

Approved Authority Goals and Objectives

With Success Metrics - 2026/2027

1. Secure safety and soundness of organization

Goal 1.1: Identify risks

- **Objective:** To identify risks to Authority business in order to take appropriate action to prevent loss in assets, and loss of information that might endanger private information of those using Authority services.
- **Measurement:** Performance of Risk Analysis at Audit Committee or Board meeting as evidenced by meeting minutes.
- **Standard:** A minimum of one Risk Analysis performed.
- **Achieved:** Yes ☐ No ☐

Goal 1.2: Emphasize Authority Board and Team ethics, fraud awareness, and professional development

- **Objective:** To insure top-down climate of ethics and compliance and avoid legal risk.
- **Measurement:** Board and Team Training opportunities annually.
- **Standard:** Scheduled Board and Team continuing education trainings.
- **Achieved:** Yes ☐ No ☐

2. Foster housing markets that promote equitable access to affordable and sustainable housing

Goal 2.1: Advance equity in housing finance, including education and compliance with fair lending/housing laws

- **Objective:** To make affordable housing happen.
- **Measurement:** Prioritize and streamline Authority Team development and outreach to increase community awareness and affordable housing networking opportunities. Serve as a reliable source of affordable housing information by cooperating in and/or hosting community presentations relating to affordable housing or fair housing.

- **Standard:** Each staff member should attend a minimum of one professional development seminar or conference, assist in hosting at least one community presentation, or participate in one event providing affordable housing or fair housing each quarter.
- **Achieved:** Yes ☐ No ☐

Goal 2.2: Implement or continue strategic initiatives to reinforce focus on organizational goals

- **Objective:** To facilitate greater availability of affordable housing supply and remove barriers to financing affordable housing in Escambia County.
- **Measurement:** Work to finance multifamily units by encouraging applications for bond issues and Florida Housing RFAs. Continue first-time single family mortgage loan program with down payment assistance. Continue to provide revolving loan program to finance Urban Infill homes.
- **Standard:** Staff will participate in at least one RFA process with an application to Florida Housing or a local source of subsidy; Authority will continue its programs to provide first or second mortgage loans for first time homebuyers; and Authority will continue to appropriate monies to support a revolving fund to make 0% loans for building affordable housing in Escambia County.
- **Achieved (RFA):** Yes ☐ No ☐
- **Achieved (Single Family Program):** Yes ☐ No ☐
- **Achieved (Urban Infill Program):** Yes ☐ No ☐

3. Promote Stewardship of Authority Assets and Resources

Goal 3.1: Ensure stewardship of assets and resources, through strategic planning and cooperative involvement

- **Objective:** To maintain long-term ability to continue to provide necessary services to those needing affordable housing.
- **Measurement:** The frequency of strategic planning sessions involving Authority Board, staff, and/or professional team to support existing or develop new programs supporting the Authority's mission and objectives.

- **Standard:** The Authority should participate in (i) weekly staff meetings; (ii) quarterly meetings involving staff and members of its professional team; and (iii) Authority Board meetings, as needed, to discuss status of current and planned programs during the course of the 2026/2027 fiscal year.
- **Achieved:** Yes ☐ No ☐

Goal 3.2: Cultivate a high performing, accountable, and engaged workforce

- **Objective:** To ensure succession and optimize investment in salary and benefits.
- **Measurement:** Annually assess all functional duties and responsibilities to realign staff goals and training, as necessary. Highlight daily learning opportunities in financial processing, housing operations, technology, professional communication, and marketing for potential staff succession.
- **Standard:** The Authority should perform the assessment of functional duties and responsibilities and continue succession planning during the 2026/2027 fiscal year.
- **Achieved:** Yes ☐ No ☐