



Office of Management and Budget Business Plan

Fiscal Years: 2025 and 2026*
(10/1/2024 through 9/30/2026)

Approved by:

A handwritten signature in black ink that reads "David Clodfelter".

David Clodfelter, Department Director

June 23, 2025

Date

A handwritten signature in black ink that reads "Carladenise Edwards".

Carladenise Edwards, Chief Administrative
Officer

Date

June 25, 2025

Plan Date: May 22, 2025

TABLE OF CONTENTS

DEPARTMENT OVERVIEW	Page 2
Departmental Vision and Mission	
Department Description	
Table of Organization	
Our Customers	
Strategic Alignment	
Recent Accomplishments	
KEY ISSUES	Page 9
PRIORITY INITIATIVES	Page 10
FUTURE OUTLOOK	Page 11
ATTACHMENT 1	Page 14
SWOT & BUSINESS PLAN REPORT	



DEPARTMENT OVERVIEW

Department Vision

Managing resources for a thriving community.

Department Mission

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.

Values

The following values guide our daily work and decision making:

- Integrity: We use the resources entrusted to us honestly and for the benefit of our visitors and residents.
- Accountability: We stand behind our work and accept the consequences of our decisions.
- Excellence: We strive for the highest quality results.
- Leadership: We make challenging decisions when necessary.
- Adaptability: We are flexible and open to new ideas and respond effectively to changing circumstances.
- Transparency: We are open and honest.
- Empathy: We consider the experiences and perspectives of our customers and stakeholders.

Department Description

OMB is responsible for operating and capital budgeting, strategic planning and business planning, performance improvement, revenue maximization, grants coordination, Community Redevelopment Agency (CRA) facilitation, bond program monitoring, monitoring the use of federal funds received for emergencies, facilitating incorporation and annexation functions of Miami-Dade County, and providing support for special projects. Taken together, these functions help ensure the County allocates and manages resources to reflect the community's priorities.

The **Management and Budget Division (Budget)** develops and implements the County's operating and capital budget to ensure financial resources, department operations and staffing levels are aligned to achieve results driven by policy and customer needs, and to promote a results-oriented government by linking funding recommendations with priorities outlined in the Strategic Plan and departmental business plans. The division is also responsible for providing annual updates to the County's Five-Year Financial Plan in addition to managing the Building Better Communities General Obligation Bond (BBC-GOB), Countywide Infrastructure Investment Program (CIIP), General Government Improvement Fund (GGIF), and the Quality Neighborhood Improvement Program (QNIP).

The **Administration and Consulting Services Division (ACS)** is responsible for facilitating the County's results-oriented government framework that includes strategic and business planning and facilitating systems to track the County's progress in achieving its goals. The division is also the County's internal management consulting resource, focusing on increasing efficiency and



Departmental Business Plan and Outlook

Department Name: Office of Management and Budget
FY2024-25 & FY2025-26

effectiveness of public service delivery. Its specialties include conducting organizational and business process reviews, helping county departments develop performance measures, training county employees in performance improvement techniques, including Lean Six Sigma, and developing and monitoring gainsharing agreements. Additionally, the division is responsible for the implementation of departmental policies and procedures, management of human resources, procurement, and legislation preparation and review.

The **Community Redevelopment and Municipal Services Division (CRMS)** administers and coordinates the Miami-Dade County Tax Increment Financing (TIF) Program; reviews and monitors the activities of all municipal CRAs and manages the day-to-day operations of all UMMA CRAs; coordinates the annexation and incorporation process; acts as liaison for all county departments; and analyzes data and makes appropriate policy recommendations for future municipal boundary decisions in Miami-Dade County.

The **Grants Coordination Division (GC)** administers, monitors, and supports County-driven grant processes to ensure compliance and program success. This includes managing the Mom and Pop Small Business Grant Program and the CBO Grant Program for human and social services, as well as overseeing externally funded programs like the federal Ryan White Program and the Ending the HIV Epidemic Initiative. GC monitors state and federal legislation, appropriations, and regulatory actions that affect grant programs and funding opportunities. Additionally, GC leads County grant revenue maximization efforts by identifying and pursuing new or enhanced funding to strengthen and expand programs. The division provides grant writing assistance to County departments and CBOs, as well as offers technical assistance and various trainings to enhance capacity building and support grant-related initiatives.

The **Program Management Division (PM)** manages federal funding received by Miami-Dade County for declared storms and other emergency-related situations from inception to closeout. This includes relief funding received from the U.S. Department of Treasury and the Federal Emergency Management Agency's Public Assistance program, and any future funding sources to reimburse the County's costs for emergencies. The division seeks reimbursement for the County while complying with federal requirements. The division also maintains accountability of federal funding received; initiates tracking of disaster-related costs through the County's Emergency Management System Solutions (EMASS) module in INFORMS; reconciles disaster-related costs to identify reimbursable costs; provides technical assistance to county departments; works collaboratively with funders to assist them in their reviews of County projects; and collects and compiles data to enable reporting to funders, County leaders and other stakeholders. The division also assists with the disbursement of opioid abatement funds to municipalities.

The **Statutory Structure and Policy Implementation Division (SSPI)** is responsible for developing needed agreements and otherwise supporting the newly independent Constitutional Offices. With the transition agreements for the constitutional offices now in place — including for the Sheriff, Supervisor of Elections, Property Appraiser, Tax Collector, and Clerk of Court and Comptroller — SSPI is focused on supporting these offices to ensure seamless transition of services as well as compliance with state law.

Bond Acquisition Administration (BAA) is responsible for overseeing all financial and analytical functions related to debt management process for Miami-Dade County's over \$18 billion debt portfolio comprised of 16 different credits. BAA ensures coordination among stakeholders responsible for monitoring and managing spending and cash flow projections and ensuring compliance during and after debt issuance.

In carrying out its responsibilities, OMB supports the Mayor's key deliverables. OMB Divisions that



Departmental Business Plan and Outlook

Department Name: Office of Management and Budget
FY2024-25 & FY2025-26

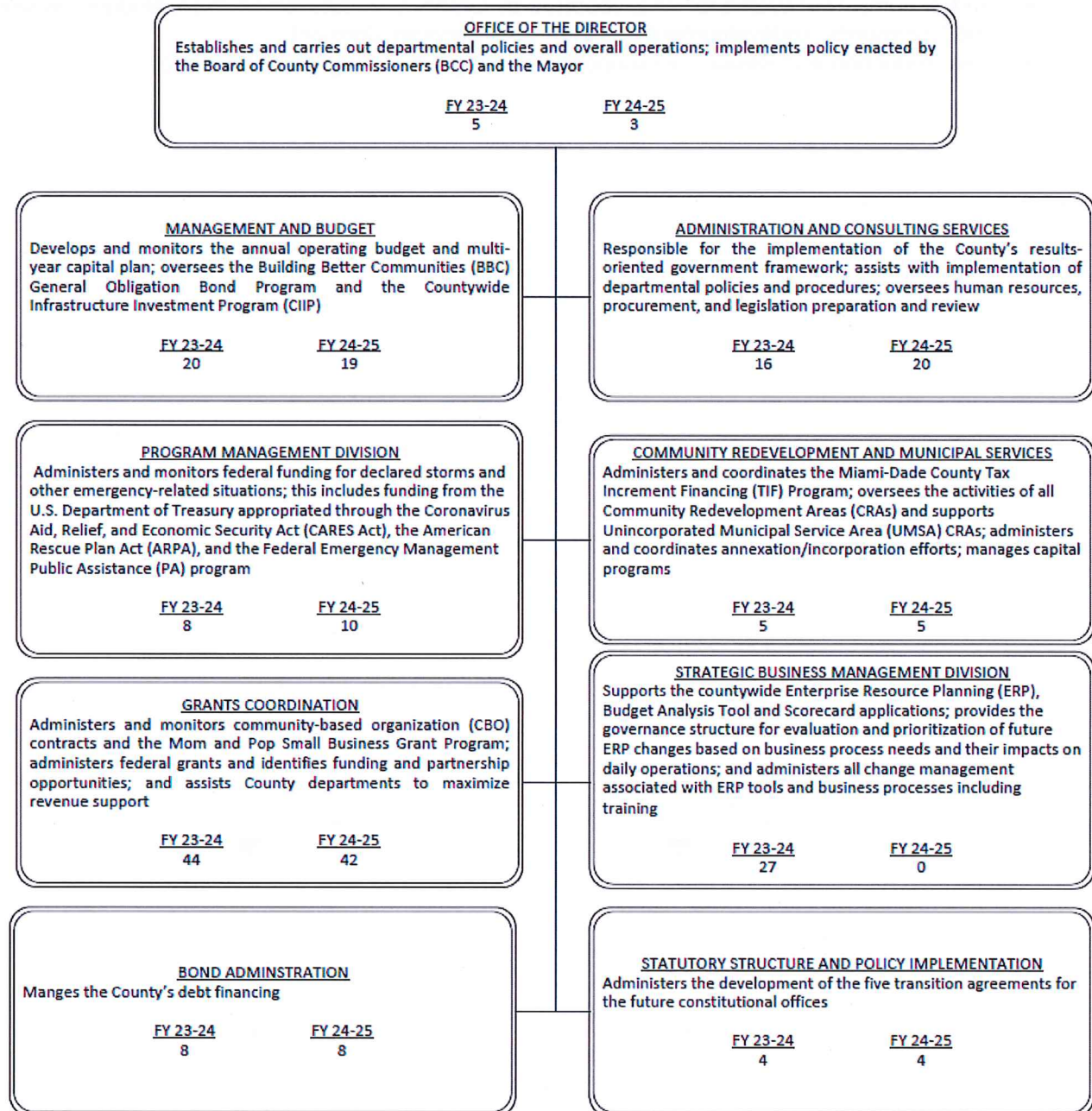
closely align to these key deliverables include the following:

- Fiscal Responsibility and Efficiency (supported by all divisions)
- Investment In Infrastructure (supported by Budget Division and Bond Acquisition Administration Division)
- Healthy and Safe Communities (supported by Grants Coordination Division)
- An Economy That Works for All (supported by Grants Coordination Division, Budget Division, and Community Redevelopment and Municipal Services Division)
- Risk Reduction and Resilience (supported by Program Management Division)



Departmental Business Plan and Outlook
Department Name: Office of Management and Budget
FY2024-25 & FY2025-26

Table of Organization



The FY 2024-25 total number of full-time equivalent positions is 111



Our Customers

OMB serves many internal and external customer groups through several products and services including developing the County's operating and capital budget, leading strategic and departmental business planning, managing bond financing and county debt, monitoring county bond programs, supporting CRAs, annexation and incorporation efforts, securing grant and alternative funding opportunities for county initiatives and projects, improving outreach to key service providers, and monitoring compliance with county, state and federal funding requirements.

Internal customers include county policy makers such as the Office of the Mayor and the Board of County Commissioners (BCC). OMB supports these customers by annually preparing a budget that reflects the community needs and priorities identified by these elected officials. OMB also provides customers with expert and timely information pertaining to county resources to help guide decision making and policy setting.

County departments and their staff are also important internal customers. OMB works with these customers by helping them develop their business plans and proposed budgets and by working with them to plan their expenditures and revenues on an ongoing basis throughout the year. OMB also supports these customers by helping them develop their process improvement skills and performance measures, and to complete their capital plans and grant applications.

OMB external customers include federal and state grant funding sources, not-for-profit organizations (including CBOs and recipients of Mom-and-Pop Small Business Grant Program support), public and philanthropic grant makers, academia and contractors supporting Miami-Dade County. In addition, OMB works directly with municipalities, residents, community leaders, CRA boards, and municipal advisory committees.

Additionally, OMB's stakeholders include the constitutional offices. This includes the offices of the Sheriff, Supervisor of Elections, Tax Collector, Property Appraiser, and Clerk of Courts and Comptroller.

Ultimately, OMB serves all Miami-Dade County residents and visitors consistent with the departmental values described above. By working with our internal and our external customers, OMB promotes responsiveness to community priorities and needs, helps residents and businesses thrive and prosper, makes our community safe and more resilient, and builds trust and collaboration among our stakeholders. The department strives to meet internal and external customer requirements in a timely, accurate, cost-effective, safe, and ethical manner. For example, requests for funding are reviewed ethically and fairly, budget development is completed accurately and timely, and the technical assistance provided is accurate.

Strategic Alignment

OMB primarily supports the following goals and objectives from the General Government portion of the Miami-Dade County Strategic Plan:

- | | |
|-------|---|
| GG1 | Accessible, transparent, and responsible government |
| GG1-2 | Facilitate community outreach and engagement to promote better decision-making in County government |
| GG1-4 | Promote fairness in the planning and delivery of County services |
| GG2-2 | Promote employee development and leadership |
| GG4 | Effective leadership and management practices |
| GG4-1 | Provide sound financial and risk management |



Departmental Business Plan and Outlook
Department Name: Office of Management and Budget
FY2024-25 & FY2025-26

GG4-2 Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents

Additionally, OMB's efforts in developing a comprehensive budget and monitoring the use of local, state and federal funds also support the following objectives from other strategic areas:

ED3-2 Increase economic opportunity and access to information technology
HS2-1 Provide the necessary support services to residents in need
HS2-4 Foster healthy living and ensure access to vital health services

Recent Accomplishments

ACS

- Developed enhanced departmental culture building and staff development process, to include an onboarding orientation program, executive retreat, and employee engagement program
- Successfully piloted a new Lean Six Sigma coaching initiative with the Parks, Recreation and Open Spaces Department, in which previously trained employees completed projects with guidance from OMB.
- Developed a Countywide Procedure setting standards for the creation and use of performance measures by County departments.
- Held focus groups with departmental subject matter experts to obtain feedback on the business planning process.

BAA

- Worked closely with all departments and monitored the Board of County Commissioners' legislative agendas to ensure compliance with the County's Continuing Disclosure Agreements. On May 31, 2024, we successfully met our annual SEC reporting requirement (due June 1).
- Managed all financial and analytical functions related to the debt management process for Miami-Dade County's \$18 billion portfolio. During FY24, the division successfully completed 11 financing transactions, including six bond issuances, one non-revolving line of credit, one lease drawdown, and three letters of credit extensions.
- In FY24, there were six upgrades across the County's 16 credits.

Budget

- Developed the FY 2024-25 proposed budget that was adopted by the Board on September 19, 2024. The budget included challenging funding strategies for organizational changes required by the passage of Amendment 10 to the State Constitution that would occur in January of the FY 2024-25 year. Changes included the reestablishment of the Office of the Sheriff, the transfer of several financial duties to the Clerk of Court and Comptroller, and the creation of the independent offices of the Supervisor of Elections, the Tax Collector, and the Property Appraiser.
- The FY 2023-24 Adopted Budget Book received the Distinguished Budget Presentation Award from the Government Finance Officers Association for the 23rd consecutive year.
- Managed the voter-approved Building Better Communities General Obligation Bond (BBC-GOB) program which includes 158 capital programs. \$2.2 billion of the \$2.9 billion approved by the voters in 2005 has been expended of which \$90.656 million was spent in FY 2023-24. As part of the Countywide Infrastructure Investment Program (CIIP), the division managed 55 capital programs and expended \$96.6 million to address various health, life safety, security and infrastructure improvements countywide.



Departmental Business Plan and Outlook
Department Name: Office of Management and Budget
FY2024-25 & FY2025-26

CRMS

- Successfully approved a \$1 million loan and a \$2 million TIF agreement with a developer to complete a 216 units workforce housing and mix used development in West Perrine CRA.
- Successfully approved a \$5 million grant and a \$5.2 million TIF agreement with a developer to complete a 355 units workforce housing and mix used development in Naranja Lakes CRA.
- Created a commercial grant program in West Perrine, NW 7th Avenue and NW 79th Street CRAs to help local businesses in the area receive much needed help and revitalize the neighborhoods by removing slum and blight.
- Partnered with Rebuilding Together to launch a Residential grant program in the Naranja Lakes CRA Area.
- Procured and hired two professional teams for the NW 7th Avenue and NW 79th Street CRAs to conduct much needed economic assessment and grant coordination for both areas; two professional teams to conduct Finding of Necessity studies for the NW 7th Avenue and West Perrine CRAs proposed expansions; and two professional teams to complete the Naranja Lakes and the Goulds CRAs redevelopment plans.
- Completed the full assessment of the Florida City Area J Annexation report.

Grants

- Successfully completed the county-wide transition, training, and adoption of the Grants Information Management System (GIMS) which will be a centralized resource database for tracking grants.
- Partnered with ITD to create an Automated Pending Grants Bi-Weekly Report to streamline updates.
- Co-wrote, edited, submitted, or provided support for more than 94 grant projects, resulting in \$224,809,349 in grant awards for various departments.
- Completed review for the new CBO new competitive funding process (CBO2425)
- Of 9,060 clients (low-income people with HIV who live in Miami-Dade) served in the Ryan White Part A/Minority AIDS Initiative Program in fiscal year 2023, 86% of them were virally suppressed during the reporting period. The goal is 90%.

SSPI

- Completed the drafting and refinement of transition agreements for the Constitutional Offices. This process involved in-depth collaboration with impacted entities, including the Police, Elections, Tax Collector, and Finance Departments, the Property Appraiser, the Clerk of Court and Comptroller, and County support departments, to ensure a comprehensive and coordinated approach.
- Made critical policy and operational decisions to address the fiscal and operational impacts of the transition, ensuring readiness and alignment across all affected entities to support a seamless implementation of the constitutional changes.

Program Management

- Achieved the second highest score, 58 out of 60 points, in the Florida Division of Emergency Management's new Disaster Readiness Assessment process.
- Successfully compiled claims for 16 departments for Hurricane Milton, submitting an expedited project within a month of the incident.
- Reinstated over \$1 million in funding for the COVID-19 Non-Congregate Shelter and Facility Augmentation projects through successful appeals
- Implemented improvements and innovative tools to collaborate more efficiently with departments, based on lessons learned from previous cost recovery efforts (i.e., incident-specific SharePoint site as a centralized document repository, detailed instructions and templates to facilitate departmental compliance with FEMA requirements).



Departmental Business Plan and Outlook

Department Name: Office of Management and Budget
FY2024-25 & FY2025-26

- Trained 240 departmental emergency liaisons and timekeepers to enhance cost recovery for force account costs.

KEY ISSUES

To identify its key issues, OMB completed a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis, the results of which are included in Attachment 1. The following are key issues OMB needs to address in the current and upcoming fiscal year.

SSPI / Department-wide – Key issues include the following:

- Transition Agreements for Constitutional Offices
 - Ensuring the successful execution and implementation of transition agreements remains the foremost priority, as they are critical to defining the operational relationship between the County and the constitutional offices.
- Transitioning Personnel and Services
 - Seamlessly transitioning all personnel, services, and associated resources to the newly established constitutional offices will be a cornerstone of the County's efforts to maintain continuity and efficiency.
- Adapting to Elected Officials' Perspectives
 - Remaining flexible and responsive to the perspectives and priorities of the newly elected officials will be essential in shaping successful collaboration and operational alignment with the constitutional offices.
- Evolving Team Roles
 - Shifting the focus of the County's team from overseeing the constitutional office transition process to serving as liaisons between the constitutional offices and the County will be vital for fostering long-term partnerships and operational synergy.

Budget – Key issues include the following:

- Developing a budget with uncertain economic environment and governmental structural changes will be challenging.
- Working with stakeholders to obtain funding priorities in a timely manner is critical.

ACS – Key issues include the following:

- The Strategic Plan is expiring in 2027; with the change in government structure resulting from the constitutional office transition, there is a need to reengage the community to understand its aspirations for County government.
- OMB's Green Belt training provider has ceased to operate. Additionally, there is an opportunity to refresh the LSS curriculum to ensure it is still state of the art / reflects the current knowledge in the field.
- There is currently an opportunity to develop a strategic approach to training and succession planning to ensure the department can meet demands for service in a sustainable manner. This includes gaining exposure to state-of-the-art financial, budgeting and performance improvement tools and techniques to ensure staff is up to date with current knowledge.
- There is a need to verify the effectiveness of departmental culture building efforts in order to focus efforts on the best approaches.
- Given recent departmental changes, it is important to revisit and strengthen processes supporting the department's organizational culture; in addition, there is a need for succession planning and cross-training.



Departmental Business Plan and Outlook

Department Name: Office of Management and Budget
FY2024-25 & FY2025-26

- Budgetary, grant, CRA, bond and performance information can be complicated for residents to obtain and to understand. To encourage engagement, OMB information on the departmental website needs to be presented in a more logical and understandable manner.
- Numerous AOs / IOs and County procedures are out of date; additionally, with the onset of the constitutional offices, it is an opportune time to comprehensively review these items

GC – Key issues include the following:

- There is a need to issue a new Request for Proposals (RFP) for the Ryan White Ending the HIV Epidemic (EHE) funded services. There is a need to address CBO and evolving community needs.
- There is a need to address CBO and evolving community needs.
- There is a need to strengthen grants management and reporting across departments, enhancing their capacity to apply for and manage grant funds to address unfunded needs.
- There is a need to enhance capacity building for Community-Based Organizations (CBOs), including targeted training, technical assistance, and onboarding support for new agencies and providers.

PM – Key issues include the following:

- Data entry into the EMASS system is cumbersome and departments are making several errors with their entries.
- There is potential overlap of cost recovery functions with the Department of Emergency Management (DEM), which creates inefficiencies.

PRIORITY INITIATIVES

To address these key issues and serve our customers OMB will undertake the following priority initiatives:

SSPI / Department-wide – Priority initiatives include the following:

- Create a structured and efficient communication process between the County and constitutional offices to ensure clarity, consistency, and strong collaboration.
- Implement transition agreements with constitutional offices through in-depth collaboration between impacted entities (Offices of the Sheriff, Supervisor of Elections, Property Appraiser, Tax Collector, and Clerk of Courts and Comptroller) and all County support departments.

Budget – Priority initiatives include the following:

- Evaluate existing systems (including BAT, RFRO, INFORMS (Commitment Control) and CBAT) to enhance customer experience and system functionality.
- Improve the integration of business planning into the budget process.

ACS – Priority initiatives include the following:

- Develop an approach for a strategic planning process to include the possible procurement of an external provider to solicit priorities from residents, elected officials, and other community stakeholders
- Procure new Lean Six Sigma Green and Black Belt training partner.
- Develop a comprehensive training and succession planning program that will include staff development initiatives, research of industry best practices, and a succession plan. Partner with central HR as appropriate.
- Develop and implement a departmental employee survey.



Departmental Business Plan and Outlook

Department Name: Office of Management and Budget

FY2024-25 & FY2025-26

- Identify most critical, complex or risky processes and craft departmental SOPs to improve process integrity and timeliness; in addition, update OMB's existing Countywide procedures as necessary.
- Revise the OMB website to make sure departmental services are clear, and that information is understandable and easy to find; include graphical and transparent budgetary information on the OMB website so residents and other stakeholders can obtain summarized budgetary information.
- Conduct a comprehensive review of AOs, IOs and Procedures to ensure these items are up to date.

GC – Priority initiatives include the following:

- Develop and issue a new Ryan White Ending the HIV Epidemic (EHE) RFP Process inclusive of all services and all funding; deploy new grants software to facilitate the new grant RFP process.
- Finalize the CBO competitive funding process recommendations.
- Develop a countywide enhancement to INFORMS that links GIMS and INFORMS as a centralized dashboard for greater expenditure transparency; develop an internal training curriculum; develop strategic grant plan tool; and refresh internet/intranet resources.
- Develop and implement an annual schedule of capacity-building training sessions for CBOs (current and community-wide); and provide 1:1 technical assistance (TA) to CBOs referred internally and externally.

PM – Priority initiatives include the following:

- Develop a required training for employees' use of EMASS and incorporate Constitutional Offices in the training.
- Develop a plan to coordinate cost recovery activities with the Florida Department of Emergency Management

FUTURE OUTLOOK

OMB's core functions are heavily impacted by external factors such as property values as well as local and national other economic trends, state legislation, and federal and state funding levels. These factors can directly impact the availability of general fund resources, bond financing, and grant opportunities to fund critical needs in the community. Among other things, they can also affect OMB's role in monitoring the activities of county-funded community-based organizations, managing existing bond programs, creating new community redevelopment areas or incorporation/annexation applications, and ensuring the County's compliance with the federal grants such as the Ryan White program. While OMB cannot predict the future, it will continue to monitor such trends to determine their potential impacts on the department and on the County. Additionally, the following significant factors may impact the Department's operations in the future:

Constitutional Offices: The County has successfully navigated the structural changes required by Section 1 of Article VIII of the Florida Constitution, which mandated the establishment of new constitutional offices—Elections Supervisor, Tax Collector, Property Appraiser, and Sheriff—following the 2024 elections. In the coming years, it will be imperative for OMB to address long-term operational and budgeting challenges associated with this change. OMB will remain focused on ensuring these offices receive the necessary County support to manage their operations successfully. Developing and maintaining effective working relationships between the County and the new constitutional offices will be a priority to facilitate collaboration and shared goals.

State law also mandates that the County provide administrative, financial, and other support services to the Office of the Sheriff through September 2028. Additionally, it is anticipated that similar support will continue for the other constitutional offices. OMB will play a key role in delivering critical services such



Departmental Business Plan and Outlook
Department Name: Office of Management and Budget
FY2024-25 & FY2025-26

as INFORMS support, grant management, budget assistance, management consulting, and resource recovery following emergency events. These efforts will be essential to ensuring smooth operations and fostering a successful partnership with the constitutional offices in the years ahead.

OMB's *Administration and Consulting Services Division* will continue promoting policies, methodologies, performance measurement software, and countywide training to make performance measures more relevant to departmental management. It will also continue to perform targeted analysis of organizational structures and internal process reviews countywide, especially as the County continues to streamline operations. In addition, demand for performance analysis and improvement services will remain very high. As a result, the department will continue to deploy strategies to expand the knowledge of proven problem-solving techniques across the organization. Furthermore, the Administration and Consulting Services Division will continue to enhance processes to streamline and assist departments with obtaining the maximum reimbursement possible for disaster events.

Emergency events: While Miami-Dade County experienced a mild flood and storm event during the 2024 hurricane season, but it has not been affected by an emergency of significant scale since 2021. Catastrophic emergency events may happen at any time, including outside of hurricane season. The county's geography makes it prone to hurricanes with a potential of significant damages given the numbers of residents and businesses located near the coast. Buildings are also highly vulnerable to the effects of climate change. Building structures and foundations weaken and become susceptible to collapse. Therefore, in the coming years, OMB will continue to enhance processes to streamline and assist departments with obtaining the maximum reimbursement possible for addressing disaster events.

Organizational culture: OMB continues to work within its own fiscal constraints to deliver excellent service in a timely manner by providing responses to requested reports and provide effective and efficient analysis and reviews in conjunction with other county departments. The department will continue to have challenges but will strive to develop a workforce, which through cross training and succession planning, will continue to be the engine that supports and facilitates results-oriented and resilience-focused government in Miami-Dade County.

Grants Coordination: As changes prompted by a new federal administration develop, the County's grants coordination team and supported departments may experience shifts in federal funding priorities, eligibility requirements, and compliance guidelines for reporting, especially related to the recent increases in funding received from the Infrastructure Investment and Jobs Act (IIJA), Inflation Reduction Act (IRA), Ryan White Program Grants, and other funding sources. Additionally, legislative changes could impact the CBOs we serve, creating challenges such as a lack of clear guidance and reduced funding from other sources. Overall, potential reallocations in funding for infrastructure, clean energy, and manufacturing programs may necessitate seeking alternative sources. Grant proposals may need to be reframed to emphasize national security, economic impact, and job creation priorities over progressive environmental or health objectives. Federal deferrals or rescissions could introduce delays or uncertainties, especially for multi-year projects, complicating the continuity of ongoing County initiatives. In the next two years, departments and grants coordination efforts may also need to focus on timely contract execution, front-loading or efficient spending, pursuing shorter-term projects, and identifying stable, recurring funding for long-term initiatives. This will require flexibility and resilience to navigate a shifting funding landscape.

OMB's *CRMS Division* will continue to monitor municipal and unincorporated CRAs, and coordinate incorporation and annexation activities. The UMCA CRAs, previously challenged to fund large projects, have experienced a continued growth of their tax base, and are now in position to revitalize their communities as mandated by their redevelopment plan. CRAs are focusing on their respective redevelopment plans to ensure that the strategies laid out are still viable in the foreseeable future.



Departmental Business Plan and Outlook
Department Name: Office of Management and Budget
FY2024-25 & FY2025-26

Additionally, the unit evaluates and processes requests for new or expanded CRAs, ensuring that these requests do not negatively impact the County's general fund. The unit will continue to develop strategies for all CRAs to collaborate in addressing issues confronting their respective communities, and the County as a whole. Some of these initiatives include commercial and residential grant programs, large scale projects, small business development assistance and the continuation of partnering with community stakeholders. In addition, as renewed interests in annexations and incorporations arise, OMB will continue to evaluate the effects annexations and incorporations might have to the County's future budget outlook. Lastly, the section will continue to monitor the County's SMART TIID providing recommendations and financial analysis.

CRMS' core functions are heavily impacted by external factors such as the local political environment, property values and the local and national economic trends, state legislation, and federal and state funding. These factors directly impact the availability of TIF funds and grants opportunities to fund infrastructure needs and carry out the CRAs redevelopment plans. As new CRAs are created, expanded, or extended, or new requests for incorporation and annexation are submitted, a complete assessment of the request must be completed to ensure that these requests do not negatively impact the County's general fund.

SWOT & BUSINESS PLAN REPORT
(ATTACHMENT 1)



OMB SWOT 2025-2026

Strengths	Weaknesses
Experienced, professional, and knowledgeable leadership and staff throughout all divisions	No formalized plan or process for staff development and succession planning to include employee retention strategies.
Capacity to deliver very specialized management and budget services to other departments and the community	Challenges to manage the County's budget due to the complexities of the organization's diverse and competing interests.
Strong communication and collaboration / teamwork skills	No documented procedures for certain functions and some procedures are out of date potentially creating inefficiencies.
Positive relationships and reputation with partners and other departments	Lack of processes for getting customer feedback in certain areas, making unclear if OMB is meeting customers' needs.
Access to informational and technological resources to perform high quality work	Need to increase communication and training to other departments and stakeholders to ensure that their actions are in synch with OMB needs, expectations, and processes
A culture of continuous improvement supported by values that drive performance excellence	
The strategic management framework and effective policies and procedures	
Opportunities	Threats
Proactively update and expand policies, procedures, and processes, both at the departmental and Countywide levels, to reduce risk, ensure compliance, and improve efficiency and efficacy.	Changes in laws and/or regulations can create challenges for consistent delivery of services.
Continue to update and support processes by implementing the efficient use of technology.	A poor performing economy would create negative funding impacts making it more difficult to provide quality services.
Increase staff development, retention, and culture building efforts through the implementation of strategic human resources and training activities, such as, departmental training plan, succession planning, cross-training, etc.	Unexpected stakeholder actions can impact OMB operations.
Promote OMB services more effectively to other County departments that are unaware of the expert assistance available to them, such as, lean six sigma training, performance improvement projects, grants assistance, benchmarking, etc.	It may be difficult for OMB to retain or hire staff and meet salary and benefits expectations in a strong labor market.
Increase collaboration with other departments and agencies to improve the County's financial management and budget process as well as encourage OMB partners to collaborate with each other.	The speed of technological changes can render County IT systems ineffective as well as vulnerable to illegal intrusion, for example, AI.
Establish measures to track performance as it relates to delivering services to the Constitutional Offices.	Natural disasters and other emergency events can negatively impact County and OMB services, resources, residents, and employees.
Growing Interest in Grant Funding/Grant Writing Services: There is an increasing focus on securing grants for unmet needs, along with supplemental funding plans for departments	Long-Term Budgeting Challenges: Ensuring adequate budget support for constitutional offices could strain resources.
Changes to organizational structure due to constitutional officer implementation and other potential state legislative action will provide opportunity for new improved processes, smaller and more nimble County government, and new collaborative opportunities with the new external entities.	Changes to organizational structure due to constitutional officer implementation and other potential state legislative actions could negatively impact resources and add an additional layer of bureaucracy.

As Of <= 05/29/2025

Business Plan Report
Office of Management and Budget (OMB)

Measure Name	Last Period Updated		Last Period Updated Actual	Last Period Updated Target	FYTD2024-25 Actual	FYTD2024-25 Target	FY2023-24 Actual	FY2023-24 Target	FY2024-25 Annualized Target	FY2025-26 Annualized Target	Objective Name	Parent Objective Name
Average number of active users of the County Strategic Management System	Apr '25		472	350	466	363	456	450	363	350	Improve alignment and achievement of strategic priorities throughout the County	GG4: Effective leadership and management practices GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Bond rating evaluation by Moody's	'25 FQ2		Aa2	Aa2	Aa2	Aa2	Aa2	Aa2	Aa2	Aa2	Provide sound financial and risk management	GG4-1: Provide sound financial and risk management
Bond rating evaluation by Standard & Poor's	'25 FQ2		AA	AA	AA	AA	AA	AA	AA	AA	Provide sound financial and risk management	GG4-1: Provide sound financial and risk management
Carryover as a percentage of the General Fund budget	2024 FY		1.7%	2.5%	1.7%	2.5%	1.7%	2.5%	3.6%	n/a	Maintain healthy reserves	GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Comprehensive Ryan White Program site visits (per contract year)	'25 FQ2		4	7	10	18	14	11	18	18	Promote independent living through early intervention and support services	HS2-1: Provide the necessary support services to residents in need
County Quarterly Budget Report issued to the Board within 45 days after quarter-end	'25 FQ2		No	Yes	No	Yes	No	Yes	Yes	Yes	Prepare budget that supports the County's mission	GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
County TIF revenue payments (in millions)	2025 FY		\$108.4	\$105.2	\$108.4	\$105.2	\$93.4	\$93.3	\$105.2	\$123.2	Promote development in distressed areas by monitoring and supporting CRAs	ED3-2: Increase economic opportunity and access to information technology
Countywide emergency contingency reserve balance (in millions)	2024 FY		\$64.5	\$63.1	\$64.5	\$63.1	\$64.5	\$63.1	\$66.6	n/a	Maintain healthy reserves	GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Employees Trained in LSS Green Belt Methodology (via OMB program) since inception	2024 FY		182	190	182	190	182	190	190	190	Promote the use of Lean Six Sigma (LSS) techniques	GG4: Effective leadership and management practices GG2-2: Promote employee development and leadership
Employees trained in Lean Six Sigma yellow belt methodology (via OMB program) since inception	'25 FQ2		1,916	1,800	1,916	1,800	1,860	1,750	1,800	2,000	Promote the use of Lean Six Sigma (LSS) techniques	GG4: Effective leadership and management practices GG2-2: Promote employee development and leadership
Expen: Total (OMB)	'25 FQ2		\$9,421K	\$15,104K	\$22,570K	\$60,417K	\$57,174K	\$63,339K	\$60,417K	n/a	Meet Budget Targets (OMB)	Office of Management and Budget
Florida Recovery Obligation Calculation (FROC) for Miami Dade County	2025 FY		57 points	60 points	57 points	60 points	58 points	60 points	60 points	60 points	Foster successful reimbursement of emergency related expenditures	GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
GFOA budget scores	2024 FY		3.3	3.3	3.3	3.3	3.3	3.3	3.3	3.3	Prepare budget that supports the County's mission	GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Grants funding received (in \$ millions)	2024 FY		\$225	\$85	\$225	\$85	\$225	\$85	\$85	\$85	Actively pursue grant and sponsorship funding opportunities	GG4-1: Provide sound financial and risk management GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Number of Business Days to Process BBC-GOB Reimbursement Requests	'25 FQ2		7.20 days	10.00 days	6.67 days	10.00 days	6.96 days	10.00 days	10.00 days	10.00 days	Monitor County Bond Programs	GG4-1: Provide sound financial and risk management
Number of Community Redevelopment Agencies (CRAs)	2024 FY		15	16	15	16	15	16	16	16	Promote development in distressed areas by monitoring and supporting CRAs	ED3-2: Increase economic opportunity and access to information technology
Number of County employees completing advanced Lean Six Sigma training programs	2024 FY		33	30	33	30	33	30	30	30	Promote the use of Lean Six Sigma (LSS) techniques	GG4: Effective leadership and management practices GG2-2: Promote employee development and leadership
Number of attendees in an Orange or Blue module class	'25 FQ2		86	100	204	400	575	400	400	400	Promote the use of Lean Six Sigma (LSS) techniques	GG4: Effective leadership and management practices GG2-2: Promote employee development and leadership
Number of completed department assessments to learn about their emergency operations and propose recommendations	2024 FY		4	4	4	4	4	4	5	5	Foster successful reimbursement of emergency related expenditures	GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Number of employee engagement activities conducted	'25 FQ2		5	3	7	12	n/a	n/a	12	12	Develop and maintain a departmental culture of excellence through employee engagement activities	GG2-2: Promote employee development and leadership
Number of local organizations funded through the County CBO General fund grant process	2024 FY		131	142	131	142	131	142	142	132	Ensure the effective and fair disbursement of County General Fund grant funding in	GG1-3: Ensure involvement of local organizations to help address priority needs of our residents

Measure Name	Last Period Updated		Last Period Updated Actual	Last Period Updated Target	FYTD2024-25 Actual	FYTD2024-25 Target	FY2023-24 Actual	FY2023-24 Target	FY2024-25 Annualized Target	FY2025-26 Annualized Target	Objective Name	Parent Objective Name
Number of local organizations funded through the County CBO General fund grant process	2024 FY	🔴	131	142	131	142	131	142	142	132	Ensure the effective and fair disbursement of County General Fund grant funding in community	HS2-4: Foster healthy living and ensure access to vital health services HS2-1: Provide the necessary support services to residents in need GG1-4: Promote fairness in the planning and delivery of County services
Number of site visits - CBOs	'25 FQ2	🟢	0	0	0	142	251	142	142	117	Maintain program integrity to ensure service delivery	GG1-3: Ensure involvement of local organizations to help address priority needs of our residents HS2-1: Provide the necessary support services to residents in need
Orange and Blue Belt Training Overall Satisfaction Rate	'25 FQ2	🔴	4.48	4.75	4.61	4.75	4.81	4.75	4.75	4.75	Promote the use of Lean Six Sigma (LSS) techniques	GG4: Effective leadership and management practices GG2-2: Promote employee development and leadership
Overall percentage completion of transition to Constitutional Offices	'25 FQ2	🟢	90.0%	90.0%	90.0%	100.0%	75.0%	75.0%	100.0%	100.0%	Facilitate County departments transition to independent Constitutional Offices	GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Overall score from the LSS Training Survey question: "I will apply this training to my job"	2024 FY	🟢	4.67	4.00	4.67	4.00	4.67	4.00	4.00	4.00	Promote the use of Lean Six Sigma (LSS) techniques	GG4: Effective leadership and management practices GG2-2: Promote employee development and leadership
People with HIV in Miami-Dade served by Ryan White Program	2024	🟢	9,316	9,000	n/a	n/a	n/a	n/a	9,300*	n/a	Promote independent living through early intervention and support services	HS2-1: Provide the necessary support services to residents in need
Percent of total County Urban Development Boundary area within TIF districts	2024 FY	🔴	26.9%	28.0%	26.9%	28.0%	26.9%	28.0%	28.0%	28.0%	Promote development in distressed areas by monitoring and supporting CRAs	ED3-2: Increase economic opportunity and access to information technology
Percentage Rate of Part A Formula Grant Expenditures - Ryan White	2024 FY	🟢	95%	95%	95%	95%	95%	95%	95%	95%	Maintain program integrity to ensure service delivery	GG1-3: Ensure involvement of local organizations to help address priority needs of our residents HS2-1: Provide the necessary support services to residents in need
Percentage of BBC-GOB program completion	'25 FQ2	🟢	79.8%	78.5%	79.8%	80.2%	78.2%	76.3%	80.2%	90.0%	Monitor County Bond Programs	GG4-1: Provide sound financial and risk management
Percentage of FEMA and state requests for information completed on time	Apr '25	🟢	100%	100%	100%	100%	100%	100%	100%	100%	Foster successful reimbursement of emergency related expenditures	GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Percentage of OMB employees with a Yellow Belt or a Green Belt	2024 FY	🟢	90.00%	75.00%	90.00%	75.00%	90.00%	75.00%	75.00%	80.00%	Promote OMB employee development and leadership	GG2-2: Promote employee development and leadership
Percentage of Payments Processed within 21-Days - CBOs	Apr '25	🟢	98.0%	85.0%	91.9%	85.0%	97.0%	85.0%	85.0%	85.0%	Ensure the effective and fair disbursement of County General Fund grant funding in community	GG1-3: Ensure involvement of local organizations to help address priority needs of our residents HS2-4: Foster healthy living and ensure access to vital health services HS2-1: Provide the necessary support services to residents in need GG1-4: Promote fairness in the planning and delivery of County services
Percentage of Payments Processed within 25 days (quarterly) - Ryan White	Q2 '25	🟢	90%	85%	n/a	n/a	n/a	n/a	85%*	n/a	Ensure the effective and fair disbursement of County General Fund grant funding in community	GG1-3: Ensure involvement of local organizations to help address priority needs of our residents HS2-4: Foster healthy living and ensure access to vital health services HS2-1: Provide the necessary support services to residents in need GG1-4: Promote fairness in the planning and delivery of County services
Percentage of Strategic Plan objectives supported by department business plans and scorecards	'25 FQ2	🟢	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	Improve alignment and achievement of strategic priorities throughout the County	GG4: Effective leadership and management practices GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Percentage of debt service payments made timely	'25 FQ2	🟢	100%	100%	100%	100%	100%	100%	100%	100%	Provide sound financial and risk management	GG4-1: Provide sound financial and risk management
Percentage of emergency liaisons trained annually on procedures and forms	2024 FY	🟢	100%	100%	100%	100%	100%	100%	100%	100%	Foster successful reimbursement of emergency related expenditures	GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Percentage of performance appraisals completed within 2 weeks of employee status date (OMB)	'25 FQ2	🔴	11.5%	80.0%	17.1%	80.0%	37.6%	80.0%	80.0%	80.0%	Ensure performance evaluations are completed timely (OMB)	GG2-2: Promote employee development and leadership
Percentage point increase in all CRAs taxable value	2024 FY	🔴	-1.2 % points	3.5 % points	-1.2 % points	3.5 % points	-1.2 % points	3.5 % points	3.5 % points	3.5 % points	Promote development in distressed areas by	ED3-2: Increase economic opportunity and access to

Measure Name	Last Period Updated		Last Period Updated Actual	Last Period Updated Target	FYTD2024-25 Actual	FYTD2024-25 Target	FY2023-24 Actual	FY2023-24 Target	FY2024-25 Annualized Target	FY2025-26 Annualized Target	Objective Name	Parent Objective Name
compared to the County tax roll											monitoring and supporting CRAs	information technology
Performance analysis projects completed	2024 FY	🟢	9	8	9	8	9	8	8	8	Improve alignment and achievement of strategic priorities throughout the County	GG4: Effective leadership and management practices GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Positions: Full-time Filled (OMB)	'25 FQ2	🔴	99	111	99	111	128	137	111	n/a	Meet Budget Targets (OMB)	Office of Management and Budget
Quality index score for OMB-led LSS performance improvement projects	'25 FQ2	🟢	4.0	4.0	4.0	4.0	n/a	n/a	4.0	4.0	Improve alignment and achievement of strategic priorities throughout the County	GG4: Effective leadership and management practices GG4-2: Effectively prioritize, allocate and use resources to meet the current and future operating and capital needs for all our residents
Revenue: Total (OMB)	'25 FQ2	🔴	\$7,801K	\$15,104K	\$15,033K	\$60,417K	\$63,856K	\$63,339K	\$60,417K	n/a	Meet Budget Targets (OMB)	Office of Management and Budget
Total number of public speakers at budget hearings	2024 FY	🟢	276	150	276	150	276	150	150	150	Facilitate community involvement and engagement in the budget process	GG1-2: Facilitate community outreach and engagement to promote better decision-making in County government
Value of BBC-GOB funds expended quarterly. (in millions)	'25 FQ2	🔴	\$43.3M	\$20.0M	\$49.3M	\$80.0M	\$90.7M	\$80.0M	\$80.0M	\$80.0M	Monitor County Bond Programs	GG4-1: Provide sound financial and risk management
Yellow Belt Training Overall Satisfaction Rate	'25 FQ2	🟢	4.82	4.75	4.91	4.75	4.81	4.75	4.75	4.75	Promote the use of Lean Six Sigma (LSS) techniques	GG4: Effective leadership and management practices GG2-2: Promote employee development and leadership

* - This measure has been annualized to match the fiscal year-to-date total for this report. This year-to-date measure is configured based on the calendar year.

Key: 🟢 Initiative - Featured Objective

Initiatives for Measures

There are no Initiatives associated to the Measures

Initiatives for Objectives

Objective Name	Initiative	As Of	Status	Budget	Timing	Owners
Improve alignment and achievement of strategic priorities throughout the County	WASD Fleet Overtime Review	5/22/2025	Complete	🟢	🟢	Arango Verhelst, Sandra (OMB); Morales, Mayra (OMB); Ferreira, Roy (OMB)
	WASD Customer Service Call Handle and Wait Time Review	12/18/2024	Complete			Horton-Tavera, Amy (OMB); Bolt, Gigi (OMB)
	Develop and deploy an annual survey of County departments regarding OMB's support of the business planning process.	4/23/2025	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			Horton-Tavera, Amy (OMB)
	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			Horton-Tavera, Amy (OMB)
	Purpose Driven Procurement Process Review	7/18/2024	Complete	🟢	🟢	Horton-Tavera, Amy (OMB); Morales, Mayra (OMB); Maxwell, Carlos (OMB)
Ensure the effective and fair disbursement of County General Fund grant funding in community	Develop and Issue New Ryan White RFP	3/14/2024	In Progress			Valle Schwenk, Carla (OMB); Wall, Daniel (OMB)
	Complete implementation of the new CBO competitive funding process.	3/14/2024	In Progress			Wall, Daniel (OMB)
Prepare budget that supports the County's mission	Evaluate existing systems (including BAT, RFRO, INFORMS (Commitment Control) and CBAT) to enhance customer experience and system functionality	3/14/2024	In Progress			Sarduy, John (OMB)
Promote development in distressed areas by monitoring and supporting CRAs	Annually review Community Redevelopment accomplishments, assessing redevelopment plan implementation and TIF investment return	3/14/2024	In Progress			Cao, Vivian (OMB)
Facilitate County departments transition to independent Constitutional Offices	Countywide: Facilitate creation of Constitutional Officers as per Amendment 10	12/18/2024	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			Wood, Arlesa (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			Wood, Arlesa (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			Wood, Arlesa (OMB)
Promote the use of Lean Six Sigma (LSS) techniques	Lean Six Sigma Coaching - Late Payments on Business Contracts	7/17/2024	Complete	🟢	🟢	Horton-Tavera, Amy (OMB); Morales, Mayra (OMB)
	Lean Six Sigma Coaching: Shannon Melendi Risk Reduction	7/17/2024	Complete	🟢	🟢	Morales, Mayra (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)
	Meet with departments to learn more about their emergency operations and provide recommendations to assist with overcoming challenges and issues.	4/10/2024	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	9/27/2024	Complete			Armas, Juan (OMB); Horton-Tavera, Amy (OMB)

Initiative	As Of	Status	Budget	Timing	Owners
WASD Fleet Overtime Review	5/22/2025	Complete	Within Budget	On Schedule	Arango Verhelst, Sandra (OMB); Morales, Mayra (OMB); Ferreira, Roy (OMB)

Initiative	As Of	Status	Budget	Timing	Owners
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	12/18/2024	In Progress			Lafarga, Ryan (OMB); Mas, Raul (OMB)
Make related policy and operational decisions and prepare for fiscal and operational impacts of the transition	12/18/2024	In Progress			Lafarga, Ryan (OMB); Mas, Raul (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.	12/18/2024	In Progress			Ferreira, Roy (OMB); Horton-Tavera, Amy (OMB)
Implement new Internal Grants Information Management System and Dashboard	12/18/2024	In Progress			Wall, Daniel (OMB)

