estate advertising.	OHCD, HRB	Copies of letters mailed to local newspapers	Completed