

**Office of Management and Budget (OMB)**

OMB provides the reliable information, expert analysis, guidance, resources, and oversight needed to support excellent public service delivery and to ensure a fiscally responsible local government that is accountable to the community.

**Owner:**  
Clodfelter,  
David (OMB)  
**Department:**  
Office of  
Management  
and Budget

Perspective Name	Objective Name	Measure Name	Last Period Updated		Actual	Target	Actual FYTD	FYTD Goal	
Customer	Ensure the effective and fair disbursement of grant funding in community	Percentage of Payments Processed within 21-Days - CBOs	Mar '24	▲	97.0%	85.0%	96.8%	85.0%	▲
		Number of local organizations funded	2023 FY		142	n/a	142	n/a	
		Percentage of Payments Processed within 25 days (quarterly) - Ryan White	Q1 '24	▲	87%	85%	90%	85%	▲
	Actively pursue grant and sponsorship funding opportunities (OMB)	Grant, sponsorship and marketing funding received (in millions) by the County and CBOs associated with OMB revenue enhancement activities.	2023 FY	▲	\$96.6M	\$85.0M	\$96.6M	\$85.0M	▲
		Monitor County Bond Programs (OMB)	Number of Business Days to Process BBC-GOB Reimbursement Requests	'24 FQ2	▲	9.00 days	10.00 days	5.25 days	10.00 days
	Value of BBC-GOB funds expended QTR. (in millions)		'24 FQ2	▲	\$15.7M	\$20.0M	\$35.3M	n/a	▲
	Percentage of BBC-GOB program completion		'24 FQ2	▲	76.3%	75.6%	76.3%	75.6%	▲
	Prepare budget that supports the County's mission (OMB)	GFOA Budget Scores	2021 FY	▲	3.6	3.3	3.6	3.3	▲
		County Quarterly Budget Report issued to the Board within 45 days after quarter-end	'24 FQ1	▼	No	Yes	No	Yes	▼
	Promote development in distressed areas by monitoring and supporting CRAs (OMB)	Percentage point increase in all CRAs taxable value compared to the County tax roll	2023 FY	▼	-1.2 % points	3.5 % points	n/a	n/a	
		Number of Community Redevelopment Agencies (CRA)	2023 FY	▼	15	16	15	16	▼
	Promote independent living through early intervention and support services	Comprehensive Ryan White Program Site Visits (per contract year)	'24 FQ2	▲	0	0	6	6	▲
		People with HIV in Miami-Dade served	2023	▲	9,060	8,700			

			by Ryan White Program (includes Part A and Minority AIDS Initiative [MAI])						
<b>Improve alignment and achievement of strategic priorities throughout the County (OMB)</b>	◆	Average number of active users of the County Strategic Management System	Mar '24	▲	482	450	459	450	▲
		Performance Analysis Projects Completed	2023 FY	▲	10	8	10	8	▲
		Percentage of Strategic Plan Objectives supported by department business plans and scorecards	'24 FQ1	▲	100.00%	100.00%	100.00%	100.00%	▲
<b>Promote the Use of Lean Six Sigma (LSS) Techniques (OMB)</b>	◆	Employees Trained in Lean Six Sigma Yellow Belt Methodology (via OMB program) since inception	'24 FQ2	▲	1,756	1,700	1,756	1,700	▲
		Employees Trained in LSS Green Belt Methodology (via OMB program)	2023 FY	▲	177	175	177	175	▲
		Orange and Blue Belt Training Overall Satisfaction Rate	'24 FQ2	▲	4.84	4.75	4.77	4.75	▲
		Number of County employees completing advanced Lean Six Sigma training programs	2023 FY	▲	43	30	43	30	▲
		Number of attendees in an Orange or Blue module class	'24 FQ2	▲	164	100	237	200	▲
		Yellow Belt Training Overall Satisfaction Rate	'24 FQ2	▲	4.76	4.75	4.88	4.75	▲
		Overall percentage completion of transition to Constitutional Offices	'24 FQ2	■	15.0%	35.0%	15.0%	35.0%	■
<b>Foster successful reimbursement of emergency related expenditures</b>	◆	Percentage of emergency liaisons trained annually on procedures and forms	2023 FY	▲	100%	100%	n/a	n/a	
		Percentage of FEMA and State requests for information completed on time	Mar '24	▲	100%	100%	n/a	n/a	
<b>Provide effective planning and support for County Departments and Constitutional Office enterprise resource planning systems</b>			Employee satisfaction with INFORMS services (score out of 5)	2023 FY	■	3.26	3.50	n/a	n/a



<b>Financial</b>	<b>Meet Budget Targets (OMB)</b>	Expen: Total (OMB)	'24 FQ2		\$16,587K	\$15,832K	\$30,484K	\$31,668K		
		Revenue: Total (OMB)	'24 FQ2		\$434K	\$15,832K	\$3,146K	\$31,668K		
		Positions: Full-time Filled (OMB)	'24 FQ2		121	137	121	137		
	<b>Provide Sound Financial and Risk Management</b>		Bond Ratings Evaluation by Standard & Poor's	'23 FQ4		AA	AA	AA	AA	
			Bond Ratings Evaluation by Moody's	'23 FQ4		Aa2	Aa2	Aa2	Aa2	
			Percentage of Debt Service Payments Made Timely	'23 FQ4		100%	100%	100%	100%	
			Contingency Reserve as % of the total countywide general fund budget (excluding operating reserves)	2022 FY		2.50%	5.00%	2.50%	5.00%	
	<b>Maintain Healthy Reserves (OMB)</b>		% of GF budget Adjusted to Exclude Emergency Contingency Reserve from Total Budget	2022 FY		4.17%	5.00%	4.17%	5.00%	
			Carryover as a percentage of the General Fund Budget	2022 FY		3.6%	3.0%	3.6%	3.0%	
			Percentage Rate of Part A Formula Grant Expenditures - Ryan White	2022 FY		96%	95%	96%	95%	
<b>Internal</b>	<b>Maintain Program Integrity to Ensure Service Delivery (OMB)</b>	Number of Site Visits - CBOs	'23 FQ4		43	131	155	131		
			Percentage of OMB employees with a Yellow Belt or a Green Belt	2023 FY		48.00%	75.00%	48.00%	75.00%	
<b>Learning and Growth</b>	<b>Promote OMB employee development and leadership</b>		% of Performance Appraisals Completed Within 2 Weeks of Employee Status Date (OMB)	'23 FQ4		37.5%	80.0%	39.7%	80.0%	
	<b>Ensure performance evaluations are completed timely (OMB)</b>									

[Edit Scorecard](#)

Key: - Initiative - Featured Objective

## Initiatives for Objectives

Objective Name	Initiative	As Of	Status	Budget	Timing	Owners
Improve alignment and achievement of strategic priorities throughout the County (OMB)	WASD Customer Service Call Handle and Wait Time Review	3/19/2024	In Progress			Horton-Tavera, Amy (OMB); Bolt, GiGi (OMB)
	Develop and deploy an annual survey of County departments regarding OMB's support of the business planning and budget process.	3/14/2024	In Progress			Armas, Juan (OMB); Ferreira, Roy (OMB); Arango Verhelst, Sandra (OMB);

						Horton-Tavera, Amy (OMB)
	CAHSD Rental Assistance Customer Journey Support	1/22/2024	Complete			Ferreira, Roy (OMB); Horton-Tavera, Amy (OMB)
	DVOB Funding Analysis Request	10/19/2023	Complete			
	Countywide: Support ERP implementation	1/22/2024	Complete			Horton-Tavera, Amy (OMB); Maxwell, Carlos (OMB); Morales, Mayra (OMB)
	Monitor UCF Intimate Partner Study	10/18/2023	Complete			
	Improve the integration of business planning into the budget process.	3/19/2024	In Progress			Ferreira, Roy (OMB); Arango Verhelst, Sandra (OMB)
	Purpose Driven Procurement Process Review	3/19/2024	In Progress			Horton-Tavera, Amy (OMB); Morales, Mayra (OMB); Maxwell, Carlos (OMB)
Ensure the effective and fair disbursement of grant funding in community	Develop and Issue New Ryan White RFP	3/14/2024	In Progress			Arango Verhelst, Sandra (OMB); Horton-Tavera, Amy (OMB); Ferreira, Roy (OMB)
	Complete implementation of the new CBO competitive funding process.	3/14/2024	In Progress			Arango Verhelst, Sandra (OMB); Ferreira, Roy (OMB); Horton-Tavera, Amy (OMB)
Prepare budget that supports the County's mission (OMB)	Evaluate existing systems (including BAT, RFRO, INFORMS (Commitment Control) and CBAT) to enhance customer experience and system functionality	3/14/2024	In Progress			Horton-Tavera, Amy (OMB); Ferreira, Roy (OMB); Arango Verhelst, Sandra (OMB)
Promote development in distressed areas by monitoring and supporting CRAs (OMB)	Annually review Community Redevelopment accomplishments, assessing redevelopment plan implementation and TIF investment return	3/14/2024	In Progress			Horton-Tavera, Amy (OMB); Ferreira, Roy (OMB); Arango Verhelst, Sandra (OMB)
Facilitate County departments transition to independent Constitutional Offices	Countywide: Facilitate creation of Constitutional Officers as per Amendment 10	1/28/2023	In Progress			Lafarga, Ryan (OMB)
Provide Sound Financial and Risk Management	Develop formalized training on the bond issuance process and lease programs.	3/14/2024	In Progress			Horton-Tavera, Amy (OMB); Arango Verhelst, Sandra (OMB); Ferreira, Roy (OMB)
	Evaluate the new standards required by the Financial Data Transparency Act and work with the County's Dissemination Agent to adhere to the new requirements.	3/14/2024	In Progress			Horton-Tavera, Amy (OMB); Ferreira, Roy (OMB); Arango

					Verhelst, Sandra (OMB)
	Ensure the timely filing of the Annual Report to Bondholders, timely payment of all debt service payments, timely filing of event-based disclosures, covenant reporting and all other continuing disclosure requirements per Rule 15c2-12.2.	3/14/2024	In Progress		Arango Verhelst, Sandra (OMB); Ferreira, Roy (OMB); Horton-Tavera, Amy (OMB)
Foster successful reimbursement of emergency related expenditures	Integrate County procedures with new F-ROC processes	3/14/2024	In Progress		Quevedo, Elena (OMB)
Promote OMB employee development and leadership	Develop enhanced departmental culture building and staff development process, to include an onboarding orientation program, succession planning and cross-training processes, and engagement with external organizations	3/14/2024	In Progress		Armas, Juan (OMB); Horton-Tavera, Amy (OMB); Ferreira, Roy (OMB); Arango Verhelst, Sandra (OMB)

## Initiatives for Scorecard

Initiative	As Of	Status	Budget	Timing	Owners
Complete needed changes to INFORMS for the Constitutional Offices implementation	3/14/2024	In Progress			Ferreira, Roy (OMB); Arango Verhelst, Sandra (OMB); Horton-Tavera, Amy (OMB)
Continue to draft and refine proposed transition agreements with the future and modified constitutional offices through in-depth collaboration between impacted entities and all County support departments	3/14/2024	In Progress			Arango Verhelst, Sandra (OMB); Ferreira, Roy (OMB); Horton-Tavera, Amy (OMB)
Make related policy and operational decisions and prepare for fiscal and operational impacts of the transition	3/14/2024	In Progress			Arango Verhelst, Sandra (OMB); Horton-Tavera, Amy (OMB); Ferreira, Roy (OMB)
Identify most critical / complex / risky processes and craft departmental SOPs to improve process integrity and timeliness; in addition, update OMB's existing Countywide procedures as necessary.	3/14/2024	In Progress			Ferreira, Roy (OMB); Horton-Tavera, Amy (OMB)
Transition the INFORMS project from implementation mode to support mode	3/14/2024	In Progress			Ferreira, Roy (OMB); Horton-Tavera, Amy (OMB); Arango Verhelst, Sandra (OMB)
Complete high priority enhancements to Human Capital Management/Payroll and Financial areas and expansion of Strategic Sourcing functionality	3/14/2024	In Progress			Ferreira, Roy (OMB); Horton-Tavera, Amy (OMB); Arango Verhelst, Sandra (OMB)
Countywide: Facilitate creation of Constitutional Officers as per Amendment 10	1/28/2023	In Progress		On Schedule	Lafarga, Ryan (OMB)
Implement new Internal Grants Information Management System and Dashboard	3/14/2024	In Progress			Arango Verhelst, Sandra (OMB); Horton-Tavera, Amy (OMB); Ferreira, Roy (OMB)