

# FL-510 NEEDS ASSESSMENT

# Homelessness Needs Assessment

Continuum of Care FL-510 (Northeast Florida)

Counties: Baker, Clay, Duval, Nassau

Date: March 2026

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## 1. Executive Summary

Homelessness in Northeast Florida continues to reflect a combination of **housing affordability gaps, behavioral health needs, economic instability, and systemic barriers to services**. While regional collaboration has improved, recent **state-level encampment regulations and local enforcement policies** have significantly reshaped how unsheltered homelessness is experienced and addressed.

The region faces a dual opportunity:

- **Reducing unsheltered homelessness in compliance with encampment laws**
- **Expanding housing and service capacity fast enough to prevent displacement without resolution**

As of early 2026, FL-510 is estimated to have:

- **Total homeless population: ~XX individuals**
- **Unsheltered population: ~X, X%**
- **Sheltered population: ~X**

This reflects:

- **A X% increase** since 20XX
- **A rise in unsheltered homelessness**, driven by housing costs and encampment enforcement

## 2. Regional Context

FL-510 includes:

- **Duval County (Jacksonville)** – Urban core, largest unsheltered population
- **Clay County** – Suburban/rural mix with limited shelter capacity
- **Nassau County** – Rural/coastal, tourism-driven economy
- **Baker County** – Rural, minimal formal social services infrastructure

## Key Characteristics:

- Increasing **rent burden and eviction rates**
- Limited **affordable housing inventory (<60% AMI)**
- High **inflow into homelessness from institutional systems** (jails, hospitals)
- Geographic disparities in **service access**

## Duval County (Jacksonville)

- **Total homeless:** ~XX
- **Unsheltered:** ~XX
- **Share of CoC population:** ~X%

### Key trends:

- Largest concentration of encampments
- Increasing inflow from evictions and hospital discharges
- High visibility of street homelessness downtown and urban core

## Clay County

- **Total homeless:** ~XX
- **Unsheltered:** ~XX

### Key trends:

- Hidden homelessness (vehicles, couch-surfing)
- Limited shelter capacity → spillover into Duval

## Nassau County

- **Total homeless:** ~XX
- **Unsheltered:** ~XX

### Key trends:

- Tourism economy creates seasonal instability
- Workforce housing shortage

## Baker County

- **Total homeless:** ~XX
- **Unsheltered:** ~XX

Key trends:

- Minimal formal services
- Strong reliance on informal/community support

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### 3. Subpopulation Estimates

Population Group	Estimated Size	Notes
Chronically Homeless	X	Majority unsheltered
Families with Children	X individuals X households	Growing segment
Women	X	Growing segment
Youth (18-24)	X	Underreported
Veterans	X	Some success, but inflow continues
Severe Mental Illness (SMI)	X	Major driver of chronic homelessness
Substance Use Disorder (SUD)	X	Often co-occurring

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## 3. Current Homelessness Landscape

### A. Population Overview

- Majority of individuals experiencing homelessness are:
  - Single adults (predominantly male, but rising female population)
  - Increasing number of families and youth
- Significant subpopulations:
  - Veterans
  - Individuals with serious mental illness (SMI)
  - Individuals with substance use disorders (SUD)
  - Chronically homeless individuals

### B. Unsheltered Homelessness

- Concentrated in:
  - Urban Jacksonville (Duval)
  - Hidden/rural encampments (Clay, Nassau, Baker)
- Encampments often located near:
  - Wooded areas
  - Underpasses
  - Abandoned properties

## 4. Impact of Encampment Laws

Recent Florida legislation restricting public camping and encampment has created several system pressures:

### A. Observed Impacts

- Increased displacement rather than resolution
- More frequent movement of unsheltered individuals
- Increased activity for law enforcement and outreach teams
- Reduced ability for providers to maintain consistent engagement

### B. System Challenges

- Insufficient shelter beds
- Lack of sufficient flow from shelter to home options
- Increased criminalization risks for unsheltered individuals
- Impact to Continuum of Care coordinated entry processes

## C. Compliance Considerations

Local jurisdictions must:

- Avoid enforcement when possible (e.g., lack of available shelter)
- Ensure adequate shelter or alternatives exist before displacement
- Balance public safety, sanitation, and human rights

## 5. Gaps and Needs

### A. Housing Gaps

- Severe shortage of:
  - Housing
  - Units affordable at extremely low income (ELI) levels
- Landlord participation remains limited

### Housing Market Pressures (Local Estimates)

#### Rental Market (2025–2026)

- Average rent (Duval County):
  - 1-bedroom: \$1,200 – \$1,500
  - 2-bedroom: \$1,400 – \$1,800
- Customary wage (housing affordability):
  - ~\$22–\$28/hour

#### Reality for Homeless Population

- Average income (unsheltered): <\$800/month
- SSI income: ~\$943/month (insufficient for market rent)

#### Affordable Housing Gap

- Estimated shortage:
  - 18,000+ units affordable at  $\leq 30\%$  AMI across region
- Vacancy rate for low-cost units: <3%

### B. Shelter System Gaps

#### Emergency Shelter

- Total beds: ~XX
- Average occupancy: X%
- Easy access beds: <X% of total

- Medical respite beds: XX
- Detox beds: XX
- 24/7 shelters: XX

### **Transitional Housing (TH)**

- Total beds: ~XX
- Need: XX annually

### **Rapid Re-Housing (RRH)**

- Households served annually: ~XX
- Need: XX annually

### **Permanent Supportive Housing (PSH)**

- Units available: ~XX
- Needed for chronic population: XX

## **C. Outreach & Engagement**

- Need for expansion of:
  - Street outreach teams
    - Active outreach workers: ~XX across region
    - Recommended need: XX
  - Multidisciplinary teams (behavioral health + housing)
- Difficulty tracking individuals due to encampment displacement

## **D. Behavioral Health**

- Limited access to:
  - Crisis stabilization
  - Long-term mental health care
  - Substance use treatment (especially detox beds)

## **E. Prevention & Diversion**

- Underfunded eviction prevention programs
- Limited flexible funding for diversion strategies

## **F. Rural Service Access**

- Transportation barriers in Baker, Nassau, and parts of Clay
- Few centralized service hubs

## 6. Encampment Impact

Since implementation of enforcement:

- TBD

Estimated population:

- Duval: ~XX individuals at any given time
- Other counties combined: ~XX

## 7. Inflow & Outflow Dynamics

### Monthly Inflow into Homelessness

- ~XX individuals/month

Main drivers:

- Evictions (~XX–XX%)
- Institutional discharge (~XX%)
- Job loss (~XX%)

### Monthly Exits to Housing

- ~XX individuals/month

Net growth trend: XX individuals/month

## 9. Data-Driven Strategic Priorities

### 12–24 Month Targets

- TBD

### Top 3 Immediate Needs

1. **XX+ additional shelter beds**
2. **XX+ housing units**
3. **Doubling outreach capacity**

## 10. Data & Evaluation

### Key Metrics to Track:

- Unsheltered homelessness rate
- Length of time homeless
- Returns to homelessness
- Shelter utilization
- Housing placement rates

### Needed Improvements:

- Real-time encampment tracking
- Cross-system data sharing (health, justice, housing)

## 11. Conclusion

FL-510 is at a pivotal moment, with recent policy shifts creating new opportunities to strengthen pathways from unsheltered homelessness to stable housing. Building on the community's ongoing commitment to housing-focused strategies, there is a renewed emphasis on expanding housing capacity, enhancing shelter access, and deepening coordinated outreach. By continuing to invest in these proven approaches, FL-510 can ensure that system responses lead to lasting stability, reducing displacement and supporting individuals in achieving permanent housing outcomes.

A balanced strategy—combining compliance, compassion, and housing investment—is essential to achieving long-term reductions in homelessness across Northeast Florida.

The data confirms that FL-510 is experiencing:

- A growing unsheltered population
- A significant housing supply deficit
- System opportunities amplified by encampment enforcement policies

Without scaling housing and services to match:

- Displacement cycles will continue
- System costs will rise
- Functional zero goals will remain out of reach

**Data clearly supports a housing-ready, capacity-expansion strategy as the most effective path forward.**

## Appendix A: Projects Under Development

- Sulzbacher Enterprise Village – Men’s Village
- First United Methodist Church – Young Adults Transitional Housing
- Operation Lifeline – Veteran’s Transitional Housing in Clay County
- Tunnel to Towers Foundation –housing and supportive services to approximately 125 Veterans
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- Appendix B: Definitions

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