

**Housing Authority of Avon Park
Board of Commissioners Regular Meeting**
North Central Heights Community Building
709 Juneberry Street, Avon Park, Fl.
Tuesday, October 18, 2016, 7:00 PM

AGENDA

- A. Opening Prayer, Roll Call by Secretary
- B. Public Comments/Presentations: None
- C. Consent Agenda
 - 1. Regular Board Meeting Minutes September 20, 2016.
 - 2. Occupancy Report; September 2016
 - 3. Lakeside Park I Transitional Housing FSS Program Report; September 2016
 - 4. TAR & Maintenance Reports; September 2016
 - 5. Fee Accounting Report; August 2016 and September Account Cash Analysis
Schedules APHA - Project Budgeted Income Statement Reports
- D. Secretary Reports & Old Business
 - 7. Project/Services Status Reports;
 - a. APHA Rental Assistance Demonstration (RAD) Conversion status report
 - b. Cornell Colony status report
 - c. 695 Palmetto St project
 - d. APHA budgets
- E. New Business;
 - 8. Personnel Policy revision
- F. Unfinished Business, Concerns of Commissioners
- G. Next Meeting: Regular Board Meeting; November15, 2016
- H. Adjournment

Any person who might wish to appeal any decision made by the Avon Park Housing Authority, in public hearing or meeting, is hereby advised that he/she will need a record of the proceedings, and for such purpose, he/she may need to ensure that a verbatim record of the proceedings is made which will include the testimony and evidence upon which such an appeal is to be based. In accordance with the American Disabilities Act and Section 286.26 Florida Statutes, any person with disabilities requiring reasonable accommodations to participate in this meeting should call the Housing Authority offices five days prior to the meeting.

THE HOUSING AUTHORITY OF AVON PARK
BOARD OF COMMISSIONERS REGULAR MEETING MINUTES
North Central Heights Community Center
709 Juneberry Street, Avon Park, FL 33825

September 20, 2016, 7:00 P.M.

A. Opening/Roll Call: Chairman Roberts called the Board Meeting to order and asked Commissioner Bill Day to offer the prayer. Following, the Secretary called the member attendance roll: Commissioners Present: Commissioners Lester Roberts, Greg Wade, & Bill Day. Commissioners with excused absences; Cameron Barnard and Michael Eldred. Also in attendance; APHA staff CEO Tracey Rudy, Director of Housing Bea Gillians, Facilities Mgr. David Herbert and City Council Liaison Dora Smith. CEO Rudy declared a Quorum was present and Chair Roberts called the meeting to Order at 7:00 pm.

B. Public Comments/Presentations: None

C. Consent Agenda: Chairman Roberts called for a motion to approve the Consent Agenda as circulated, moved by Commissioner Wade seconded by Commissioner Eldred to approve the Consent Agenda; motion carried unanimously.

D. Secretary Report & Old Business:

Projects Report; The ED provided the Board with a summary narrative & general performance status of each of the respective projects.

Rental Assistance Demonstration Application: CEO Rudy informed the Board that the final loan documents had been signed and could now be submitted to HUD. Upon HUD review the project would then move to closing which is expected to happen in 30-60 days.

Cornell Colony; project development status report; CEO Rudy informed the Board that there were 37 units occupied and the target was 90% occupancy by end of month. Upon achieving 90% occupancy there would be a test period to remain at 90% for 90 days. After successful completion of the test phase we would close on the development phase, receive the remaining developer fee and transfer to permanent financing.

695 Palmetto Ave: CEO Rudy presented final site plans from Cool and Cobb Engineering to the Board and discussed some critical aspects of the current plans. City Council Liaison Dora Smith inquired about the plan for the materials for the units and noted that the City preferred the structures at Cornell to those at North Central Heights.

E. New Business:

A. Resolution No. 16-05; CEO Rudy presented resolution 16-05, ratifying the change in title from Executive Director to CEO and authorizing the CEO to serve as the Secretary of the Avon Park Housing Development Corporation. Chairman Roberts called for a motion to approve the resolution as presented, moved by Commissioner Wade and seconded by Commissioner Eldred the motion carried unanimously.

B. Strategic Plan Review and acceptance; CEO Rudy presented the Board with the APHA strategic plans with revisions made as a result of the August Strategic Planning Workshop. The plan was accepted by consensus.

- C. 2017 Budgeting Process: CEO Rudy informed the Board that the 2017 budgeting process had begun and that she would be presenting them with revised 2016 and draft 2017 budgets at the next meeting. Commissioner Roberts requested that Rudy request that the Fee Accountant attend a future meeting during the budgeting process.

F. Unfinished Business, Concerns of Commissioners;

Commissioner Day and Chairman Roberts and CEO Rudy discussed their respective take-aways from the FAHRO conference in August. Items noted included the quality of the information presented and the reduction in the number of vendors attending the conferences.

Chairman Roberts discussed the length of the APHA's waiting list and asked the Board for consensus for direction to the CEO to continue to explore expansion in affordable housing opportunities. There was consensus.

Being no further business to come before the Board Chair adjourned the meeting at 7:25 pm.

ADOPTED THIS 18th DAY OF OCTOBER 2016

Accepted _____

Attest _____
SEAL

OCCUPANCY/VACANCY REPORT

September 2016

Public Housing

Delaney Heights

<u>Unit #</u>	<u>Brms.</u>	<u>Move-Out</u>	<u>Move-In Date</u>	<u># days in Mgmt</u>	<u>#days in Maint</u>	<u># vacancydays</u>	<u>Reason for Vacancy</u>
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TOTAL DELANEY HEIGHTS VACANT – 0

Lakeside Park I

<u>Unit #</u>	<u>Brms.</u>	<u>Move-Out</u>	<u>Move-In Date</u>	<u># days in Mgmt</u>	<u>#days in Maint</u>	<u># vacancydays</u>	<u>Reason for Vacancy</u>
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407(1317)	3	8/30	9/28	27	3	30	Moved to Cornell
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TOTAL LAKESIDE PARK I VACANT – 0

Lakeside Park II

<u>Unit #</u>	<u>Brms.</u>	<u>Move-Out</u>	<u>Move-In Date</u>	<u># days in Mgmt</u>	<u>#days in Maint</u>	<u># vacancydays</u>	<u>Reason for Vacancy</u>
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207(232)	1	6/1/15			21		Tax fraud
222(213)	3	6/4/15			19		Tax fraud
102(202)	2	7/1/15			1		30 day notice not given
313(350)	1	7/31/15			7		Transferred to NCH
329(317)	1	8/18/15			6		Abandoned unit
309(334)	3	8/31/15			3		Moved out of town
214(245)	2	8/31/15			8		Moved in with aunt/medical
310(338)	2	9/3/15			5		Criminal activity
223(207)	4	10/19/15			7		Eviction/unauthorized guest
325(333)	1	12/10/15			4		No notice given
322(345)	3	1/19/16			1		Abandoned unit
306(322)	2	2/16/16			1		Evicted
215(241)	3	4/1/16			1		Abandoned unit
303(310)	3	4/21/16			4		Moved to Highlands Apts
302(306)	3	5/10/16			1		Tax fraud
225(201)	3	5/10/16			1		Moving in with daughter
101(200)	4	5/19/16			1		Lease violation/3 pets unauthorized
218(233)	3	7/5/16					Unreported income
314(354)	2	7/12/16					Moved to Cornell Colony
103(204)	3	7/19/16					Moved to Cornell Colony
216(239)	4	8/9/16					Evicted/tattoo business in unit

TOTAL LAKESIDE PARK II VACANT – 21

Submitted by: Penny Pieratt, Comptroller

OCCUPANCY/VACANCY REPORT
September 2016

Ridgedale

<u>Unit #</u>	<u>Brms.</u>	<u>Move-Out</u>	<u>Move-In Date</u>	<u># days in Mgmt</u>	<u>#days in Maint</u>	<u># vacancydays</u>	<u>Reason for Vacancy</u>
20(706)	4	8/31					Lease violations
3(740)	2	9/12					Moved to NCH
8(730)	3	9/16					Moved to Cornell
15(716)	2	9/30					Cannot afford

TOTAL RIDGEDALE VACANT—4

North Central Heights I - (40 units total)

<u>Unit#</u>	<u>Brms</u>	<u>Move-Out</u>	<u>Move-In</u>	<u># days in Mgmt</u>	<u>#days in Maint</u>	<u># vacancydays</u>	<u>Reason for Vacancy</u>
636	2	7/31	9/8	31	15	40	Moved into 3 bdrm NCH II/8/1
611	2	8/11					Abandoned Unit
617	2	8/22	9/7	8	9	17	Abandoned Unit
TOTAL NCH I VACANT—1							

North Central Heights II – (32 units total)

<u>Unit #</u>	<u>Brms</u>	<u>Move-Out</u>	<u>Move-In</u>	<u># days in Mgmt</u>	<u>#days in Maint</u>	<u>#vacancy days</u>	<u>Reason for Vacancy</u>
732	3	9/6	9/27	8	14	22	Criminal Activity/drugs
738	4	9/28					Non payment rent
TOTAL NCH II VACANT—1							

OCCUPANCY/VACANCY REPORT
September 2016

<u>Cornell Colony – (44 units total)</u>						
<u>Unit #</u>	<u>Brms</u>	<u>Move-Out</u>	<u>Move-In</u>	<u># days in Mgmt</u>	<u>#days in Maint</u>	<u>#vacancy days</u>
38197	3		9/1			
38172	3		9/6			
38222	3		9/9			
38228	3	9/15	9/27	11	1	12
38201	3		9/12			Daycare issues
38236	3		9/12			
38282	3		9/13			
38196	3		9/16			
38271	3		9/19			
38188	3		9/23			
38210	3		9/23			
38218	3		9/23			
38278	3		9/26			
38288	3		9/28			
38232	3		9/30			
TOTAL CORNELL COLONY VACANT – 3						

OCCUPANCY/VACANCY REPORT
September 2016

Intent to Vacate –

Evictions-

Abandoned Units –

WAITING LIST

LAKESIDE PARK II

1-BRM	123
2-BRM	108
3-BRM	65
4-BRM	24
5-BRM	9
TOTAL	<u>329</u>

DELANEY HEIGHTS

1-BRM	<u>134</u>
TOTAL	<u>134</u>

RIDGE DALE

1-BRM	359
2-BRM	361
3-BRM	258
4-BRM	128
TOTAL	<u>1106</u>

NORTH CENTRAL HEIGHTS

2-BRM	488
3-BRM	363
4-BRM	168
	<u>1019</u>

LAKESIDE PARK I

1-BRM	25
2-BRM	199
3-BRM	136
4-BRM	53
5-BRM	15
TOTAL	<u>428</u>

CORNELL COLONY

3-BRM	<u>329</u>
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AVON PARK TRANSITIONAL HOUSING

September/October 2016

Monthly Board Report

Case Management Updates

FSS Clients meetings and assessments with FSS Case Manager; Monthly

FSS Enrollment- 24 Participating Households

- Lakeside Park – 4 Clients (1 Resident has successfully transferred to North Central Heights)
- Emergency Transitional Housing- 20 Clients – Enrolled in FSS
- ETH Resident transitioned over to Cornell Colony.
- 9 Resident's receiving services that reside in APHA's communities but are not enrolled in the FSS program.

Property Updates:

No Vacancies

Training Sessions for September/October 2016

- September 21, 2016: "Foodborne Illness Is Serious Business", training workshop at ETH's conference room.
- October 25, 2016: "Comparison Shopping on a Tight Budget- Learn to be Thrifty", training workshop at ETH's conference room.

Resident Activities

- Every Friday of each month: Crossroads Community Church drops off Bread, Rolls, Pastries, to the ETH office for our residents. These are donated to the Church from Publix.
- September/October 2016: Weekly Community Garden Activities ("Beans & Peas to Harvest in October")
- September 23, 2016: "Couponing 101", 3:00pm – 4:00pm at ETH Office
- September 28, 2016: "Emergency Preparedness" presented by Scott Canady, Emergency Management Director of Highlands County, at the NCH's Community Center.
- October 12, 2016: Deadline to hand in Sign Up Requests "Christmas in the Highlands" Christmas Celebration on December 25, 2016. Food, Gifts, and Festivities. Free to all registered guests.
- October 17, 18, 19, 27, 28, 2016: Salvation Army "Christmas Angel Tree" applications must be completed on days listed.
- October 27, 2016: Halloween Activity "Get Your Spook On" 6:00pm at the NCH's Community Center.

Employment Update:

- 11 of our 20 HOUSEHOLDS currently employed.
- Lakeside Park- 1 out of 4 HOUSEHOLDS currently employed.

Education Update:

3 ETH Residents enrolled in Secondary Education @ SFSC.

1 ETH Resident enrolled at University of South Florida, Bachelors of Science curriculum.

2 ETH Residents enrolled in GED program @ SFSC.

1 ETH Resident enrolled in parenting classes at Choices Pregnancy Care Center

1 ETH Resident enrolled in Cosmetology studies, **Graduated 7/25/2016, Received State of Florida Nail Technician License.**

1 FSS Resident enrolled in Secondary Education @ SFSC.

1 FSS Resident enrolled in SFSC's Dental Program.

1 FSS Resident enrolled in GED program @ SFSC.

1 FSS Resident completed an Internship program in CPA/Accounting with a local CPA/Accounting Firm.

1 FSS Resident participated in the Future Business Leaders of America, National Conference in Atlanta, GA.
(Study Programs Include: Medical/Office Management/Business Management/Law Enforcement/Human Services, Dental Assistant Program)

2 Resident's have obtained their Florida State CNA Certification.

Community Partners:

Emergency Preparedness Management Services	On-going
Christmas in the Highlands	On-going
Crossroads Community Church Partnership	On-going
Aktion Club	On-going
Florida Health Department	On-going
Samaritians Touch Care Center	On-going
Avon Park Public Safety training programs	On-going
Peace River Center, Helping/Healing/Offering Hope	On-going
USF, Center for Autism & Related disabilities	On-going
Tri-County P.A.T.H. Program	On-going
Choices Pregnancy Care Center Services	On-going
ALPI/GED/Secondary Funding Services	On-going
Early Learning Coalition Child Care Services	On-going
Highlands County Coalition for the Homeless Services	On-going
RCMA; Enrollment announcements	On-going
New Beginnings TCM Heartland	On-going
AARP, Grant funded Clerical/Office assistance	On-going
Salvation Army Community Assistance programs	On-going
Team Jesus Wins	
Cornerstone Hospice	
All Learning Center, new provider in Avon Park	
Florida Prosperity Partnership, educational training programs.	
Habitat for Humanity	
HAVEN Home Health, Community Outreach Specialists	

APHA MISSION-The Mission of the Avon Park Housing Authority is to assist low-income families with safe, decent and affordable housing opportunities as they strive to achieve self-sufficiency and improve the quality of their lives. The Housing Authority will create and maintain partnerships with its clients and appropriate community agencies in order to accomplish this mission.

Tenants Accounts Receivable
September 30, 2016

Delaney Heights

Serena Austin	\$ 4.44	Electric
Melisande Avila	200.00	Pet deposit (making pmts)
Sylvester Evans	66.00	August Rent
Glory Gibbs	13.95	Electric
DH Total	\$284.39	

Lakeside Park I

Khaliliah Debrown	\$1,025.18	Rent & Balance on late fee
Terranie Hill	3.25	Balance on Work order
Lakeside I Total	\$1,028.43	

Lakeside Park II

Marta Rivera	\$8.50	Garbage
Lakeside II Total	\$8.50	

NCH I

NCH I Total \$0.00

NCH II

Awilda Burgos	\$ 24.49	Work Order
Rokeisha Johnson	20.00	Work order
Kianalee Garcia	300.00	Security deposit
Naketa McQueen	950.97	Rent and Work order
Nelida Perez	150.00	Pet deposit (making pmts)
NCH II Total	\$1,445.46	

Cornell Colony

Francisco Pellon	\$200.00	Pet deposit (making pmts)
Elizabeth Sisson	300.00	Security deposit (making pmts)
CORNELL Total	\$500.00	

Ridgedale

Linette Figueroa	\$ 40.00	Work order
Tykesha McNeil	26.00	Late fees
Abimael Morales	138.00	Balance on rent (making pmts)
Ashley Tate	122.60	Balance on rent (making pmts)
RD Total	\$326.60	

GRAND TOTAL \$3,593.38

***WRITE OFFS for Delaney**
Total Delaney \$0

***WRITE OFFS for NCH**
Valerie Hunts
Total NCH \$122.52

***WRITE OFFS for Ridgedale**
Total RD \$0

***WRITE OFFS for Lakeside Park I**
Total LPI \$0

***WRITE OFFS for Lakeside Park II**
Total LPII \$0

Approved—Tracey Rudy, Chief Executive Officer

Submitted by: Penny Pieratt, Comptroller

September 2016**MAINTENANCE MONTHLY REPORT****Daily tasks:**

General cleaning of Admin./Maintenance Bld. & grounds, work orders.

Special Work:**Preventive Maintenance:**

Work from preventive maintenance inspections are on-going. 77 hours were taken during the month of September for sick, annual and holiday leave.

Delaney Heights Preventive/Annual Inspections	4
Lakeside I Preventive Maintenance Inspections	1
Lakeside Park II Preventive/Annual Inspections	4
Ridgedale Preventive/Annual Inspections	1
North Central Heights I Preventive/AI	5
North Central Heights II Preventive/AI	4
Cornell Colony Preventive/AI	2
Delaney Heights Vacancies	0
Lakeside Park I Vacancies	1
Lakeside Park II Vacancies	0
Ridgedale Vacancies	2
North Central Heights I Vacancies	0
North Central Heights II Vacancies	1
Cornell Colony Vacancies	1
Delaney Heights Move Ins	0
Lakeside Park I Move Ins	1
Lakeside Park II Move-In's	0
Ridgedale Move Ins	0
North Central Heights I Move Ins	2
North Central Heights II Move Ins	1
Cornell Colony Move Ins	15
Delaney Heights Move Outs	0
Lakeside Park I Move Outs	0
Lakeside Park II Move-Out's	0
Ridgedale Move Outs	3
North Central Heights I Move Outs	0
North Central Heights II Move Outs	2
Cornell Colony Move Outs	1

AVON PARK
HOUSING AUTHORITY

FISCAL YEAR ENDING DECEMBER 31, 2016

CONSOLIDATED

Financial Statements

August 31, 2016

AVON PARK HOUSING AUTHORITY

FINANCIAL STATEMENT SUMMARY

PUBLIC HOUSING

INCOME

1. Total income is down by (\$37,341). Total tenant rental revenue is up by \$9,394. Other tenant revenue is down by (\$6,291).

EXPENSES

2. Total operating expense are down by (\$22,413) compared to the budgeted amount.

3. Administrative expenses are up by \$55,316.

4. Maintenance expenses are down by (\$38,984).

5. Utility expenses are down by (\$3,904).

6. Total insurance expense is up by \$3,360.

7. Total General expense is down by (\$617).

Public Housing's projected net income is scheduled YTD to be \$11,650. Current net income is \$8,957.

NORTH CENTRAL HEIGHTS I

INCOME

1. Total income is up by \$28,146 compared to budgeted amounts. Total tenant revenue is up by \$14,073.

EXPENSES

2. Total operating expense is down by (\$4,772) compared to the budgeted amount.

3. Administrative expenses are up by \$9,562.

4. Maintenance expenses are down by (\$3,835).

5. Utility expense is down (\$909).

6. Total insurance expense is down by (\$1,122).

7. Total General expense is down by (\$8,637).

North Central Heights I projected net income is scheduled YTD to be \$2,497. Current net income is \$21,372.

AVON PARK HOUSING AUTHORITY

FINANCIAL STATEMENT SUMMARY

NORTH CENTRAL Height II

INCOME

1. Total income is up by \$6,606 compared to budgeted amounts. Total tenant revenue is up by \$6,923.

EXPENSES

2. Total operating expense is up by \$22,804, compared to the budgeted amount.
3. Administrative expenses are up by \$36,111.
4. Maintenance expenses are down by (\$8,054).
5. Utility expense is down by (\$649).
6. Total insurance expense is down by (\$1,252).
7. Total General expense is up down (\$3,521).

North Central Heights II projected net income is scheduled YTD to be \$1,810. Current net income is (\$14,388).

RIDGEDALE

INCOME

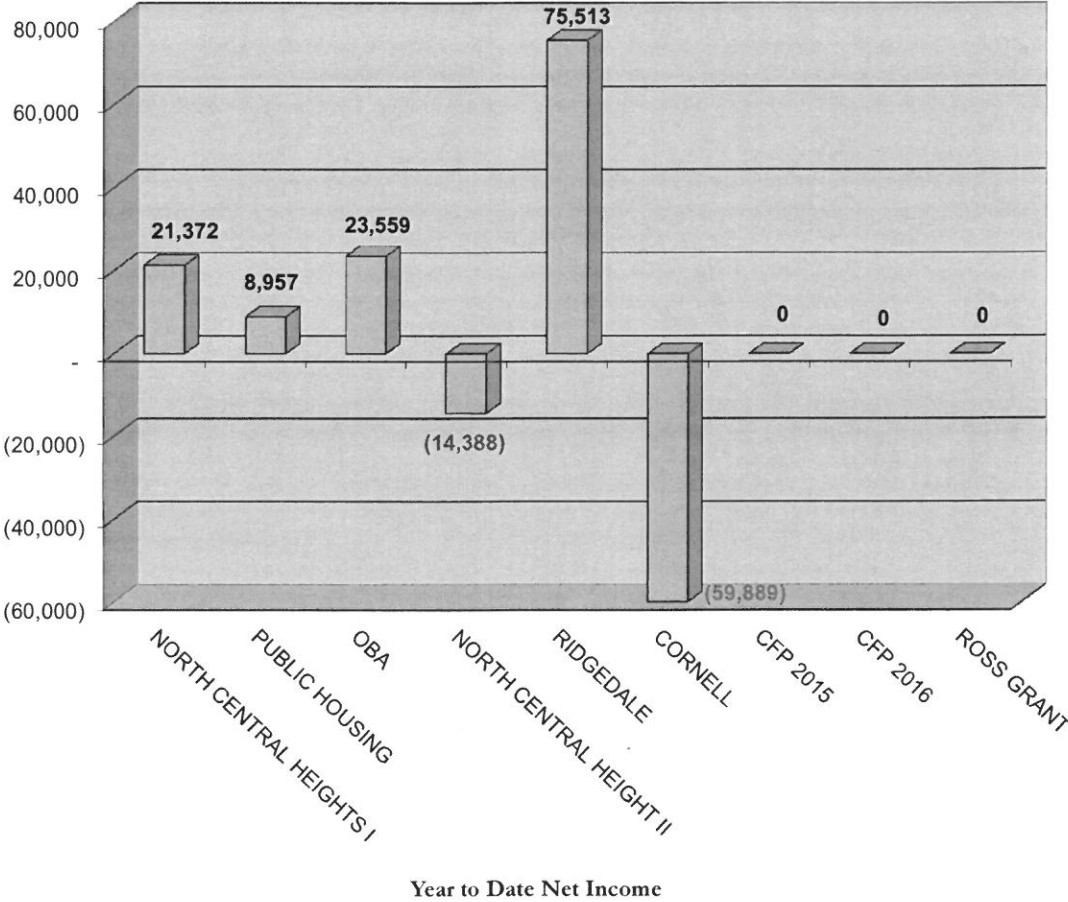
1. Total income is up by \$6,331 compared to budgeted amounts. Total tenant revenue is down by (\$5,452).
Grant subsidy is up compared to budgeted amounts by \$14,842. Other revenue is down by (\$3,057).

EXPENSES

2. Total operating expense is up by \$1,071 compared to the budgeted amount.
3. Administrative expense is up by \$9,281.
4. Maintenance expenses are up by \$3,080.
5. Utility expense is down (\$4,275).
6. Total insurance expense is down by (\$2,336).
7. Total General expense are up by (\$4,639).

Ridgedale's projected net income is scheduled YTD to be \$70,254. Current net income is \$75,513.

Avon Park Housing Authority



AVON PARK HOUSING AUTHORITY
SCHEDULE OF CASH/INVESTMENT ACCOUNT BALANCES
AS OF August 31, 2016

PUBLIC HOUSING

1111.01 GENERAL FUND CHECKING	195,214
1111.40 FSS ESCROW	4,378
1111.06 UTILITY DEPOSIT ESCROW FUND	3,000
1111.09 S8 FUNDS	-
1114.00 SECURITY DEPOSITS	25,745
1117.00 PETTY CASH	100
1162.10 INVESTMENTS - CD HIGHLANDS BNK	43,222
1162.01 LAKESIDE PARK 1 ESCROW	1,972
1162.02 LAKESIDE PARK 1 RESERVES	17,894
1162.60 NEW INVESTMENT ACCOUNT	1,096,660

TOTAL 1,388,186

OTHER BUSINESS ACTIVITY

1111.3 APHDC--OBA	10,889
1111.50 LAKE SIDE PARK - RAD	100

TOTAL 10,989

CORNELL COLONY

1111.40 GENERAL FUND-CORNELL COLONY	12,058
1111.60 CORNELL COLONY - OP DEF RESERVES	100
1114.00 CORNELL COLONY - SECURITY DEPOSITS	6,050

TOTAL 18,208

NORTH CENTRAL HEIGHTS I

1111.01 GENERAL FUND CHECKING	32,710
1114.00 SECURITY DEPOSITS	12,850
1162.1 ESCROW - BONNEVILLE TAXES	20,116
1162.11 ESCROW-BONNEVILLE-INSURANCE	94,849
1162.12 ESCROW-BONNEVILLE-REPL RS	55,698

TOTAL 216,223

NORTH CENTRAL HEIGHT II

1111.01 GENERAL FUND CHECKING	4,409
1114.00 SECURITY DEPOSITS	9,900
1162.1 ESCROW-BONNEVILLE TAXES	16,120
1162.11 ESCROW-BONNEVILLE - INSURANCE	73,439
1162.12 ESCROW-BONNEVILLE-REPL RES	44,568

TOTAL 148,436

RIDGEDALE

1111.01 GENERAL FUND CHECKING	59,406
1114.00 SECURITY DEPOSITS	7,292
1162.05 ESCROW MIP	4,789
1162.06 ESCROW RESERVE REPLACEMENT	89,529
1162.07 ESCROW INSURANCE	4,875
1162.08 RESIDUAL RECEIPTS RESERVERS	406,441

TOTAL 572,332

GRAND TOTAL CASH ACCOUNTS 2,354,374

AVON PARK HOUSING AUTHORITY
SCHEDULE OF UNRESTRICTED NET ASSETS
AS OF August 31, 2016

NORTH CENTRAL HEIGHTS I

UNRESTRICTED NET ASSETS	48,443
YEAR TO DATE EARNINGS	21,372
TOTAL	<u>69,815</u>

PUBLIC HOUSING

UNRESTRICTED NET ASSETS	1,427,936
YEAR TO DATE EARNINGS	8,957
TOTAL	<u>1,436,893</u>

OTHER BUSINESS

UNRESTRICTED NET ASSETS	60,126
YEAR TO DATE EARNINGS	23,559
TOTAL	<u>83,684</u>

CORNELL COLONY

UNRESTRICTED NET ASSETS	(10,797)
YEAR TO DATE EARNINGS	(49,092)
TOTAL	<u>(59,889)</u>

NORTH CENTRAL HEIGHTS II

UNRESTRICTED NET ASSETS	34,715
YEAR TO DATE EARNINGS	(14,388)
TOTAL	<u>20,327</u>

RIDGEDALE

UNRESTRICTED NET ASSETS	115,389
YEAR TO DATE EARNINGS	75,513
TOTAL	<u>190,902</u>

CAPITAL FUND 2016

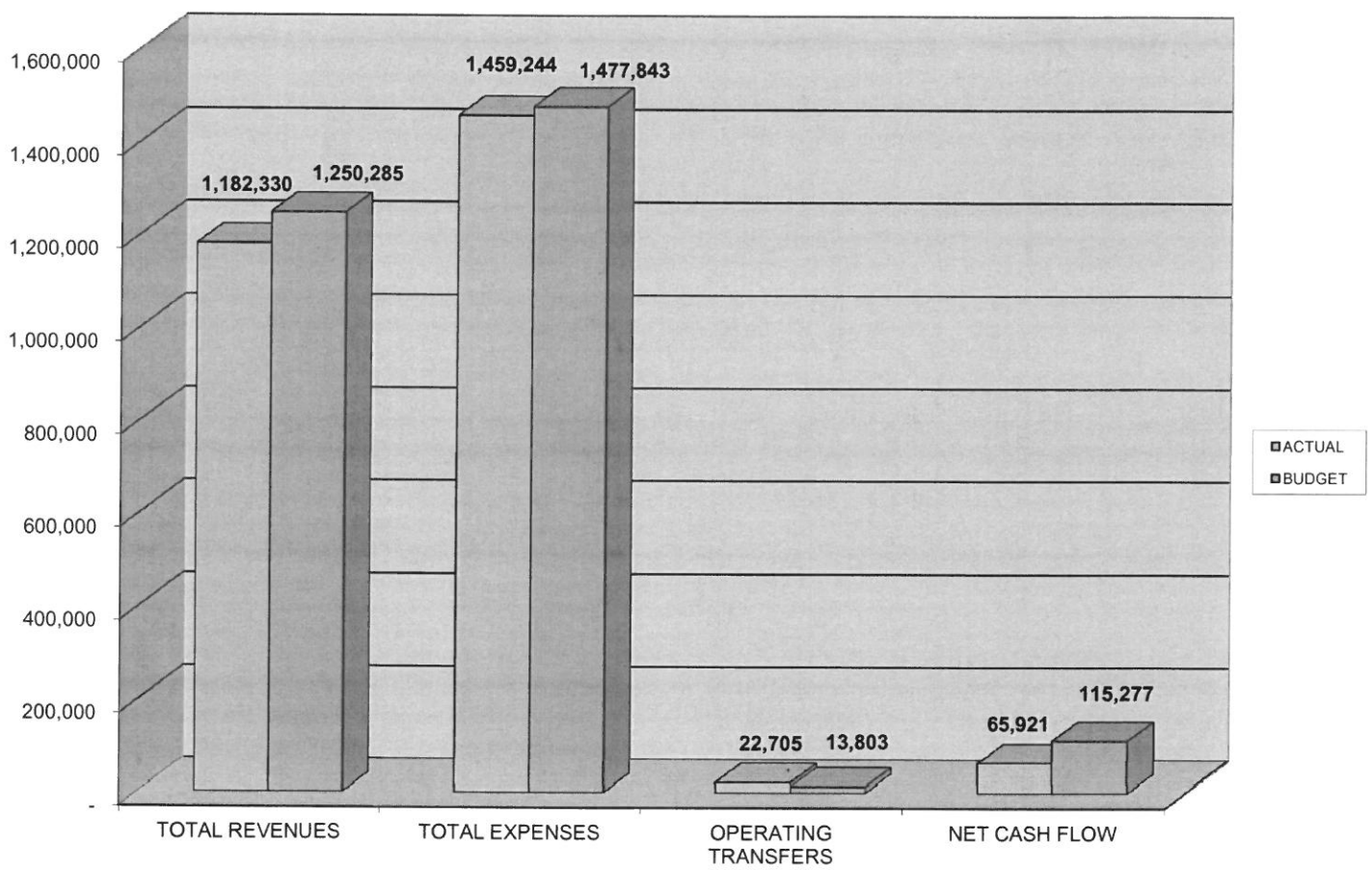
UNRESTRICTED NET ASSETS	-
YEAR TO DATE EARNINGS	-
TOTAL	<u>-</u>

CAPITAL FUND 2015

UNRESTRICTED NET ASSETS	-
YEAR TO DATE EARNINGS	-
TOTAL	<u>-</u>

TOTAL RESERVE BALANCES **1,741,732**

APHA CONSOLIDATED



APHA CONSOLIDATED- BALANCE SHEET

ASSETS

Current Assets:	
Cash	
111	Unrestricted 1,411,646
115	Cash - Restricted for Payment of Current Liabilities -
112	Cash - Restricted Mod and Development 134,127
113	Cash - Other restricted 27,245
114	Cash - Tenant Security Deposits 61,837
100	Total Cash 1,634,855
Receivables	
121	Accounts Receivable - PHA Projects -
122	Accounts Receivable - HUD Other Projects -
124	Accounts Receivable - Other Government 70,104
125	Accounts Receivable - Miscellaneous 21,796
126	Accounts Receivable - Tenants Dwelling Rents (3,021)
126.1	Allowance for Doubtful Accounts - Dwelling Rents (951)
126.2	Allowance for Doubtful Accounts - Other -
127	Notes and Mortgages Receivable - Current 16,000
128	Fraud Recovery -
128.1	Allowance for Doubtful Accounts - Fraud -
129	Accrued Interest Receivable -
120	Total Receivables - Net of Allowances for doubtful accts 103,927
131	Investments - Unrestricted -
135	Investments - Restricted for Payments of Current Liabilities -
132	Investments - Restricted 719,518
142	Prepaid Expenses and Other Assets 68,055
143	Inventories -
143.1	Allowance for Obsolete Inventory -
144	Interprogram Due From 81,903
145	Assets Held for Sale -
146	Amounts To Be Provided -
	Total Other Current Assets 869,476
150	Total Current Assets 2,608,259
Non-current Assets:	
Fixed Assets	
161	Land 1,492,993
168	Infrastructure 358,482
162	Buildings 18,043,934
163	Furniture, Equipment & Machinery- Dwellings 49,935
164	Furniture, Equipment & Machinery - Administration 201,539
165	Leasehold Improvements -
166	Accumulated Dpcciation (5,637,877)
167	Construction in Progress 5,589,630
160	Total Fixed Assets - Net of Accumulated Depreciation 20,098,638
171	Notes, Loans, Mortgages Receivable - Non Current -
172	Notes, Loans, Mortgages Receivable - Non Current - Past Due -
173	Grants Receivable - Non Current -
174	Other Assets -
176	Investments in Joint Ventures -
180	Total Non-Current Assets -
190	Total Assets 22,706,897

LIABILITIES AND EQUITY

Current Liabilities:	
311	Bank Overdraft -
312	Accounts Payable <= 90 Days 5,992
313	Accounts payable >90 Days Past Due -
321	Accrued Wage/Payroll Taxes Payable 2,124
322	Accrued Compensated Absences - Current Portion 16,398
324	Accrued Contingency Liability -
325	Accrued Interest Payable -
331	Accounts Payable - HUD PHA Programs -
332	Accounts Payable - PHA Projects -
333	Accounts Payable - Other Government 6,423
341	Tenant Security Deposits 61,837
342	Deferred Revenue -
343	Current Portion of Long-term Debt - Capital Projects 62,901
344	Current Portion of Long-term Debt - Operating Borrowings -
348	Loan Liability - Current -
345	Other Current Liabilities -
346	Accrued Liabilities - Other 4,378
347	Interprogram Due To 81,903
310	Total Current Liabilities 241,956
Non-current Liabilities:	
351	Long-term Debt, Net of Current - Capital Projects 20,483,163
352	Long-term Debt, Net of Current - Operating Borrowings -
354	Accrued Compensated Absences - Non Current 11,308
355	Loan Liability - Non Current 78,471
353	Noncurrent Liabilities - Other -
350	Total Noncurrent Liabilities 20,572,942
300	Total Liabilities 20,814,899
Equity:	
Contributed Capital	
501	Investment in General Fixed Assets -
502	Project Notes (HUD) -
503	Long-term Debt - HUD Guaranteed -
504	Net HUD PHA Contributions -
505	Other HUD Contributions -
507	Other Contributions -
508	Total Contributed Capital -
508.1	Invested in Capital Assets, Net of Related Debt (525,898)
Reserved Fund Balance:	
509	Fund Balance Reserved for Encumbrances/ Designated Fund Balance -
510	Fund Balance Reserved for Capital Activities -
511	Total Reserved Fund Balance -
511.1	Restricted Net Assets 880,890
512	Undesignated Fund Balance/Retained Earnings -
512.1	Unrestricted Net Assets 1,537,005
513	Total Equity 1,891,998
600	Total Liabilities and Equity 22,706,897

APHA CONSOLIDATED

LINE	ACCT		CURRENT	CURRENT		% OF	YEAR	YEAR		% OF	ANNUAL	BUDGET
ITEM	#	DESCRIPTION	MONTH	MONTH		MTD	TO DATE	TO DATE		YTD	BUDGET	BALANCE
REVENUE			ACTUAL	BUDGET	DIFF	BUDGET	ACTUAL	BUDGET	DIFF	BUDGET	BUDGET	REMAINING
OPERATING INCOME												
703	3110	GROSS POTENTIAL RENT	50,503	60,564	(10,060)	83%	387,943	484,509	(96,566)	80%	726,764	338,821
		NET TENANT REVENUE	50,503	60,564	(10,060)	83%	387,943	484,509	(96,566)	80%	726,764	338,821
3401		TENANT REVENUE - OTHER	2,552	2,859	(307)	89%	19,180	22,873	(3,693)	84%	34,310	15,130
3404		TENANT REVENUE - EXCESS UTILITY	-	-	-	-	-	-	-	-	-	-
3430		TENANT REVENUE - MAINTENANCE	-	-	-	-	-	-	-	-	-	-
3450		TENANT REVENUE - LATE CHARGES	-	-	-	-	-	-	-	-	-	-
3431		NET OPERATING REVENUE	53,055	63,423	(10,368)	84%	407,124	507,383	(100,259)	80%	761,074	353,950
706		HUD PHA OPERATING GRANT CFP	36,532	53,881	(17,349)	68%	455,693	431,048	24,645	106%	646,572	190,879
708		OTHER GOVERNMENT GRANTS	32,166	27,417	4,749	117%	243,083	219,333	23,750	111%	329,000	85,917
711		INVESTMENT INCOME - UNRESTRICTED	175	205	(31)	85%	1,660	1,643	17	101%	2,465	805
		MANAGEMENT FEE INCOME	5,239	5,386	(147)	97%	39,800	43,091	(3,292)	92%	64,637	24,837
		BOOKKEEPING FEE INCOME	-	-	-	-	-	-	-	-	-	-
		ASSET MANAGEMENT FEE INCOME	-	-	-	-	-	-	-	-	-	-
714		FRAUD RECOVERY	-	-	-	-	-	-	-	-	-	-
715		OTHER REVENUE	2,203	5,967	(3,764)	37%	34,613	47,733	(13,121)	73%	71,600	36,987
720		INVESTMENT INCOME - RESTRICTED	42	7	35	629%	357	53	304	670%	80	(277)
700		TOTAL REVENUES	129,412	156,286	(26,874)	83%	1,182,330	1,250,285	(67,955)	95%	1,875,428	693,098
OPERATING EXPENDITURES												
ADMINISTRATIVE												
911	4110	ADMINISTRATIVE SALARIES	46,646	16,680	29,966	280%	177,573	133,440	44,133	133%	200,160	22,587
912	4182	EBC - ADMIN	7,469	7,521	(52)	99%	67,345	60,167	7,177	112%	90,251	22,906
4171		AUDITING FEES	1,450	2,683	(1,233)	54%	19,975	21,467	(1,492)	93%	32,200	12,225
		MANAGEMENT FEES	3,238	5,386	(2,148)	60%	37,799	43,091	(5,293)	88%	64,637	26,838
		BOOKKEEPING FEES	-	-	-	-	-	-	-	-	-	-
		ADVERTISING & MARKETING	1,077	-	1,077	-	5,976	-	5,976	-	-	(5,976)
		OFFICE EXPENSE	-	-	-	-	-	-	-	-	-	-
		LEGAL EXPENSE	-	-	-	-	-	-	-	-	-	-
		TRAVEL	-	-	-	-	-	-	-	-	-	-
916	4190	OTHER	16,617	11,531	5,086	144%	126,517	92,244	34,273	137%	138,366	11,849
		TOTAL ADMINISTRATIVE	76,497	43,801	32,696	175%	435,184	350,409	84,775	124%	525,614	90,430
TENANT SERVICES												
921	4210	SALARIES	-	2,881	(2,881)	0%	6,720	23,047	(16,327)	29%	34,570	27,850
923	4222	EBC - TNT SVCS	-	1,778	(1,778)	0%	2,190	14,222	(12,032)	15%	21,333	19,143
924	4230	OTHER	140	291	(151)	48%	1,979	2,327	(348)	85%	3,490	1,511
		TOTAL TENANT SERVICES	140	4,949	(4,809)	3%	10,889	39,595	(28,707)	28%	59,393	48,504
UTILITIES												
931	4310	WATER	1,089	1,913	(825)	57%	7,645	15,307	(7,661)	50%	22,960	15,315
932	4320	ELECTRICITY	5,524	3,975	1,549	139%	30,694	31,800	(1,106)	97%	47,700	17,006
933	4330	NATURAL GAS	60	117	(56)	52%	721	933	(212)	77%	1,400	679
938	4390	SEWER AND OTHER	1,752	2,230	(478)	79%	12,221	17,840	(5,619)	69%	26,760	14,539
		TOTAL UTILITIES	8,426	8,235	191	102%	51,281	65,880	(14,599)	78%	98,820	47,539

APHA CONSOLIDATED

LINE	ACCT		CURRENT	CURRENT		% OF	YEAR	YEAR		% OF		BUDGET
ITEM	#	DESCRIPTION	MONTH	MONTH		MTD	TO DATE	TO DATE		YTD	ANNUAL	BALANCE
			ACTUAL	BUDGET	DIFF	BUDGET	ACTUAL	BUDGET	DIFF	BUDGET	BUDGET	REMAINING
ORDINARY MAINT & OPERATIONS												
941	4410	LABOR	12,262	13,346	(1,083)	92%	109,219	106,765	2,454	102%	160,147	50,928
945	4435	EMPLOYEE BENEFITS - MAINTENANCE	3,888	7,135	(3,247)	54%	42,906	57,079	(14,174)	75%	85,619	42,713
943	4420	MATERIALS	3,717	6,167	(2,449)	60%	39,019	49,333	(10,315)	79%	79,000	39,981
CONTRACT COSTS												
943		GARBAGE & TRASH	1,755	1,848	(93)	95%	9,575	14,780	(5,205)	65%	22,170	12,595
		COOLING / AIR CONDITIONING	4,590	917	3,673	501%	15,191	7,333	7,858	207%	11,000	(4,191)
		ELEVATOR MAINTENANCE	-	-	-	-	-	-	-	-	-	-
		LANDSCAPE & GROUNDS	2,935	2,128	808	138%	16,545	17,020	(475)	97%	25,530	8,985
		UNIT TURNAROUNDS	-	2,224	(2,224)	0%	-	17,793	(17,793)	0%	26,690	26,690
		ELECTRICAL	-	42	(42)	0%	-	333	(333)	0%	500	500
		PLUMBING	-	288	(288)	0%	2,427	2,300	127	106%	3,450	1,023
		EXTERMINATION	158	930	(772)	17%	6,334	7,440	(1,106)	85%	11,160	4,826
		JANITORIAL	-	626	(626)	0%	-	5,007	(5,007)	0%	7,510	7,510
		ROUTINE MAINTENANCE	-	11,192	(11,192)	0%	140,995	89,533	51,462	157%	134,300	(6,695)
943	4430	OTHER MISCELLANEOUS CONTRACT COSTS	-	292	(292)	0%	5,538	2,333	3,205	237%	3,500	(2,038)
TOTAL ORDINARY MAINT & OPER			29,305	47,131	(17,826)	62%	387,747	377,051	10,697	103%	570,576	182,829
PROTECTIVE SERVICES												
	4480	PROTECTIVE SERVICES CONTRACT COSTS	-	-	-	-	-	-	-	-	-	-
		PROTECTIVE SERVICES OTHER	-	-	-	-	-	-	-	-	-	-
TOTAL PROTECTIVE SERVICES			-	-	-	-	-	-	-	-	-	-
INSURANCE												
961	4510	PROPERTY	6,530	6,501	29	100%	43,951	52,007	(8,056)	85%	78,010	34,059
		GENERAL LIABILITY	1,355	497	857	272%	8,371	3,977	4,395	211%	5,965	(2,406)
		WORKER'S COMPENSATION	1,101	1,160	(58)	95%	8,811	9,277	(465)	95%	13,915	5,104
		AUTO INSURANCE	-	-	-	-	-	-	-	-	-	-
		OTHER INSURANCE	23	596	(573)	4%	1,982	4,769	(2,788)	42%	7,154	5,172
969		TOTAL INSURANCE EXPENSES	9,009	8,754	255	103%	63,115	70,029	(6,914)	90%	105,044	41,929
GENERAL EXPENSES												
962	4590	OTHER GENERAL EXPENSES	7,164	7,159	5	100%	17,712	57,273	(39,561)	31%	85,909	68,197
		COMPENSATED ABSENCES	-	-	-	-	-	-	-	-	-	-
		PAYMENTS IN LIEU OF TAXES	-	1,798	(1,798)	0%	-	14,387	(14,387)	0%	21,580	21,580
		BAD DEBTS	1,684	2,779	(1,095)	61%	23,839	22,233	1,606	107%	33,350	9,511
		INTEREST EXPENSE	20,307	16,852	3,455	121%	126,641	134,818	(8,177)	94%	202,227	75,586
TOTAL GENERAL EXPENSES			29,156	28,589	567	102%	168,192	228,711	(60,519)	74%	343,066	174,874
969		TOTAL OPERATING EXPENDITURES	152,532	141,459	11,073	108%	1,116,409	1,131,675	(15,266)	99%	1,702,513	586,104
970		CASH FLOW FROM OPERATIONS	(23,121)	14,826	(37,947)	-156%	65,921	118,610	(52,689)	56%	172,915	106,994
OTHER FINANCIAL ITEMS-SOURCES & (USES)												
		OPERATING TRANSFERS IN	-	(1,725)	1,725	0%	(22,705)	(13,803)	(8,902)	164%	(20,705)	2,000
		OPERATING TRANSFERS OUT	-	1,725	(1,725)	0%	22,705	13,803	(8,902)	164%	20,705	(2,000)
		DEBT SERVICE PAYMENT - INTEREST	-	-	-	-	-	-	-	-	-	-
		DEBT SERVICE PAYMENT - PRINCIPAL	-	-	-	-	-	-	-	-	-	-
971	4610	EXTRAORDINARY MAINTENANCE	-	417	(417)	0%	-	3,333	(3,333)	0%	5,000	5,000
		CAPITAL EXPENDITURES	42,854	42,854	-	100%	342,835	342,835	-	100%	514,252	171,417
973	4715	HOUSING ASSISTANCE PAYMENTS	-	-	-	-	-	-	-	-	-	-
		OTHER ITEMS	-	-	-	-	-	-	-	-	-	-
TOTAL OTHER EXPENSES			42,854	43,271	(417)	99%	342,835	346,168	(3,333)	99%	519,252	176,417
900		TOTAL EXPENDITURES	195,387	184,730	10,656	106%	1,459,244	1,477,843	(18,600)	99%	2,221,765	762,521
		DEPRECIATION ADD BACK	42,854	42,854	-	100%	342,835	342,835	-	100%	514,252	171,417
		NET CASH FLOW	(23,121)	14,410	(37,530)	-160%	65,921	115,277	(49,356)	57%	167,915	101,994

APHA CONSOLIDATED ACCOUNT DETAIL

LINE ACCT		CURRENT	CURRENT		% OF	YEAR	YEAR		% OF		BUDGET
ITEM #	DESCRIPTION	MONTH	MONTH		MTD	TO DATE	TO DATE		YTD	ANNUAL	BALANCE
		ACTUAL	BUDGET	DIFF	BUDGET	ACTUAL	BUDGET	DIFF	BUDGET	BUDGET	REMAINING
INCOME											
HUD PHA GRANTS											
3401.01	CAPITAL FUND REVENUE - SOFT COSTS	36,532	52,470	(15,938)	70%	464,603	419,762	44,841	111%	629,643	165,040
3401.1	CFP CAPITAL EXPENDITURES	-	1,411	(1,411)	0%	-	11,286	(11,286)	0%	16,929	16,929
3410	SECTION 8 HAP INCOME	32,166	27,417	4,749	117%	234,173	219,333	14,840	107%	329,000	94,827
3410.1	ADMINISTRATIVE FEES EARNED	-	-	-	-	-	-	-	-	-	-
3410.2	PORT IN ADMINISTRATIVE FEES EARNED	-	-	-	-	-	-	-	-	-	-
TOTAL HUD PHA GRANTS		68,698	81,298	(12,600)	85%	698,776	650,381	48,395	107%	975,572	276,796
EXPENSES											
ADMINISTRATIVE OFFICE EXPENSES											
4130	LEGAL	671	798	(127)	84%	30,081	6,387	23,694	471%	9,580	(20,501)
4140	STAFF TRAINING	395	792	(397)	50%	3,555	6,333	(2,778)	56%	9,500	5,945
4150	TRAVEL	1,311	702	609	187%	5,064	5,613	(549)	90%	8,420	3,356
4170	ACCOUNTING	1,600	2,872	(1,272)	56%	15,333	22,976	(7,644)	67%	34,464	19,132
4190	SUNDRY	1,234	2,879	(1,645)	43%	15,066	23,033	(7,967)	65%	34,550	19,484
4190.2	TELEPHONE/COMMUNICATIONS	2,628	1,486	1,141	177%	10,056	11,891	(1,836)	85%	17,837	7,781
4190.3	POSTAGE	1,361	357	1,004	381%	9,696	2,857	6,840	339%	4,285	(5,411)
4190	OFFICE SUPPLIES	-	83	(83)	0%	-	667	(667)	0%	1,000	1,000
4190	CONTRACT COST-COPIER/SECURITY	62	335	(273)	19%	1,675	2,680	(1,005)	63%	4,020	2,345
4190	EVICITION COST	-	167	(167)	0%	595	1,333	(738)	45%	2,000	1,405
4190.9	CONTRACT COST - ADMIN	7,354	1,059	6,295	694%	35,459	8,473	26,986	418%	12,710	(22,749)
TOTAL ADMINISTRATIVE		15,945	10,732	5,213	149%	96,499	85,857	10,642	112%	128,786	32,287
TOTAL GENERAL EXPENSES											
4590	OTHER GENENERAL EXPENSE	6,177	1,625	4,552	380%	14,131	13,000	1,131	109%	19,501	5,370
4590	FSS CONTRIBUTIONS	3,256	1,332	1,924	244%	12,305	10,658	1,647	115%	15,987	3,682
4590.5	ASSET MANAGEMENT FEE	2,807	1,332	1,475	211%	9,263	10,658	(1,395)	87%	15,987	6,724
4590.6	OTHER FEES	-	-	-	-	-	-	-	-	-	-
TOTAL OTHER GENERAL EXPENSES		12,239	4,290	7,950	285%	35,700	34,316	1,384	104%	51,475	15,775

AVON PARK HOUSING AUTHORITY

CASH Analysis

AVON PARK PUBLIC HOUSING

As Of Date: 9/30/2016

	Balance
General Fund	183,445.20
Section 8 PH Funds	0.00
Security Deposits	25,545.00
PNC Account	0.00
Petty Cash	100.00
Investment CD at Highlands Bank	43,244.04
Investment CD at PNC	0.00
Investment MM at Highlands Bank	0.00
Investment MM	1,096,795.04
Utility Deposit Escrow Fund	3,000.00
FSS Escrow	4,155.18
Development Corporation	31,674.07
Cornell Colony - General Fund	4,155.18
Lakeside Park 2 - RAD	100.00
Cornell Colony-Operating Deficit Reserves	0.00
Cornell Colony-Security Deposit	0.00

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AVON PARK HOUSING AUTHORITY

CASH Analysis

CORNELL COLONY

As Of Date: 9/30/2016

Balance	
General Fund	0.00
Section 8 PH Funds	0.00
Security Deposits	0.00
PNC Account	0.00
Petty Cash	0.00
Investment CD at Highlands Bank	0.00
Investment CD at PNC	0.00
Investment MM at Highlands Bank	0.00
Investment MM	0.00
Utility Deposit Escrow Fund	0.00
FSS Escrow	5,786.10
Development Corporation	0.00
Cornell Colony - General Fund	5,786.10
Lakeside Park 2 - RAD	0.00
Cornell Colony-Operating Deficit Reserves	100.00
Cornell Colony-Security Deposit	11,200.00

AVON PARK HOUSING AUTHORITY

CASH Analysis

NORTH CENTRAL HEIGHTS *I*

As Of Date: 9/30/2016

Balance

General Fund	30,192.79
Section 8 PH Funds	0.00
Security Deposits	13,500.00
PNC Account	0.00
Petty Cash	0.00
Investment CD at Highlands Bank	0.00
Investment CD at PNC	0.00
Investment MM at Highlands Bank	0.00
Investment MM	0.00
Utility Deposit Escrow Fund	0.00
FSS Escrow	0.00
Development Corporation	0.00
Cornell Colony - General Fund	0.00
Lakeside Park 2 - RAD	0.00
Cornell Colony-Operating Deficit Reserves	0.00
Cornell Colony-Security Deposit	0.00

AVON PARK HOUSING AUTHORITY

CASH Analysis

NORTH CENTRAL HEIGHTS II

As Of Date: 9/30/2016

	Balance
General Fund	2,693.63
Section 8 PH Funds	0.00
Security Deposits	9,950.00
PNC Account	0.00
Petty Cash	0.00
Investment CD at Highlands Bank	0.00
Investment CD at PNC	0.00
Investment MM at Highlands Bank	0.00
Investment MM	0.00
Utility Deposit Escrow Fund	0.00
FSS Escrow	0.00
Development Corporation	0.00
Cornell Colony - General Fund	0.00
Lakeside Park 2 - RAD	0.00
Cornell Colony-Operating Deficit Reserves	0.00
Cornell Colony-Security Deposit	0.00

AVON PARK HOUSING AUTHORITY

CASH Analysis

RIDGEDALE

As Of Date: 9/30/2016

Balance	
General Fund	39,587.32
Section 8 PH Funds	0.00
Security Deposits	6,206.00
PNC Account	0.00
Petty Cash	0.00
Investment CD at Highlands Bank	0.00
Investment CD at PNC	0.00
Investment MM at Highlands Bank	0.00
Investment MM	0.00
Utility Deposit Escrow Fund	0.00
FSS Escrow	0.00
Development Corporation	0.00
Cornell Colony - General Fund	0.00
Lakeside Park 2 - RAD	0.00
Cornell Colony-Operating Deficit Reserves	0.00
Cornell Colony-Security Deposit	0.00

AVON PARK HOUSING AUTHORITY
Budgeted Income Statement
AVON PARK PUBLIC HOUSING

Fiscal Year End Date:	12/31/2016	ACCOUNT	1 Month(s) Ended September 30, 2016	9 Month(s) Ended September 30, 2016	Budget	Variance
Operating Revenues and Expenses						
Operating Expenses						
Nontechnical Salaries	01 001 4110.00 5	14,250.66	137,628.02	126,408.69	(11,219.33)	
Legal Expense	01 001 4130.00 5	0.00	3,035.50	3,749.94	714.44	
Staff Training	01 001 4140.00 5	0.00	3,257.00	2,250.00	(1,007.00)	
Travel	01 001 4150.00 5	1,652.28	6,716.50	5,249.97	(1,466.53)	
Accounting Fees	01 001 4170.00 5	805.00	6,618.63	6,374.97	(243.66)	
Computer Support/Licensing Fees	01 001 4170.2 5	0.00	3,952.27	6,020.19	2,067.92	
Audit Fees	01 001 4171.00 5	0.00	9,450.00	10,499.94	1,049.94	
Employee Benefits Cont - Admin	01 001 4182.00 5	4,398.83	52,297.77	56,616.75	4,318.98	
Sundry	01 001 4190.00 5	2,931.53	8,910.02	10,125.00	1,214.98	
Advertising	01 001 4190.18 5	295.79	2,504.31	4,500.00	1,995.69	
Bank Fees	01 001 4190.19 5	0.00	182.90	0.00	(182.90)	
Telephone/Communications	01 001 4190.2 5	1,044.40	6,903.24	7,499.97	596.73	
Collection Loss Recovery Contract Fe	01 001 4190.21 5	0.00	86.40	0.00	(86.40)	
Postage	01 001 4190.3 5	528.00	2,759.75	1,874.97	(884.78)	
Eviction Costs	01 001 4190.4 5	0.00	595.00	749.97	154.97	
Contract Costs- Copier	01 001 4190.6 5	68.73	495.06	374.94	(120.12)	
Contract Costs-Admin Security	01 001 4190.7 5	0.00	360.00	374.94	14.94	
Pre-employment testing	01 001 4190.8 5	35.00	141.95	374.94	232.99	
Contract Costs-Admin	01 001 4190.9 5	0.00	16,870.85	2,999.97	(13,870.88)	
Ten Services - RAB	01 001 4220.00 5	0.00	38.52	397.44	358.92	
Water	01 001 4310.00 5	301.89	2,426.82	2,999.97	573.15	
Electricity	01 001 4320.00 5	926.35	20,522.79	25,499.97	4,977.18	
Natural Gas	01 001 4330.00 5	52.44	773.85	1,049.94	276.09	
Sewer	01 001 4390.00 5	562.76	4,682.70	4,725.00	42.30	
Labor	01 001 4410.00 5	5,248.00	52,720.48	52,191.00	(529.48)	
Maintenance Materials	01 001 4420.00 5	1,434.66	20,030.51	32,999.94	12,969.43	
Contract Costs	01 001 4430.00 5	425.00	425.00	33,750.00	33,325.00	
Pest Control	01 001 4430.1 5	470.00	4,230.00	4,500.00	270.00	
Contract Costs - Lawn	01 001 4430.3 5	1,300.00	10,400.00	10,499.94	99.94	
Contract Costs-Air Conditioning	01 001 4430.4 5	2,950.00	8,198.00	2,624.94	(5,573.06)	
Contract Costs-Plumbing	01 001 4430.5 5	0.00	1,312.50	1,499.94	187.44	
Contract Costs - Vacancy Turnaround	01 001 4430.6 5	0.00	0.00	5,249.97	5,249.97	
Garbage and Trash Collection	01 001 4431.00 5	680.00	4,900.24	4,500.00	(400.24)	
Emp Benefit Cont - Maintenance	01 001 4433.00 5	2,485.62	23,350.08	20,436.75	(2,913.33)	
Insurance - Property	01 001 4510.00 5	2,517.57	23,276.05	21,524.94	(1,751.11)	
Worker's Comp Insurance	01 001 4510.1 5	826.06	7,434.54	7,124.94	(309.60)	
Other Insurance-Crime, Auto, Direc&C	01 001 4510.2 5	22.94	2,004.54	2,093.22	88.68	
Liability Insurance	01 001 4510.3 5	577.54	4,782.42	3,224.97	(1,557.45)	
Payment in Lieu of Taxes	01 001 4520 5	0.00	0.00	7,934.94	7,934.94	
Collection Losses	01 001 4570.00 5	0.00	4,602.85	7,499.97	2,897.12	
FSS Monthly Contributions	01 001 4590.02 5	577.00	3,619.00	0.00	(3,619.00)	
Other General Expense	01 001 459000 5	85.00	6,876.29	1,499.94	(5,376.35)	
Extraordinary Maintenance	01 001 4610 5	0.00	0.00	3,749.94	3,749.94	
Total Operating Expenses		47,453.05	469,372.35	503,622.81	34,250.46	
Operating Revenues						
Dwelling Rent	01 001 3110.00 5	11,175.00	110,568.89	101,250.00	9,318.89	
Operating Subsidy	01 001 3401.00 5	36,610.00	328,603.00	359,593.47	(30,990.47)	
Total Operating Revenues		47,785.00	439,171.89	460,843.47	(21,671.58)	
Total Operating Revenues and Expenses		331.95	(30,200.46)	(42,779.34)	12,578.88	
Other Revenues and Expenses						
Other Revenues and Expenses						
RESTRICTED INTEREST	01 001 3431.00 5	0.00	28.57	7.47	21.10	
DO NOT USE-Investment Inc - Unrest	01 001 3610 5	(148.70)	0.00	0.00	0.00	
Investment Income - Unrestricted	01 001 3610.00 5	305.93	1,720.15	1,724.94	(4.79)	
Other Income - Tenant	01 001 3690.00 5	280.95	4,752.00	12,375.00	(7,623.00)	
Collection Loss Recovery Prior Year	01 001 3690.01 5	2.35	240.68	1,499.94	(1,259.26)	
Other Income - FSS Forfeitures	01 001 3690.08 5	0.00	475.08	0.00	475.08	
Other Income - Rent for Tulane Ave B	01 001 3690.13 5	950.00	7,800.00	8,624.97	(824.97)	

Report Criteria PHA: 01 Project: '001','002','003'

Include Unapproved: False Include Zero Balance: False Include Full Year Budget: False Show Variance Percentage: False

SUBMITTED BY PENNY PIERATT, COMPTROLLER

AVON PARK HOUSING AUTHORITY
Budgeted Income Statement
AVON PARK PUBLIC HOUSING

Fiscal Year End Date:	12/31/2016	ACCOUNT	1 Month(s) Ended September 30, 2016	9 Month(s) Ended September 30, 2016	Budget	Variance
			(16.26)	1,098.17	8,174.97	(7,076.80)
Other Income - Insurance	01 001 3690.14 5		0.00	0.00	2,999.97	(2,999.97)
Other Income - Retirement Forfeiture	01 001 3690.15 5		0.00	237.50	749.97	(512.47)
Leave with no Notice	01 001 3690.16 5		0.00	24.55	74.97	(50.42)
Other Income - Copies & Fax	01 001 3690.2 5		0.00	232.00	749.97	(517.97)
Other Income - Scrap Metal Salvage	01 001 3690.4 5		0.00	0.00	1,499.94	(1,499.94)
Other Income - Misc - Non Tenant	01 001 3690.6 5		0.00	1,350.13	1,125.00	225.13
Other Income-Laundry	01 001 3690.7 5		0.00	200.00	749.97	(549.97)
Other Income - Community Rm Rent	01 001 3690.8 5		0.00	22,705.00	15,528.69	7,176.31
Operating Transfer In	01 001 9110.00 5					
Total Other Revenues and Expenses			1,374.27	40,863.83	55,885.77	(15,021.94)
Total Other Revenues and Expenses			1,374.27	40,863.83	55,885.77	(15,021.94)
Total Net Income (Loss)			1,706.22	10,663.37	13,106.43	(2,443.06)

Report Criteria PHA: 01 Project: '001','002','003'
 Include Unapproved: False Include Zero Balance: False Include Full Year Budget: False Show Variance Percentage: False

SUBMITTED BY PENNY PIERATT, COMPTROLLER

AVON PARK HOUSING AUTHORITY
Budgeted Income Statement
AVON PARK PUBLIC HOUSING
OTHER BUSINESS ACTIVITIES

OTHER BUSINESS ACTIVITIES							
Fiscal Year End Date:	12/31/2016	ACCOUNT	1 Month(s) Ended September 30, 2016	9 Month(s) Ended September 30, 2016	Budget	Variance	
Operating Revenues and Expenses							
Operating Expenses							
Nontechnical Salaries	01 100 4110.00	5	0.00	9,751.20	0.00	(9,751.20)	
Admin Salaries - NCH I	01 100 4110.01	5	777.40	8,116.86	10,560.69	2,443.83	
Admin Salaries - NCH II	01 100 4110.02	5	623.56	6,438.68	7,124.94	686.26	
Admin Salaries - Ridgedale	01 100 4110.03	5	858.40	8,819.07	11,999.97	3,180.90	
Travel	01 100 4150.00	5	0.00	0.00	52.47	52.47	
Accounting Fees	01 100 4170.00	5	150.00	1,200.00	2,700.00	1,500.00	
Audit Fees	01 100 4171.00	5	0.00	0.00	374.94	374.94	
Employee Benefits Cont - Admin-Ridg	01 100 4182.00	5	212.66	3,205.57	4,500.00	1,294.43	
Employee Benefits Cont - Admin - NC	01 100 4182.1	5	153.15	1,871.92	3,375.00	1,503.08	
Employee Benefits Cont - Admin - NC	01 100 4182.2	5	144.61	1,631.81	3,917.25	2,285.44	
Sundry	01 100 4190.00	5	541.68	692.50	270.00	(422.50)	
Contract Costs/Admin	01 100 4190.90	5	0.00	0.00	270.00	270.00	
Insurance - Workers Comp	01 100 4510.40	5	154.20	1,387.80	1,046.25	(341.55)	
Other General Expense	01 100 4590	5	0.00	0.00	374.94	374.94	
Total Operating Expenses			3,615.66	43,115.41	46,566.45	3,451.04	
Total Operating Revenues and Expenses			(3,615.66)	(43,115.41)	(46,566.45)	3,451.04	
Other Revenues and Expenses							
Other Revenues and Expenses							
Revenue-Management Fees-Ridgedal	01 100 3690.00	5	328.95	24,020.06	27,000.00	(2,979.94)	
Revenue - Management Fees - NCH I	01 100 3690.1	5	861.32	7,888.12	9,000.00	(1,111.88)	
Revenue - Management Fees - NCH I	01 100 3690.2	5	1,023.42	10,105.33	12,477.69	(2,372.36)	
Other Income - Contribution-NCH	01 100 3690.50	5	0.00	23,258.63	22,500.00	758.63	
Total Other Revenues and Expenses			2,213.69	65,272.14	70,977.69	(5,705.55)	
Total Other Revenues and Expenses			2,213.69	65,272.14	70,977.69	(5,705.55)	
Total Net Income (Loss)			(1,401.97)	22,156.73	24,411.24	(2,254.51)	

AVON PARK HOUSING AUTHORITY
Budgeted Income Statement
CORNELL COLONY
CORNELL COLONY LLC

Fiscal Year End Date: 12/31/2016		ACCOUNT	1 Month(s) Ended September 30, 2016	9 Month(s) Ended September 30, 2016	Budget	Variance
Operating Revenues and Expenses						
Operating Expenses						
Nontechnical Salaries	03 001 4110.00 5		0.00	0.00	5,912.19	5,912.19
Legal Expense	03 001 4130.00 5		0.00	298.00	4,012.47	3,714.47
Staff Training	03 001 4140.00 5		0.00	0.00	374.94	374.94
Travel	03 001 4150.00 5		0.00	0.00	749.97	749.97
Accounting Fees	03 001 4170.00 5		282.00	1,782.00	4,227.75	2,445.75
Audit Fees	03 001 4171.00 5		0.00	0.00	2,999.97	2,999.97
Employee Benefits Cont - Admin	03 001 4182.00 5		0.00	0.00	8,687.25	8,687.25
Sundry	03 001 4190.00 5		214.60	3,289.67	1,125.00	(2,164.67)
Non Capitalized Admin	03 001 4190.01 5		0.00	4,328.38	0.00	(4,328.38)
Advertising and Marketing	03 001 4190.08 5		0.00	1,431.40	0.00	(1,431.40)
Bank Fees	03 001 4190.19 5		0.00	15.00	0.00	(15.00)
Telephone/Communications	03 001 4190.20 5		0.00	0.00	749.97	749.97
Postage	03 001 4190.30 5		0.00	47.00	374.94	327.94
Eviction Costs	03 001 4190.40 5		0.00	0.00	374.94	374.94
Water	03 001 4310.00 5		16.40	56.91	4,950.00	4,893.09
Electricity	03 001 4320.00 5		563.25	4,417.91	0.00	(4,417.91)
Sewer	03 001 4390.00 5		31.20	74.46	4,950.00	4,875.54
Labor	03 001 4410.00 5		0.00	0.00	10,155.69	10,155.69
Materials	03 001 4420.00 5		150.93	4,993.23	3,749.94	(1,243.29)
Contract Costs - Pest Control	03 001 4430.10 5		158.00	316.00	749.97	433.97
Contract Costs-Lawn	03 001 4430.30 5		1,164.58	1,814.58	749.97	(1,064.61)
Contract Costs - AC	03 001 4430.40 5		0.00	0.00	1,125.00	1,125.00
Contract Costs - Plumbing	03 001 4430.50 5		0.00	0.00	374.94	374.94
Contract Costs - Vacancy Turnaround	03 001 4430.60 5		0.00	0.00	374.94	374.94
Garbage and Trash Collection	03 001 4431.00 5		606.18	971.60	4,500.00	3,528.40
Emp Benefit Cont - Maintenance	03 001 4433.00 5		0.00	0.00	17,804.25	17,804.25
Property Insurance	03 001 4510.00 5		1,586.58	4,759.74	0.00	(4,759.74)
Insurance - General Liability	03 001 4510.30 5		299.90	1,643.46	11,682.72	10,039.26
Management Fees	03 001 4590.01 5		0.00	0.00	8,885.25	8,885.25
Total Operating Expenses			5,073.62	30,239.34	99,642.06	69,402.72
Operating Revenues						
Dwelling Rent	03 001 3110.00 5		8,970.28	17,180.05	143,005.50	(125,825.45)
Total Operating Revenues			8,970.28	17,180.05	143,005.50	(125,825.45)
Total Operating Revenues and Expenses			3,896.66	(13,059.29)	43,363.44	(56,422.73)
Other Revenues and Expenses						
Other Revenues and Expenses						
Other Income - Misc Other Revenue	03 001 3690.00 5		0.00	83.48	0.00	83.48
Contract Costs	03 001 4430.00 5		0.00	0.00	(3,749.94)	3,749.94
Other General Expense	03 001 4590.02 5		0.00	(538.75)	0.00	(538.75)
Interest on Loan - Heartland National	03 001 5610.00 5		(4,742.42)	(36,423.58)	(34,557.75)	(1,865.83)
Total Other Revenues and Expenses			(4,742.42)	(36,878.85)	(38,307.69)	1,428.84
Total Other Revenues and Expenses			(4,742.42)	(36,878.85)	(38,307.69)	1,428.84
Total Net Income (Loss)			(845.76)	(49,938.14)	5,055.75	(54,993.89)

AVON PARK HOUSING AUTHORITY
Budgeted Income Statement
NORTH CENTRAL HEIGHTS
N CENTRAL HEIGHTS MGMT

Fiscal Year End Date:		ACCOUNT	1 Month(s) Ended September 30, 2016	9 Month(s) Ended September 30, 2016	Budget	Variance
12/31/2016						
Operating Revenues and Expenses						
Operating Expenses						
Nontechnical Salaries	02 001 4110.00	5	1,072.76	9,720.76	5,172.75	(4,548.01)
Legal Expense	02 001 4130.00	5	0.00	0.00	2,250.00	2,250.00
Staff Training	02 001 4140.00	5	0.00	0.00	112.50	112.50
Travel	02 001 4150.00	5	0.00	0.00	112.50	112.50
Accounting Fees	02 001 4170.00	5	328.00	3,438.62	2,624.94	(813.68)
COMPUTER SUPPORT/LICENSING	02 001 4170.2	5	0.00	1,079.00	1,218.69	139.69
Audit Fees	02 001 4171.00	5	0.00	3,390.00	3,749.94	359.94
Employee Benefits Cont - Admin	02 001 4182.00	5	650.78	5,548.41	2,428.47	(3,119.94)
Sundry	02 001 4190.00	5	71.76	1,325.55	3,749.94	2,424.39
Advertising and Marketing	02 001 4190.08	5	93.12	1,021.72	1,049.94	28.22
Bank Fees	02 001 4190.18	5	0.00	10.00	0.00	(10.00)
Telephone	02 001 4190.2	5	85.96	1,255.92	749.97	(505.95)
Collection Loss Recovery Contract Fe	02 001 4190.21	5	0.00	320.70	0.00	(320.70)
Postage	02 001 4190.3	5	0.00	17.00	33.75	16.75
Contract Costs - Admin	02 001 4190.9	5	0.00	7,678.49	2,137.50	(5,540.99)
Ten Services - After School Program	02 001 4220.2	5	210.90	1,180.90	900.00	(280.90)
Water	02 001 4310.00	5	164.31	749.66	1,057.50	307.84
Electricity	02 001 4320.00	5	579.75	4,525.18	4,874.94	349.76
Sewer	02 001 4390.00	5	58.96	579.30	772.47	193.17
Labor	02 001 4410.00	5	1,113.60	10,311.94	11,074.50	762.56
Maintenance Materials	02 001 4420.00	5	1,080.43	8,478.45	7,499.97	(978.48)
Contract Costs	02 001 4430.00	5	1,025.00	1,025.00	1,874.97	849.97
Contract Costs-Pest Control	02 001 4430.1	5	100.80	907.20	884.97	(22.23)
Contract Costs-Plumbing	02 001 4430.2	5	0.00	130.40	149.94	19.54
Contract Costs - AC	02 001 4430.4	5	700.00	5,149.00	1,874.97	(3,274.03)
Contract Costs - Lawn	02 001 4430.5	5	400.00	2,595.00	2,624.94	29.94
Contract Costs - Vacancy Turnaround	02 001 4430.6	5	0.00	0.00	3,749.94	3,749.94
Contract Costs - Camera	02 001 4430.7	5	0.00	0.00	532.44	532.44
Garbage and Trash Collection	02 001 4431.00	5	54.00	397.50	1,125.00	727.50
Emp Benefit Cont - Maintenance	02 001 4433.00	5	790.94	6,698.59	7,154.19	455.60
Insurance - Property	02 001 4510.00	5	944.03	8,709.75	9,000.00	290.25
Insurance - Workers Comp	02 001 4510.1	5	77.10	693.90	524.97	(168.93)
Insurance - Liability	02 001 4510.3	5	175.77	1,216.85	2,339.19	1,122.34
Payment in Lieu of Taxes	02 001 4520	5	0.00	0.00	3,749.94	3,749.94
Bad Debts - Other	02 001 4570.00	5	0.00	3,524.48	7,499.97	3,975.49
Bonneville Interest	02 001 4580.01	5	3,845.97	38,542.70	38,737.44	194.74
Other General Expense	02 001 4590.00	5	861.32	1,769.42	3,749.94	1,980.52
Management Fees	02 001 4590.02	5	0.00	6,174.70	7,364.97	1,190.27
Total Operating Expenses			14,485.26	138,166.09	144,508.05	6,341.96
Operating Revenues						
Dwelling Rent	02 001 3110.00	5	16,955.12	156,109.81	145,192.50	10,917.31
Total Operating Revenues			16,955.12	156,109.81	145,192.50	10,917.31
Total Operating Revenues and Expenses			2,469.86	17,943.72	684.45	17,259.27
Other Revenues and Expenses						
Other Revenues and Expenses						
Interest - Restricted	02 001 3431.00	5	0.00	46.53	18.72	27.81
Other Income - Tenant	02 001 3690.00	5	237.00	5,069.43	2,107.44	2,961.99
Collection Loss Recovery Prior Year	02 001 3690.01	5	0.00	1,019.00	0.00	1,019.00
Total Other Revenues and Expenses			237.00	6,134.96	2,126.16	4,008.80
Total Other Revenues and Expenses			237.00	6,134.96	2,126.16	4,008.80
Total Net Income (Loss)			2,706.86	24,078.68	2,810.61	21,268.07

Report Criteria PHA: 02 Project: '001'
 Include Unapproved: False Include Zero Balance: False Include Full Year Budget: False Show Variance Percentage: False

SUBMITTED BY PENNY PIERATT, COMPTROLLER

AVON PARK HOUSING AUTHORITY
Budgeted Income Statement
NORTH CENTRAL HEIGHTS
NORTH CENTRAL HEIGHTS II

Fiscal Year End Date:	12/31/2016	ACCOUNT	1 Month(s) Ended September 30, 2016	9 Month(s) Ended September 30, 2016	Budget	Variance
Operating Revenues and Expenses						
Operating Expenses						
Nontechnical Salaries	02 002 4110.00	5	883.44	7,950.96	4,064.22	(3,886.74)
Legal Expense	02 002 4130.00	5	0.00	22,698.01	749.97	(21,948.04)
Legal Expense-Development	02 002 4130.1	5	0.00	4,347.63	0.00	(4,347.63)
Staff Training	02 002 4140.00	5	0.00	0.00	374.94	374.94
Travel	02 002 4150.00	5	0.00	0.00	374.94	374.94
Accounting Fees	02 002 4170.00	5	321.00	3,431.62	2,624.94	(806.68)
COMPUTER SUPPORT/LICENSING	02 002 4170.2	5	0.00	889.00	450.00	(439.00)
Audit Fees	02 002 4171.00	5	0.00	4,315.00	2,999.97	(1,315.03)
Employee Benefits Cont - Admin	02 002 4182.00	5	535.93	4,565.02	1,908.00	(2,657.02)
Sundry	02 002 4190.00	5	61.25	1,046.52	2,250.00	1,203.48
Advertising and Marketing	02 002 4190.08	5	76.69	885.54	749.97	(135.57)
Bank Service Fee	02 002 4190.18	5	0.00	78.57	0.00	(78.57)
Telephone	02 002 4190.2	5	0.00	328.15	0.00	(328.15)
Postage	02 002 4190.3	5	0.00	14.00	29.97	15.97
Contract Costs - Admin	02 002 4190.9	5	0.00	5,148.10	2,250.00	(2,898.10)
Ten Services - After School Program	02 002 4220.20	5	210.90	1,180.90	900.00	(280.90)
Water	02 002 4310.00	5	42.92	396.52	524.97	128.45
Electricity	02 002 4320.00	5	79.64	1,012.31	1,575.00	562.69
Sewer	02 002 4330.00	5	9.33	93.68	172.44	78.76
Labor	02 002 4410.00	5	1,113.60	10,311.93	11,074.50	762.57
Maintenance Materials	02 002 4420.00	5	550.18	5,689.30	7,499.97	1,810.67
Contract Costs	02 002 4430.00	5	800.00	800.00	1,350.00	550.00
Contract Costs-Pest Control	02 002 4430.1	5	79.20	712.80	734.94	22.14
Contract Costs - Lawn	02 002 4430.3	5	250.00	1,875.00	1,897.47	22.47
Contract Costs - AC	02 002 4430.4	5	735.00	2,164.00	1,874.97	(289.03)
Contract Costs - Plumbing	02 002 4430.5	5	0.00	983.75	187.47	(796.28)
Contract Costs - Vacancy Turnaround	02 002 4430.6	5	0.00	0.00	5,009.94	5,009.94
Garbage and Trash Collection	02 002 4431.00	5	7.00	113.00	427.50	314.50
Emp Benefit Cont - Maintenance	02 002 4433.00	5	790.92	6,698.42	7,154.19	455.77
Insurance - Property	02 002 4510.00	5	731.77	6,784.17	8,075.97	1,291.80
Insurance - Workers Comp	02 002 4510.1	5	22.03	198.27	524.97	326.70
Insurance - Liability	02 002 4510.3	5	138.11	968.91	749.97	(218.94)
Payment in Lieu of Taxes	02 002 4520	5	0.00	0.00	3,749.94	3,749.94
Bad Debts - Other	02 002 4570.00	5	122.52	2,897.16	2,512.44	(384.72)
Bonneville Interest	02 002 4580.01	5	3,479.13	34,866.33	35,039.97	173.64
Other General Expense	02 002 4590.00	5	(146.58)	2,217.36	3,749.94	1,532.58
Management Fees	02 002 4590.02	5	0.00	7,932.77	10,019.97	2,087.20
Total Operating Expenses			10,893.98	143,594.70	123,633.45	(19,961.25)
Operating Revenues						
Dwelling Rent	02 002 3110.00	5	13,927.67	127,871.66	119,999.97	7,871.69
Total Operating Revenues			13,927.67	127,871.66	119,999.97	7,871.69
Total Operating Revenues and Expenses			3,033.69	(15,723.04)	(3,633.48)	(12,089.56)
Other Revenues and Expenses						
Other Revenues and Expenses						
INTEREST - RESTRICTED	02 002 3431.00	5	0.00	37.23	14.94	22.29
DO NOT USE-Investment Inc - Unrest	02 002 3610	5	(0.65)	0.00	0.00	0.00
Investment Income - Unrestricted	02 002 3610.00	5	1.15	19.45	29.97	(10.52)
Other Income - Tenant	02 002 3690.00	5	790.36	5,103.15	5,249.97	(146.82)
Other Income - Non Tenant	02 002 3690.3	5	0.00	0.00	374.94	(374.94)
Total Other Revenues and Expenses			790.86	5,159.83	5,669.82	(509.99)
Total Other Revenues and Expenses			790.86	5,159.83	5,669.82	(509.99)
Total Net Income (Loss)			3,824.55	(10,563.21)	2,036.34	(12,599.55)

Report Criteria PHA: 02 Project: '002'
 Include Unapproved: False Include Zero Balance: False Include Full Year Budget: False Show Variance Percentage: False

SUBMITTED BY PENNY PIERATT, COMPTROLLER

AVON PARK HOUSING AUTHORITY
Budgeted Income Statement
RIDGEDALE
RIDGEDALE APARTMENTS LLC

Fiscal Year End Date:	12/31/2016	ACCOUNT	1 Month(s) Ended September 30, 2016	9 Month(s) Ended September 30, 2016	Budget	Variance
Operating Revenues and Expenses						
Operating Expenses						
Nontechnical Salaries	07 002 4110.00	5	946.56	8,560.24	4,803.75	(3,756.49)
Legal Expense	07 002 4130.00	5	0.00	0.00	434.97	434.97
Staff Training	07 002 4140.00	5	0.00	0.00	374.94	374.94
Travel	07 002 4150.00	5	5.94	5.94	149.94	144.00
Accounting Fees	07 002 4170.00	5	276.00	2,523.63	2,709.00	185.37
COMPUTER SUPPORT/LICENSING	07 002 4170.2	5	0.00	952.50	749.97	(202.53)
Audit Fees	07 002 4171.00	5	0.00	2,820.00	3,524.94	704.94
Employee Benefits Cont - Admin	07 002 4182.00	5	574.19	4,894.18	2,255.22	(2,638.96)
Sundry	07 002 4190.00	5	50.00	680.16	1,949.94	1,269.78
Postage	07 002 4190.03	5	0.00	15.00	524.97	509.97
Advertising	07 002 4190.08	5	82.16	680.89	1,499.94	819.05
Coll Agent Fees	07 002 4190.15	5	0.00	114.97	149.94	34.97
Bank Fees	07 002 4190.18	5	10.51	83.38	149.94	66.56
Telephone	07 002 4190.21	5	105.91	1,304.77	900.00	(404.77)
Collection Loss Recovery Contract Fe	07 002 4190.21	5	0.00	0.00	90.00	90.00
Eviction Costs	07 002 4190.4	5	0.00	0.00	749.97	749.97
Contract Costs - Admin	07 002 4190.9	5	0.00	4,761.90	1,499.94	(3,261.96)
Tenant Services	07 002 4220.00	5	1,592.09	1,592.09	0.00	(1,592.09)
Water	07 002 4310.00	5	604.69	5,145.54	7,687.44	2,541.90
Electricity	07 002 4320.00	5	342.47	2,707.02	3,825.00	1,117.98
Sewer	07 002 4390.00	5	1,048.30	8,501.18	9,450.00	948.82
Labor	07 002 4410.00	5	4,852.96	48,202.51	35,614.44	(12,588.07)
Maintenance Materials	07 002 4420.00	5	406.65	3,450.17	7,499.97	4,049.80
Contract Costs	07 002 4430.00	5	925.00	6,463.00	2,624.94	(3,838.06)
Pest Control	07 002 4430.1	5	122.00	1,098.00	1,499.94	401.94
Contract Costs-Lawn	07 002 4430.3	5	425.00	3,400.00	3,375.00	(25.00)
Contract Costs-Air Conditioning	07 002 4430.4	5	245.00	4,310.00	1,125.00	(3,185.00)
Contract Costs-Plumbing	07 002 4430.5	5	0.00	0.00	374.94	374.94
Contract Costs - Vacancy Turnaround	07 002 4430.6	5	0.00	0.00	5,632.47	5,632.47
Contract Costs-Camera Security	07 002 4430.7	5	0.00	0.00	5,099.94	5,099.94
Garbage and Trash Collection	07 002 4431.00	5	642.10	5,181.62	6,075.00	893.38
Emp Benefit Cont - Maintenance	07 002 4433.00	5	1,411.84	11,637.82	11,664.72	26.90
Insurance - Property	07 002 4510.00	5	750.18	6,951.22	9,371.97	2,420.75
Insurance - Workers Comp	07 002 4510.1	5	22.03	198.27	749.97	551.70
Insurance - Liability	07 002 4510.3	5	163.22	1,114.34	749.97	(364.37)
Payment in Lieu of Taxes	07 002 4520.00	5	0.00	0.00	749.97	749.97
Bad Debts - Other	07 002 4570.00	5	0.00	12,936.99	7,499.97	(5,437.02)
Interest on Notes Payable-Centennial	07 002 4580.03	5	3,170.04	32,046.05	43,335.00	11,288.95
Management Fees	07 002 4590.00	5	328.95	24,020.06	22,207.50	(1,812.56)
Other General Expense	07 002 4590.01	5	0.00	4,067.80	5,249.97	1,182.17
Total Operating Expenses			19,103.79	210,421.24	213,980.49	3,559.25
Operating Revenues						
Dwelling Rent	07 002 3110.00	5	2,154.60	29,395.74	35,624.97	(6,229.23)
HAP Subsidy	07 002 3110.01	5	0.00	234,173.00	246,749.94	(12,576.94)
Total Operating Revenues			2,154.60	263,568.74	282,374.91	(18,806.17)
Total Operating Revenues and Expenses			(16,949.19)	53,147.50	68,394.42	(15,246.92)
Other Revenues and Expenses						
Other Revenues and Expenses						
Investment Income-Unrestricted	07 002 3430	5	0.00	0.00	74.97	(74.97)
Interest - Restricted	07 002 3431.00	5	42.02	333.35	37.44	295.91
DO NOT USE-Interest Earned	07 002 3610	5	(3.35)	0.00	0.00	0.00
Investment Income - Unrestricted	07 002 3610.00	5	5.50	34.01	0.00	34.01
Other Income - Tenant	07 002 3690.00	5	629.60	4,808.30	5,999.94	(1,191.64)
Collection Loss Recovery Prior Year	07 002 3690.01	5	0.00	127.87	0.00	127.87
Leave with no Notice	07 002 3690.16	5	0.00	0.00	4,574.97	(4,574.97)
Other Income - Scrap Metal Salvage	07 002 3690.4	5	120.00	120.00	0.00	0.00
Other Income/Laundry	07 002 3690.7	5	0.00	787.00	0.00	787.00

Report Criteria PHA: 07 Project: '002'
 Include Unapproved: False Include Zero Balance: False Include Full Year Budget: False Show Variance Percentage: False

SUBMITTED BY PENNY PIERATT, COMPTROLLER

AVON PARK HOUSING AUTHORITY
Budgeted Income Statement
 RIDGEDALE
 RIDGEDALE APARTMENTS LLC

Fiscal Year End Date:	12/31/2016	ACCOUNT	1 Month(s) Ended September 30, 2016	9 Month(s) Ended September 30, 2016	Budget	Variance
			<u>793.77</u>	<u>6,210.53</u>	<u>10,687.32</u>	<u>(4,476.79)</u>
Total Other Revenues and Expenses			793.77	6,210.53	10,687.32	(4,476.79)
Total Other Revenues and Expenses			(16,155.42)	59,358.03	79,081.74	(19,723.71)
Total Net Income (Loss)						

Report Criteria PHA: 07 Project: '002'
 Include Unapproved: False Include Zero Balance: False Include Full Year Budget: False Show Variance Percentage: False

SUBMITTED BY PENNY PIERATT, COMPTROLLER

The Housing Authority of Avon Park

RESOLUTION NO. 16-07

APPROVING REVISIONS TO THE APHA PERSONNEL POLICY

Whereas, The CEO and Senior Management staff completed an in depth review of the Authority's Personnel Policy and determined that several changes were necessary to bring the policy in line with current titles and practices, as well as, to implement new necessary policies.

NOW THEREFORE BE IT RESOLVED, that the revised APHA personnel policy is hereby approved.

ADOPTED THIS 18th DAY OF OCTOBER, 2016.

Accepted_____

Attest_____

SEAL

THE AVON PARK HOUSING AUTHORITY

EMPLOYEE HANDBOOK & PERSONNEL POLICY

Adopted _____

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WELCOME LETTER

Welcome, new staff member!

On behalf of the Board of Commissioners and your colleagues, I want to welcome you to AVON PARK HOUSING AUTHORITY and wish you every success here!

We believe that every staff member contributes directly to this organization's growth and success, and we hope you take pride in being a member of our team.

This handbook was developed to describe some of the expectations AVON PARK HOUSING AUTHORITY has for staff, and to outline the policies, programs and benefits available to eligible staff members. As a new staff member, you should familiarize yourself with the contents of this handbook as soon as possible. It will answer many questions you have about employment at AVON PARK HOUSING AUTHORITY.

You will be asked to sign the acknowledgment page once you are satisfied that you understand the rules and policies. If there is something you do not understand, or if you have questions about anything, please talk to your immediate supervisor. The acknowledgement form should be signed and returned to your supervisor no later than 10 days after the receipt of this handbook.

I know your experience here will be challenging, enjoyable and rewarding. Again, welcome to AVON PARK HOUSING AUTHORITY!

Sincerely,

Tracey Rudy
Chief Executive Officer

INTRODUCTION AND PURPOSE

The Avon Park Housing Authority is an organization dedicated to providing decent, safe, sanitary, drug free, and affordable housing for low-income individuals and families; as well as providing opportunities that promote self-sufficiency and economic independence for residents. Each employee has an essential role in the overall accomplishment of the Authority's mission.

This team effort can be carried out within the framework of a sound personnel management system. The Housing Authority strives to employ capable well-qualified and industrious employees who are sufficiently mature to accept the responsibilities of their positions, and who will perform their duties in a courteous and efficient manner to ensure that services will be competently provided and resident's and clients needs will be met. In exchange the Housing Authority endeavors to establish suitable working conditions based upon equitable and reasonable standards.

This manual establishes the basic personnel policies of the Avon Park Housing Authority. The Authority's Personnel Policy goals are:

1. To provide employees with a professional environment in which they can advance their personal career goals while also meeting the goals of the Authority.
2. To ensure that all employees are aware of their obligations to the Authority, the regulations governing their employment and their rights while employed by the Authority.

This personnel policy is not a contract, express or implied, guaranteeing employment for any specific duration. The employee of the Authority may terminate the employment relationship at any time, for any reason, with or without cause or notice. These policies supersede any other authority policies whether oral, written, by custom or practice.

No individual representative of the Housing Authority has the authority to enter into an agreement for employment for any specified period or to make any promises or commitments contrary to the policies or information contained herein.

Good employee/employer relationships grow from mutual understanding, trust and respect. To encourage such relationships, the expectations and obligations of both parties should be clear at the beginning of the relationship. To facilitate this, a copy of this manual will be available to all employees. Additional copies of this manual are available through the Comptroller or the CEO.

The purposes of the personnel policies in this handbook are:

1. to establish a uniform procedure for staff members of APHA regarding employee and employer practices and working conditions.
2. to establish policies as a guide to be followed by the CEO and Board of Commissioners to determine employment practices and on-going administration of the Avon Park Housing Authority staff members, subject to the reservation of rights concerning changes in the personnel policies contained in the disclaimer and acknowledgement of disclaimer.
3. to acquaint potential staff members and current staff members with the personnel policies of the Avon Park Housing Authority.
4. to clarify that the development, on-going review and amendment of the personnel policies is a responsibility of the CEO.
5. to promote high standards of employment and provide compensation for staff members that is consistent with comparable organizations.

It is intended that the personnel policies will conform to all current local, state and federal employment regulations.

It is also the purpose of this handbook to provide a general guide for the personnel administration of the Avon Park Housing Authority, but in no shape, manner or form does it constitute a legal contract binding upon the Authority. These policies are in accordance with the Authority By-Laws, applicable State statutes, City of Avon Park Ordinances and Federal laws and regulations.

Each employee is individually responsible for following all Personnel policy provisions and procedures.

The Authority reserves the right to amend, alter, modify or rescind any portion of the "Policies and Procedures" as may appear reasonable or necessary to the Board of Commissioner and within the guidelines and regulations as established by the U.S. Department of Housing and Urban Development, and as circumstances, budget limitation, required economics, or other valid reasons may dictate or demand. Amendment of any provisions of this Personnel Policy shall be upon Resolution of the Board of Commissioners.

A master copy of the Personnel Policy will be kept in the CEO's office with any updates or amendments. In the event of a discrepancy between any copies, the master copy will be considered the correct copy.

HOUSING AUTHORITY MISSION

The Housing Authority of Avon Park exists primarily to provide safe, decent and sanitary housing for families who cannot afford suitable housing accommodations in the private market. In addition to our primary purpose of improving the living conditions of low and moderate income persons, it is also our endeavor to help improve their economic and social standing by all means available. As a Housing Authority, we must always seek to provide dignity, privacy and personal safety for our residents. It is important that all employees of the Authority realize that an interest in the well-being of our residents must be exhibited at all times.

BOARD OF COMMISSIONERS: Organization and Authority

THE AVON PARK HOUSING AUTHORITY is governed by a BOARD OF COMMISSIONERS made up of community volunteers with a broad range of skills and expertise. Board members are appointed by the Mayor and City Council. The Board exercises full authority and oversight responsibility for the organization. The Board also exercises its authority through the CEO who implements policies within the organization. The Board of Commissioners delegates the responsibility of developing and presenting personnel policies and pay plans to the Board for consideration. Upon adoption the CEO is responsible for implementing and monitoring all policies approved. The Board, working with the CEO, has sole authority to change, interpret or modify policies in this handbook.

All positions shall be established in accordance with an organization plan clearly setting forth areas of responsibility and authority. The organization plan places primary responsibility for the operation of the Authority on the CEO. The CEO shall prepare an organizational chart showing lines of authority and decision making responsibility. The authority to employ, promote, transfer, demote, and terminate personnel shall be vested in the CEO and other individuals formally designated in writing to act for him/her.

All employees shall be informed of their level of authority and responsibilities at the time they assume their duties and shall be given the necessary authority to perform assigned tasks. Employees shall be given clear, concise job descriptions when employment begins. Job descriptions shall be reviewed and updated as needed. This shall be done in consultation with the employee in each position. Substantive changes to the organizational charts or job descriptions shall be approved by the Board of Commissioner.

Board members discuss management and personnel issues only with the CEO. Staff members who have management or personnel issues should follow the chain of command by bringing their concerns to their immediate supervisor.

CODE OF ETHICS

The Authority's reputation and its actions as a legal entity depend on the conduct of its employees. Each employee must commit to act according to the highest ethical standards and to know and abide by applicable laws, regulations and policies. Each employee must assure that his/her personal conduct is above reproach and complies with the highest standards of conduct and business ethics. Difficult as it may be at times, employees also have an obligation to assure that the conduct of those who work around them complies with these Standards. The Authority's Code of Ethics will be enforced at all levels fairly and without prejudice.

Non-Discrimination

Employees shall respect all individuals without regard to race, color, sex, sexual orientation, familial status, religion, creed, ethnic or national identity, age, disability or political affiliation.

Privacy and Confidentiality

Employees shall safeguard privacy rights and confidential information. Nor shall employees use or divulge confidential information gathered in the performance of their duties as a means of making private profit, gain or benefit.

Honest, Truthfulness and Integrity

Employees shall conduct their employment activities with the highest principles of honesty, integrity, truthfulness and honor. To this end, employees are to avoid not only impropriety, but also the appearance of impropriety. Integrity also demands that the Housing Authority equipment (e.g. office equipment, telephones, computers, autos, etc.) and financial resources (e.g. vendor accounts and credit cards) not be used by employees except for authorized business purposes.

Lawfulness and Adherence to Policies

- a) Employees shall follow both the letter and the spirit of laws, regulations and policies governing the Authority.
- b) Employees have a legal, moral and ethical responsibility to report to the Housing Authority known or suspected violations of law, regulations, or policy.
- c) Employees shall not make, recommend, or cause to be taken any action known or believed to be in violation of any law, regulation or policy.
- d) Employees shall not make, recommend, or cause to be made any expenditure of funds known or believed to be in violation of any law, regulation or policy.

Use of Position for Personal Benefit or Gain

- a) Employees shall not use their position, as an employee of the Housing Authority, to force, induce, coerce, harass, intimidate or in any manner influence any person, including subordinates, fellow employees or clients to provide any benefit, whether financial or otherwise, to themselves or others.
- b) Employees representing the Authority to third parties shall not allow themselves to be placed in a position in which an actual or apparent conflict of interest exists. Such conflict of interest may arise, or appear to arise, by reason of the employee's acceptance of gratuities, favors or other valuable benefits which could improperly influence or reasonably be interpreted as improperly influencing sound business decisions. This restriction shall not be interpreted as prohibiting the acceptance of such things as business meals, baked goods, candy, seasonal foods, or similar items given in the spirit of goodwill. All such activities shall be conducted strictly on an arm's length, business basis.

Conflict of Interest

- a) Employees will exercise great care in situations in which a preexisting personal relationship exists between an employee, an industry representative or official of an agency with which the Authority has an existing or potential business relations. In such a situation, the employee shall immediately report the relationship to management and, pending further direction by the Authority, the employee shall take no further action associated with the business in which the personal relationship exists. Where there is any doubt as to the propriety of the relationship, the employee shall report the

relationship to management so as to avoid even the appearance of impropriety.

- b) Employees shall not engage in outside business activities, either directly or indirectly, with a client, customer, vendor, supplier or agent of the Authority, or engage in business activities which are inconsistent with, or contrary to, the business activities of the Authority.

It at any time the employee is in doubt he/she should seek guidance from the CEO.

EMPLOYMENT POLICIES 1.1

Our employee's accomplishments and cooperation are most important to our continued growth and success. It is our objective to provide a relationship of mutual trust and respect which will allow employees to attain personal satisfaction from their work and contribute to AVON PARK HOUSING AUTHORITY's growth. Accordingly, it is our policy to endeavor at all times to...

1. select and hire...

-the best qualified men and women without regard to race, creed, color, age, sex, sexual orientation, national identity, religion, familial status, disability or political affiliation. All positions shall be filled on the basis of qualifications, competency, and related work experience.

2. provide wages, salaries, and employee benefits...

-that are competitive with those provided for similar positions in the local area and with the industry competition and in accordance with available budgets. To annually review area wages, salaries, and benefits to ensure our programs are competitive.

3. promote from within...

-by providing opportunities for qualified employees to fill open positions whenever possible. In the case of current employees seeking to be promoted or transferred, past performance and such other factors as punctuality, work initiative, efficiency, and seniority shall be taken into consideration.

4. provide job security...

-by improving productivity, and managing changing business conditions to minimize layoffs or adverse effects on our employees, while maintaining the short and long-range growth and stability of the organization.

5. provide safe working conditions...

-by maintaining an orderly operation and developing and adhering to policies and practices that ensure the safety and health of employees.

6. encourage an individual's self-development...

-by providing educational programs, training, and other opportunities for skill development and advancement.

7. recognize length of service...

-as an important factor in cases of promotion, layoff and recall, other qualifications being equal.

8. put in writing...

-in the employee handbook, our policies and practices in detail.

9. keep employees informed...

-by providing a full program of communication of developments within the organization which are of interest to employees.

10. encourage open discussion...

-of all ideas, suggestions, problems, and matters of concern among employees and supervisors. Differences of opinion, complaints, and problems will occur, but a fair hearing will be given to all viewpoints to develop a positive solution.

Hiring shall be based upon the merits of applicants. Where appropriate written and/or oral examinations may be given. If all other factors are equal, preference will be given to residents of Highlands County and of the Avon Park Housing Authority.

Relatives are defined as the staff member's spouse, son, daughter, father, mother, brother, sister, grandparents, grandchildren, in-laws or step-relatives of the same degree.

THE AVON PARK HOUSING AUTHORITY discourages the employment of relatives within the same program site. At no time, will any staff member be allowed to supervise another staff member who is related under the definition above.

In the event that two staff members within the same program site become related, those staff members are required to bring this to the attention of the CEO. If the CEO determines that the staff members are not in a supervisor/subordinate relationship, they may be permitted to continue their employment as long as it is in the best interests of APHA. If the staff members are determined to be in a supervisor/subordinate relationship, one must transfer to another program site, for which he or she is qualified, if one is available. If no such position is available or does not become available within 90 days, one staff member must resign. If the staff members can't decide who will resign within the designated timeframe, the CEO will make the decision.

JOB OPENINGS 1.2

The Avon Park Housing Authority will post all open positions internally and with the Workforce Development Center for a minimum of five days and the position will remain open until filled. The Housing Authority may also advertise in the classified sections of local newspapers and state and national housing organizations as appropriate.

Resumes, written applications, work samples, personal interviews, or letters of recommendation may be required of job applicants. Requirements will be listed in job opening postings.

The Board of Commissioners has sole authority to hire the CEO.

LETTER OF HIRE 1.3

When the job selection process for an open position is complete, the CEO will send the final candidate two copies of a Letter of Hire. The letter shall state the position title, starting date, beginning pay or salary, and an offer of employment.

The candidate is asked to sign and return one copy of the letter, indicating that the candidate accepts or declines the position. The candidate will keep one copy of the letter for personal files.

ACCURACY OF JOB APPLICATION 1.4

During initial screening of job candidates, APHA relies on the accuracy of information contained in the application form, as well as the accuracy of other information presented during the interview and hiring process. Misrepresentation, falsification, or material omissions in any of this information may result in APHA's exclusion of the individual from further consideration for employment, or, if the person has been hired, disciplinary action, up to and including termination.

Sample Authorization of Release forms are included in the Appendix.

REINSTATEMENT/REHIRE 1.5

Depending on the circumstances, the AVON PARK HOUSING AUTHORITY may consider a former employee for reemployment. Such applications are subject to the Housing Authority's usual pre-employment procedures. To be considered, an applicant must have been in good standing at the time of previous separation from the Housing Authority.

- In the event an individual returns to work at AVON PARK HOUSING AUTHORITY, regardless of the length of employment and length of time since the separation from the Housing Authority, employee medical, dental, life insurance, and eligibility for using benefit time shall occur as if the individual was a new/first-time employee with the Housing Authority..
- Former employees who were eligible for the retirement plan upon separation will be a participant immediately upon rehire.
- Former employees rehired within one year into the same position will be reinstated at the current budgeted rate of pay for that position.
- Former employees rehired for a lesser paying position will be reviewed on an individual basis for salary changes.
- If a former employee is rehired within one year from the termination date, all previous service time shall be counted in determining length of employment.
- If a former employee is rehired more than a year from termination date, service time may begin as though the employee were a new/first-time employee.

TERMS OF EMPLOYMENT 1.6

Employment with AVON PARK HOUSING AUTHORITY is entered into voluntarily, and staff members are free to resign at will at any time. Similarly, the Housing Authority may terminate the employment relationship with or without cause at any time, so long as there is no violation of applicable state or federal law. The employment relationship is "at will" and it does not constitute an employment contract.

Policies set forth in this handbook are not intended to create a contract, nor are they to be construed to constitute contractual obligations of any kind, or a contract of employment between the Housing Authority and any of its staff members. The provisions of this handbook have been developed at the discretion of the Board and management, and may be amended or cancelled at any time at AVON PARK HOUSING AUTHORITY's sole discretion.

EQUAL OPPORTUNITY EMPLOYMENT 1.7

The Avon Park Housing Authority does not discriminate in employment opportunities or practices on the basis of race, color, religion, sex, national origin, age, disability, marital status, sexual orientation, political affiliation, or any other category protected by law.

The Housing Authority will make reasonable accommodation for qualified individuals with known disabilities unless doing so creates an undue hardship for the organization. This policy governs all aspects of employment, including selection, job assignment, compensation, discipline, termination and access to benefits and training.

Staff who have questions or concerns about any type of discrimination in the workplace are encouraged to bring these issues to their immediate supervisor. Staff members may raise concerns and make reports or complaints without fear of reprisal. Anyone found to be engaging in any type of unlawful discrimination or retaliation against staff members who raise concerns or report incidents of discrimination will be subject to disciplinary action, up to, and including termination.

ADA 1.8

THE AVON PARK HOUSING AUTHORITY complies with the Americans with Disabilities Act (ADA), and does not discriminate in hiring or employment on the basis of disability.

The Housing Authority complies with the ADA by:

- using the same criteria for the employment of persons with disabilities as it does for employment of persons without disabilities.
- using the same criteria for promotion for staff members with or without disabilities.
- making reasonable accommodations, on a case-by-case basis, which will permit disabled persons to work and advance in careers.
- educating staff that it is unacceptable to discriminate against individuals with disabilities.
- taking steps to make its buildings and other facilities barrier-free and accessible according to state and federal law.
- prominently posting notices explaining the provisions of the ADA and staff members' rights under the law.

Further, any contracts or business arrangements that discriminate against the disabled are prohibited.

PROCEDURE FOR DISCRIMINATION COMPLAINTS 1.9

The agency fully endorses the establishment of a workforce environment which is free from discrimination and/or harassment. If an employee feels that he/she is a victim of discrimination or harassment, he/she should complete a complaint form and speak with one of the following AVON PARK HOUSING AUTHORITY administrative staff members:

- Comptroller
- CEO

One or more of the identified administrators will conduct an investigation into the complaint and all information will be maintained in a confidential manner to the extent possible. Once the investigation is complete, the Comptroller will inform the employee of the results of the investigation within fifteen (15) working days. The letter will include findings of the investigation and the remedy of the complaint. If the employee

remains unsatisfied with the findings or remedy, he/she can file a complaint with the state Division of Civil Rights.

HARASSMENT 1.10

It is illegal to harass others on the basis of their race, age over 40, color, national origin, religion, marital status, citizenship, disability and other personal characteristics. Harassment includes, but is not limited to, making derogatory remarks about such characteristics, making "jokes" about ethnic or other groups, and other verbal, physical and visually offensive behavior.

The harassment of another employee will lead to disciplinary action, up to and including immediate termination in cases of gross misconduct.

Any employee who feels harassed should speak first with his or her supervisor, or if the supervisor is not appropriate, to the CEO in an attempt to reach a resolution. It is the supervisor's duty to listen to such complaints and to refer them to the appropriate authority. Any reports of harassment must be immediately reported by supervisors to the CEO on an as-needed basis. Should be circumstance arise where the CEO is not appropriate for consultation, any concerns should be reported to the Chairman of the Board of Commissioners in accordance with the Board of Commissioner Grievance Committee Structure and Policy, found in the Appendix.

SEXUAL HARASSMENT 1.11

Harassment on the basis of sex is a violation of Title VII of the Civil Rights Act of 1964 and the Florida Human Rights Act. The Avon Park Housing Authority does not tolerate any form of sexual harassment in the workplace. All employees must be allowed to work in an environment free from sexual overtones and intimidation. Therefore, the following behaviors are grounds for disciplinary action, up to and including termination:

- unwelcome sexual advances
- requests for sexual acts or favors
- insulting or degrading sexual remarks or conduct directed against another staff member
- threats, demands or suggestions that a staff member's work is contingent upon toleration of, or acquiescence to sexual advances
- any other unwelcome statements or actions based on sex, that are severe or pervasive enough to unreasonably interfere with an individual's work performance, or creating an intimidating, hostile or offensive work environment

Staff members who have complaints of sexual harassment should use the Avon Park Housing Authority chain of command, and bring complaints as quickly as possible in person or in writing on the Sexual Harassment Complaint form, to an immediate supervisor. Staff members who believe the immediate supervisor is the cause of the sexual harassment may bring the completed form directly to the CEO. Staff members who believe the CEO is the cause of the sexual harassment may bring the completed form directly to the Board of Commissioner's Chairperson. Information is to be shared only with those needing to know.

The Housing Authority prohibits retaliation against anyone for bringing a sexual harassment complaint or participating in an investigation of such a complaint. Retaliation against staff members for bringing a complaint of sexual harassment or participating in an investigation of such a complaint is grounds for disciplinary action, up to and including termination.

The Housing Authority will make every effort possible to conduct a full, prompt, impartial and confidential investigation. Where appropriate, a report of the investigation with recommendations concerning remedial action where necessary will be forwarded to the CEO. The CEO will review the report and determine the corrective action to be taken, and notify all parties in the complaint of the decision.

IMMIGRATION LAW 1.12

THE AVON PARK HOUSING AUTHORITY is committed to employing only citizens of the United States or aliens authorized to work in the United States. To comply with U.S. immigration laws, the Housing Authority requires all new staff members, as a condition of employment, to complete the Employment Verification Form I-9 and present documentation establishing identity and employment eligibility.

Former staff members of the Housing Authority who are rehired must complete the form if there is no completed I-9 form on file, or if no I-9 form has been completed within the past three years and a copy in their file, or if the previous I-9 form is no longer valid.

HANDBOOK RECEIPT CONFIRMATION 1.13

All new employees will be required to sign the form below, acknowledging that they have received a copy of the complete personnel policy handbook, read the handbook, and have been given an opportunity to ask for clarification of policies they do not understand.

ACKNOWLEDGEMENT OF RECEIPT OF PERSONNEL POLICY HANDBOOK

I have received a copy of the Avon Park Housing Authority handbook and have read it carefully. I understand all its rules, policies, terms and conditions, and I agree to abide by them.

I understand and agree that my employment is terminable at-will so that both the Avon Park Housing Authority and I remain free to end our work relationship. I further understand and agree that nothing in this handbook in any way creates any expressed or implied contract of employment between the Avon Park Housing Authority and myself.

Staff member signature

Date

(This form must be signed and returned to your supervisor within 10 days of receipt of the handbook.)

YOUR SUPERVISOR 2.1

You and your supervisor are two essential parts of a close working team, each having a certain responsibility to the other. You may expect your supervisor to see that you do your job safely, correctly, and thoroughly. Your supervisor, in turn, expects you to be busy at your assigned work and perform your job to the best of your ability. You have a right to expect your supervisor to provide you with proper tools, equipment, and safeguards, and to teach you how to use them. You, of course, are expected to use them as intended.

One of your supervisor's most important jobs is helping you work effectively and advance to the best of your ability. Your supervisor's job will be easier and you will learn the full details of your job with greater ease if you remember these points:

- ask questions
- find out--don't guess
- learn "why" as well as "how"

The truth is success in your job means as much to your supervisor as it does to you. No one at the Avon Park Housing Authority is more interested in you than your supervisor. If you have questions or problems, please discuss them first with your supervisor.

PERSONAL RELATIONS OF EMPLOYEES 2.2

You are expected to make a sincere effort to get along with all other employees, and to contribute your fair share toward establishing and maintaining harmony and accord within this organization. Also, to exhibit a cooperative spirit toward others, a responsible attitude toward your job, and to exercise the amount of self-discipline and restraint that is necessary for effective cooperation.

ATTENDANCE 2.3

The agency expects all employees to conduct themselves in a professional manner during their employment. This includes practicing good attendance habits. All employees should regard coming to work on time, working their shift as scheduled, and leaving at the scheduled time as essential functions of their jobs, i.e. good attendance habits form an integral part of every employee's job description.

Among other things, "good attendance habits" means the following:

- appearing for work no sooner than 5 minutes prior to the start of the shift and no later than the start of the shift.
- being at the work station ready for work by the start of the shift.
- remaining at the work station unless the needs of the job require being elsewhere, except during authorized breaks (including restroom breaks)
- taking only the time normally allowed for breaks
- remaining at work during your entire shift, unless excused by a supervisor
- not leaving work until the scheduled end of the shift, unless excused by a supervisor
- leaving promptly at the end of the shift unless given permission from the supervisor to work past that point.
- calling in and personally notifying the supervisor or another member of management if the employee is going to be either absent or tardy, unless a verifiable emergency makes it impossible to do so.

If an employee expects to be absent from work for any reason they must notify the supervisor as much in advance as possible.

Absence without approved leave is cause for disciplinary action. If an employee is absent for three (3) consecutive workdays without authorization, the employee may be considered to have abandoned his or her position and their employment may be terminated.

A completed Leave of Absence form is to be submitted to the employee's supervisor, Comptroller or CEO for approval, prior to the scheduled absence, or as soon as possible upon return from an unscheduled absence.

TIME KEEPING 2.4

Full-time and part-time exempt staff members must complete weekly time sheets to ensure that the administrative office can keep track of certain benefits like vacation, sick days, or other leave time. ~~All employees shall be paid biweekly on Wednesday.~~ Time sheets must be signed by the employee and turned into the employee's immediate supervisor on Friday morning of the ending pay period. The Supervisor will review, initial and turn in the completed forms to the payroll department by 9 am Friday. Failure to complete time sheets reflecting actual days and times worked will result in disciplinary action.

PUBLIC RELATIONS 2.5

All media releases and public speaking engagements before all groups, including various news media, concerning the Avon Park Housing Authority and its services, must be approved in advance by the CEO.

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COMMUNITY STATUS 2.6

The general public tends to equate the character of an organization with the character of the employees of the organization. It is expected therefore, that you will manage your personal affairs in a manner that will not cause embarrassment to the Housing Authority. You are expected to maintain a good reputation with your creditors and to respect and abide by the laws of the community. Participation in public, church, and civic affairs is highly commendable, and encouraged.

SPEAKING TO THE MEDIA 2.7

Staff members at the Avon Park Housing Authority are not authorized to speak to the news media about Housing Authority issues without first being cleared by the CEO. All inquiries from the media should be directed to the CEO.

Should representatives of the news media ask a staff member a question about the organization, that staff member should say, "I have no authority to speak to the media on behalf of the Avon Park Housing Authority, but I will refer you to the CEO."

TAPING CONVERSATIONS 2.8

It is fundamentally inconsistent with our employer/employee relationship for any employee to tape record any conversation with other employees, supervisors, or grievance hearings without the written permission of all parties.

"Taping" and "recording" under this policy includes the taping or recording of any conversation or communication, regardless of whether the conversation or communication takes place in person, over the phone, or via any other communication device or equipment, and regardless of the method used to tape or record (for example, tape recorder, video recorder, mechanical recording, wiretapping equipment, or other electronic equipment), and regardless of where the conversation or communication takes place (i.e., whether on or off the agency's premises).

PROPERTY ACCOUNTABILITY 2.9

Employees are urged to be as careful with tools and other Authority property assigned to their care as they are with their own belongings. When Authority tools or other equipment are furnished to employees for use in their jobs, supervisors will see that they are properly instructed in their use and care. Supervisors will further explain that, under Authority policy, employees to whom equipment is assigned will have full responsibility for it, financial and otherwise.

If such equipment is destroyed or damaged through neglect, misuse, carelessness or failure to follow instructions, the employee will pay for the damage or destruction.

Staff members are responsible for all items issued to them by the Avon Park Housing Authority, including, but not limited to, the following:

- credit cards
- cell phones

- computer equipment
- keys
- tools
- vehicles
- ID badges
- manuals
- uniforms
- printed materials

Staff members must return all Housing Authority property immediately on request and on termination of employment. The Housing Authority may withhold from the staff member's paycheck or final paycheck, the cost of any items that are not returned when required. The Housing Authority may also take all action deemed appropriate to recover or protect its property.

WORK AREA APPEARANCE 2.10

All staff members of the Avon Park Housing Authority are responsible for keeping their work areas neat in appearance. Food is not permitted in any area where there is contact with clients. Drinks should be kept in an appropriate sealed container and out of view of the public or clients. No drinks or food is to be kept on computer work spaces. Failure to maintain a reasonable standard may lead to disciplinary action.

EXPENDITURE OF FUNDS 2.11

Authority to incur and expend agency funds is vested solely in the CEO, in compliance with the current annual budget, which has been adopted by the BOARD OF COMMISSIONERS.

All purchase requisitions must be submitted to the CEO. It is at the discretion of the CEO to defer requests that are not immediately needed or that the budget will not withstand at that time.

Staff members may not purchase items and request reimbursement for such expenditures or charge items without prior approval from the CEO.

All purchases will be made with a purchase order duly signed and authorized by the CEO.

TOBACCO USE 2.12

The Avon Park Housing Authority provides a smoke-free, tobacco-free environment. Smoking, or the use of any tobacco products (including, but not limited to, pipes, cigars, snuff, or chewing tobacco), will not be permitted on the Housing Authority premises to include any agency vehicle.

Employees may smoke outside in designated areas during breaks. When smoking or otherwise using tobacco products outside, do not leave cigarette butts or other traces or litter on the ground or anywhere else. Being permitted to use tobacco products during breaks is a privilege. If that privilege is abused, it may be withdrawn altogether.

- Visitors are not permitted to use tobacco products anywhere on the Housing Authority premises, except where designated.
- Staff members are not permitted to use tobacco products anywhere on the Housing Authority premises (except in designated areas) or in Housing Authority vehicles or in a vehicle leased or rented by the Authority.

Violations of the policy brought to the attention of management will be discussed with the staff member. Failure to comply with the policy will result in disciplinary action.

CESSATION OF TOBACCO USE 2.13

It is the Avon Park Housing Authority's position that the use of tobacco products poses a serious health risk, and therefore it encourages the cessation of the use of such products.

"Freedom from Smoking" programs may be offered periodically by area agencies. Staff members who smoke are encouraged to attend "Freedom from Smoking" programs. The full cost of this program will be reimbursed to the staff member upon completion of the program.

SPECIAL GIFTS, DONATIONS OR GRATUITIES 2.14

All Avon Park Housing Authority staff members are required to report any gifts or donations made to them for the Housing Authority, for their specific program, or for their own personal use. No employee of the Housing Authority is permitted to accept personal gratuities in excess of incidental gifts (\$~~10-25~~ or less).

If a person expresses the desire to make a donation, the person should be directed by the staff member to contact the CEO for further information.

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Failure to report any of the above situations will result in further disciplinary action.

SOLICITATION/DISTRIBUTION ON PREMISE 2.15

Solicitation by staff on Avon Park Housing Authority property during working hours is prohibited. Working time is the time staff members are expected to be performing their job duties and does not include break periods, meal times or other periods when staff members are not engaged in performing their work.

Distribution of literature by staff on Housing Authority property in non-working areas during working time, as defined above, is prohibited.

Distribution of literature by staff other than agency notices to residents on Avon Park Housing Authority property in working areas is prohibited.

Any employee engaged in solicitation or distribution of literature outside of working hours must not wear any clothing or badges identifying them as an employee, and the employee must explain that they are not representing the agency.

Trespassing, soliciting or distributing any literature by anyone outside the employment of the Avon Park Housing Authority on Housing Authority premises is prohibited.

POLITICAL ACTIVITIES - HATCH ACT COMPLIANCE 2.16

The Avon Park Housing Authority recognizes that staff members have a right to take an active interest in and participate in political affairs. Staff members engaging in political activity are not allowed to give the impression that their political activity, or the position they hold, in any way represents the official views of the Housing Authority. All political activity by staff members will be understood to be the actions of individuals only, on their own time, and away from Housing Authority premises.

The **HATCH ACT** applies to local employees who are principally employed in connection with programs financed in whole or in part by loans or grants made by the United States or a federal agency.

An employee's conduct is also subject to the laws of the state and the regulations of the employing agency. Additionally, employees should be aware that the prohibitions of the Hatch Act are not affected by state or local laws.

In accordance with the provision or purposes of the Hatch Act (5 U.S.C. 7323, inter alia), an employee shall not

- be a candidate for public office in a partisan election
- use official authority or influence to interfere with or affect the results of an election or nomination
- directly or indirectly coerce contributions from subordinates in support of a political party or candidate.

Permitted Activities:

- run for public office in nonpartisan elections
- campaign for and hold office in political clubs and organizations
- actively campaign for candidates for public office in partisan and nonpartisan elections outside the premises of the agency.
- contribute money to political organizations and attend political fundraising functions.

Notwithstanding the above, all employees shall be free to vote as they may choose and to express their opinion on any and all political subjects and candidates.

SAFETY 2.17

The CEO is authorized to adopt such rules and procedures as are necessary to fully implement and enforce the Avon Park Housing Authority Safety Policy.

Safety is every employee's responsibility. You will be trained and equipped to perform your work safely. It is expected that you stay mentally alert and exercise every possible safety precaution at all times in order to reduce the possibility of accidental injury to person or property.

If an accident occurs, your supervisor must be notified immediately. The required accident reports must be completed as soon as possible after receiving medical attention. Even accidents resulting in minor injury should be reported. If no record is made of the accident, insurance will not cover treatment if the injury becomes aggravated.

The Avon Park Housing Authority Safety Manual is the official safety manual of the organization. Each employee will receive a copy of the Employee Safety Manual, which will remain theirs as long as they are employed with the organization. This manual provides ground rules for the safe accomplishment of day to day tasks and will be adhered to and enforced by the CEO and supervisory personnel. The failure of an employee to observe the Avon Park Housing Authority safety rules, regulations, policies, and procedures will result in either a reprimand, suspension without pay, or dismissal.

REPORTING ACCIDENTS 2.18

Any accident or injury involving anyone on the physical premises of the Avon Park Housing Authority, in an Avon Park Housing Authority vehicle, or in any volunteer or staff member owned vehicle used to conduct agency business, shall be reported immediately to the administrative office and followed up with a completed injury report.

VEHICLE USE POLICY 2.19

To use any agency vehicle an employee must be covered by the Avon Park Housing Authority insurance and possess a valid drivers license. Employees driving Housing Authority vehicles are required to follow the rules of this policy:

1. Seatbelts must be used at all times.
2. No smoking or alcoholic beverages will be allowed in any Housing Authority vehicle.
3. No driver may consume alcohol or illegal drugs while driving a Housing Authority vehicle, while on agency business, while in an agency vehicle, or prior to the employee's shift if such consumption would result in a detectable amount of alcohol or illegal drugs being present in the employee's system while on duty. In addition, no driver may consume or use any substance, regardless of legality or prescription status, if by so doing the driver's ability to safely operate a motor vehicle and carry out other work-related duties would be impaired or diminished.
4. Eating and drinking are allowed in Housing Authority vehicles if it doesn't interfere with the driver, and the vehicle is left clean afterwards.
5. The vehicles must be secure and doors locked at all times when a Housing Authority vehicle is parked or not in use.
6. Employees must obey all traffic laws and speed limits while driving a Housing Authority vehicle.
7. No driver of a Housing Authority vehicle may pick up or transport non-employees unless the passenger is a Housing Authority Commissioner, city employee, or other persons engaged in or advising on matters relating to Housing Authority services or participating in official business or programs, or if there is a work-related need to do so. If employees have the use of a Housing Authority vehicle for traveling to a training meeting and desire to have a family member accompany them they must use their private vehicle and travel mileage will not be paid. Any exceptions must have specific written prior approval from the CEO.
8. Employees whose job responsibilities include regular or occasional driving and who are issued a cell phone/radio for business use are expected to refrain from using their phone/radio while driving. Safety must come before all other concerns. Regardless of the circumstances, including slow or stopped traffic, employees are strongly encouraged to pull off to the side of the road and safely stop the vehicle before placing and/or accepting a call. If acceptance of a call is unavoidable and pulling over is not an option, employees are expected to keep the call short, refrain from having complicated or emotional discussion and keep eyes on the road. Special care should be taken in situations where there is traffic, bad weather or the employee is driving in an unfamiliar area. Employees charged with traffic violations resulting from the use of their phone/radio while

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driving will be solely responsible for all liabilities that result from such actions. Violations of this policy will be subject to the highest form of discipline, including termination.

Under no circumstance will a person who is not listed on the Housing Authority list of insured employees drive a Housing Authority vehicle.

Housing Authority vehicles, when not in use after business hours, will be locked and parked in the agency parking lot, maintenance facility, or other location as directed. No vehicle will be kept at an employee's home unless for scheduled emergency on-call service and authorized by the Maintenance Foreman as approved by the CEO. This will be reviewed on an annual basis with the budget, and at any time when the HUD subsidy or other reasons requires a cut-back in budgeted expenses. Employees authorized to take home Housing Authority-owned vehicles shall be responsible for taking steps to prevent vandalism or theft of the vehicle and its contents. Those steps shall include locking the vehicle, taking the keys from the ignition and where possible, parking the vehicle in a well-lighted area.

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When a Housing Authority-furnished vehicle is used by an employee the use is strictly limited to official purposes, which include transportation between places where the employee's presence is required incident to official business or other approved uses.

The Housing Authority shall review fuel consumption and mileage summaries provided by the fuel vendor for any changes in fuel consumption to insure practice with fuel conservation and take necessary corrective measures as needed. A mileage log will be maintained by the ~~Bookkeeper~~ Comptroller to monitor the use of Housing Authority vehicles.

If an employee loses their license for any reason and their primary responsibilities require them to use a vehicle, the employee will be placed on administrative leave without pay after 30 days without a license. If the period of time without a license will be for an extended period of time, the employee is subject to termination. If it is possible the agency will make every effort to transfer the employee to another position to avoid suspension or termination.

The Housing Authority annually checks with the FDLE on each employee's driving record, places a copy in the employee's file, and submits a copy of the record to the company insuring the Housing Authority vehicles.

TAKE HOME VEHICLE:

If a vehicle is assigned for an employee to take home the vehicle is for on-call purposes only. ~~The vehicle will be used for travel from and to work without personal stops of any kind. Even if the employee passes a store or any other places he/she wishes to stop, the~~

employee must go home and get a personal vehicle to go back to the store. At no time is a Housing Authority truck or car to be used to haul personal items such as furniture. The person assigned the vehicle must be on-call every time the vehicle is taken home. Any truck owned by the Housing Authority shall be identified with Avon Park Housing Authority lettering in a conspicuous place on the vehicle and be outfitted with lockable maintenance tool boxes.

If an employee violates the Take-Home Vehicle Policy they will be subjected to discipline up to and including termination.

Any violation of the Vehicle Use Policy will be administered in accordance with personnel policy using progressive discipline. The following actions, however, will result in immediate termination:

- Driving a Housing Authority vehicle or a privately-owned vehicle on official business under the influence of any illegal substance.
- Being arrested for reckless endangerment, manslaughter, hit-and-run, or other similar serious misuse of a vehicle.

SAFE OPERATION OF VEHICLES 2.20

At all times staff members must observe safe driving practices and obey speed limits and other traffic laws. Before driving an Avon Park Housing Authority vehicle or a private vehicle on Housing Authority business, all staff members must:

- include a copy of a current valid driver's license in their personnel file.
- certify that they were involved in no more than two moving violations in the past three years.
- show proof of insurance if personal vehicles are used for Housing Authority business.
- update changes in driver's license status to the CEO within five days of the change.
- report any moving violations to the CEO within five days of the violation.

Staff committing a moving violation in a Housing Authority or personal vehicle on Housing Authority business must report the violation immediately following the incident to the immediate supervisor. Such violation may be subject to disciplinary action, up to and including termination.

VEHICLE ACCIDENTS 2.21

In the event of an accident involving an Avon Park Housing Authority vehicle, the staff member or driver will be responsible to pay for the agency's Auto Insurance Deductible premium, if the accident resulted from that driver's neglect or error. If the staff member/driver is responsible for the accident and it results in repairs exceeding the insurance premium deductible amount or insurance coverage limit, or is a second offense for the staff member, the CEO will determine what action, if any, will be taken. The decision of the CEO will be final.

If the accident is not the fault of the staff member/driver, the staff member will not be held responsible for paying any repair costs related to the accident.

In the event of an accident, the staff member/driver should:

- not leave the scene of the accident or block traffic, and take steps to minimize the danger to others.
- notify police.
- cooperate with police.
- under no circumstance, admit guilt for the accident to anyone else.
- obtain the names and addresses of witnesses.
- notify Housing Authority management as soon as possible.
- complete an accident report within 24 hours and return it to the CEO.

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WORKPLACE VIOLENCE, WEAPONS 2.22

The Avon Park Housing Authority expressly prohibits any acts or threats of violence by any employee or former employee against any other employee on the property of the Housing Authority or elsewhere.

The Authority is committed to:

1. Providing a safe and healthful work environment;
2. Taking prompt remedial action up to and including termination of employment of any employee who engages in any threatening behavior or acts of violence or who uses obscene, abusive, or threatening language or gestures.

The Housing Authority prohibits any person from possessing weapons, including firearms, knives (excluding utility/work instruments), clubs or weapons of any other sort, on Housing Authority property at any time.

Staff members found to be in possession of a weapon on Housing Authority property, ~~including the parking lots~~, may be subject to disciplinary action, up to and including termination and legal action.

Employees have a duty to warn their supervisors of any suspicious workplace activity or situations or incidents that they observe or that they are aware of that involve persons engaged in any activities prohibited by this section. Reports will be kept confidential and retaliation against the reporter will not be tolerated.

CELLULAR AND DESK TELEPHONE USE 2.23

The Avon Park Housing Authority's cellular and desk telephones are for Housing Authority business. Where job or business needs demand immediate access to an employee the Housing Authority may issue a business cell phone to an employee for work related communications. In order to protect the employee from incurring a tax liability for the personal use of this equipment such phones are for business use only. Cellular phones include any type of portable phone equipment provided by the Housing Authority for employees work use including radio communications and services such as Nextel. The phones are the property of the Housing Authority. Personal use of an assigned cellular phone shall be occasional or for emergencies. Employees are required to reimburse the Housing Authority for any personal long distance calls made using any Housing Authority equipment, excluding appointments for medical services that must be made during working hours.

Desk phones are to be used for business purposes only. It may be necessary, occasionally, for staff to make telephone calls of a personal nature. These calls should be restricted to necessary calls and should be of limited time. Employees are expected to exercise reasonable discretion in using any Housing Authority phones for personal use. Excessive incoming or outgoing personal calls during the workday can interfere with employee productivity and be distracting to others. This practice also prevents clients and the public from reaching the Housing Authority with a reasonable expectation of response. Employees should make personal calls during non-work times and ensure that friends and family members are aware of the Housing Authority's policy. Housing Authority issued desk phones are not private or secure. The Housing Authority has the right to monitor telephone bills and usage to determine if misuse or abuse exists. Desk or any other phones may not be used to defame, harass, intimidate or threaten any other person.

While at work employees are expected to exercise the same discretion in using personal cellular phones as the use of Housing Authority phones. Employees should make personal calls during non-work times and ensure that friends and family members are aware of this policy. Personal cellular phones should be placed on silent or vibrate mode so as to not disturb business operations. The Housing Authority will not be liable for the loss, theft or damage of personal cellular phones brought to the workplace.

SAFETY ISSUES FOR CELLULAR PHONE USE

Employees whose job responsibilities include regular or occasional driving and who are issued a cell phone/radio to business are to refrain from using their phone/radio while driving. Safety must come first before all other concerns.

Violations of these policies may lead to suspension or loss of service or privileges and may lead to more serious sanctions including disciplinary action or termination.

INTERNET, E-MAIL, AND COMPUTER USE 2.24

The use of the Avon Park Housing Authority automation systems, including computers, fax machines, and all forms of Internet/Intranet access, is for company business and for authorized purposes only. Brief and occasional personal use of the electronic mail system of the Internet is acceptable as long as it is not excessive or inappropriate, occurs during personal time (lunch or other breaks), and does not result in expense to the agency.

Use is defined as “excessive” if it interferes with normal job functions, responsiveness, or the ability to perform daily job activities. Electronic communication should not be used to solicit or sell products or services that are unrelated to the agency’s business, distract; intimidate, or harass coworkers or third parties; or disrupt the workplace.

This section defines the boundaries for the “acceptable use” of the Avon Park Housing Authority’s electronic resources, including software, hardware devices, and network systems. Hardware devices, software programs, and network systems purchase and provided by the agency are to be used only for creating, researching, and processing agency-related materials. By using the Housing Authority’s hardware, software and network systems the employee assumes personal responsibility for their appropriate use and agrees to comply with this policy and other applicable company policies, as well as city, state and federal laws and regulations.

Unauthorized duplication of software is a violation of the Avon Park Housing Authority’s Software/Hardware Policy. Only the CEO can authorize the installation of any programs or software onto an agency computer. No outside equipment may be plugged into the Avon Park Housing Authority’s network without the CEO or Designee’s permission.

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Use of agency computers, networks and internet access is a privilege granted by management and may be revoked at any time for inappropriate conduct carried out on such systems, including, but not limited to:

- Sending chain letters or participating in any way in the creation or transmission of unsolicited commercial email (“spam”) that is unrelated to legitimate agency purposes.
- Engaging in private or personal business activities, including excessive use of instant messaging and chat rooms.
- Misrepresenting oneself or the agency.

- Violating the laws and regulations of the United States or any other nation or any state, city, or other local jurisdiction in any way.
- Engaging in unlawful or malicious activities.
- Deliberately propagating any virus, worm, Trojan horse, trap-door program code, or other code or file designed to disrupt, disable, impair, or otherwise harm either the agency's networks or systems or those of any other individual or entity;
- Using abusive, profane, threatening, racist, sexist, or otherwise objectionable language in either public or private messages.
- Sending, receiving, or accessing pornographic materials.
- Becoming involved in partisan politics;
- Causing congestion, disruption, disablement, alteration, or impairment of agency networks or systems.
- Maintaining, organizing, or participating in non-work-related Web logs ("blogs"), Web journals, "chat rooms" or private/personal instant messaging.
- Failing to log off any secure, controlled-access computer or other form of electronic data system to which you are assigned, if you leave such computer or system unattended.
- Using recreational games; and/or
- Defeating or attempting to defeat security restrictions on agency systems and applications.

Email messages may not contain material that is offensive nor should they contain racial, ethnic, religious or sexual slurs, or any other language that is inappropriate. "Material" is defined as any visual, textual, or auditory entity. Such material violates the Housing Authority anti-harassment policies and is subject to disciplinary action. Use of agency resources for illegal activity can lead to disciplinary action, up to and including dismissal and criminal prosecution. The Housing Authority will comply with reasonable requests from law enforcement and regulatory agencies for logs, diaries, archives, or files on individual Internet activities, e-mail use, and or computer use.

The Avon Park Housing Authority reserves the right to monitor, retrieve, and read all email message and electronic transmissions.

PERSONAL APPEARANCE 2.25

Staff members of the Avon Park Housing Authority are expected to show a well-groomed, neat appearance. Radically unconventional dress or personal grooming, including, but not limited to, ~~excessively long hair on male staff members, untrimmed male facial hair, excessive makeup on female staff members, short skirts or tank tops,~~ are is prohibited.

~~The staff member's immediate supervisor will decide if that staff member is in violation of the dress code. In such cases, the staff member will be asked to go home and change into appropriate dress. The time involved in doing this shall be unpaid.~~

DRESS CODE 2.26

The Avon Park Housing Authority observes a relaxed business dress code during business hours. Relaxed business dress is defined as attire that is clean, neat, modest and not suggestive and/or offensive in nature. ~~does not allow the following:~~

- ~~• jeans with holes~~
- ~~• dyed jeans~~
- ~~• shorts (shorter than four fingers above the knee)~~
- ~~• tee shirts~~
- ~~• tank tops~~
- ~~• flip flop sandals~~
- ~~• sweats~~
- ~~• dirty clothes~~

Appropriate business dress is required at all Housing Authority functions where board members are present, business meetings involving staff, when the employee represents the Housing Authority at meetings outside the agency, and other business events determined by the CEO. ~~The CEO will attempt to give five days notice of a date when business dress is required.~~

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Staff members who do not wear appropriate business dress on such a date will be asked to go home and change.

CODE OF ETHICS form 2.27

By signing this code of ethics, I affirm that:

- I will not discriminate against anyone on the basis of race, color, creed, age, sex, religion or nationality.
- I will not engage in or condone any type of harassment or discrimination.
- I will not use my relationship with The Avon Park Housing Authority to further my own interests.
- I will show a sincere interest in those the Housing Authority serves and will act always in their best interests.
- I will respect the privacy of those the Housing Authority serves.
- I will observe confidentiality when dealing with records of any person that the Housing Authority serves.
- I will observe confidentiality toward fellow staff members, job applicants and the Avon Park Housing Authority itself, as necessary and as expected.
- Upon termination of my employment with the Avon Park Housing Authority, I will maintain necessary confidentiality regarding information obtained about the Housing Authority or those it serves.
- I will treat other staff members with respect, fairness, courtesy and good faith.
- I will avoid relationships with the public or other staff members which could compromise my professional judgment.
- If a fellow staff member has violated this code of ethics, or any other ethical standards, I will bring it to the attention of that individual. If this fails to correct the problem, I will report it to my supervisor.
- I will abide by the Avon Park Housing Authority Policies related to public statements about the Housing Authority
- I will commit to providing the highest quality of service to those the Avon Park Housing Authority serves.
- I will ask for assistance if a problem adversely affects my ability to perform my duties.
- I understand that violation of any part of this code may be grounds for disciplinary action, up to and including termination.

Staff member signature

Date

CLIENT CONFIDENTIALITY 2.28

In the course of their jobs, staff members at the Avon Park Housing Authority may gain information of a confidential nature about the people the organization serves. Staff members are directed not to discuss such information outside the organization. Violation of this policy may result in termination and possible legal action.

CONFLICT OF INTEREST 2.29

The Avon Park Housing Authority expects its staff members to act at all times in the best interests of those it serves. A conflict of interest takes place when the interests of a staff member, or an outside party, either affect or give the perception of affecting the Housing Authority in a negative way.

The following may lead to a conflict of interest:

- **Outside business interests.** Staff members may have outside business interests. They may not earn a profit from those business interests that are a direct result of their affiliation with the Avon Park Housing Authority.
- **Gifts and gratuities.** Staff members may not accept items of value including, but not limited to, gifts, gratuities, free trips or personal property from outside parties or organizations, if those gifts are an actual or potential inducement to provide services.
- **Personal beliefs.** The Avon Park Housing Authority recognizes that staff members can and do hold a range of beliefs, values and commitments. These can become a conflict of interest when they interfere with the operation of the organization, e.g., when staff members use organization time to further their personal beliefs.

OUTSIDE EMPLOYMENT/MOONLIGHTING 2.30

Outside employment is defined as any employment by staff members of the Avon Park Housing Authority in addition to their regular jobs with the Housing Authority. While the Housing Authority recognizes the right of staff to work outside their job, such outside employment is subject to the following conditions:

- Employment shall not interfere with the performance of the duties of the staff member's regular job.
- The employment shall not constitute a conflict of interest with the staff member's regular job.
- The employment shall not occur during the staff member's regular working hours unless the staff member is on vacation or on approved leave without pay.

Staff with outside employment shall inform their immediate supervisor in writing about the employment, and shall include the following information about their outside job: their job title, the name of the employer and the hours of work.

CHANGES IN PERSONAL DATA 2.31

All personal data changes must be reported in a timely manner to the administrative office. All changes affecting a staff member's category of employment, pay or benefits must be reported using the Payroll/Status change notice. Supervisors and individual staff members are responsible for reporting personal changes.

Supervisors submit and approve all changes that affect benefits, pay, employment status or the number of work hours (e.g., part-time to full-time, a change to number of hours worked in a week, pay increases).

Individual staff members are responsible for notifying the administrative office promptly of any personal data changes not due to organizational actions. These can include personal mailing addresses; telephone numbers; number and names of dependents; addition, loss or renewal of any license or special credentials; individuals to be contacted in the event of an emergency; educational accomplishments and other such status reports that should be accurate and current at all times.

BULLETIN BOARDS 2.32

Staff members who wish to post information on Avon Park Housing Authority bulletin boards must first submit to their supervisor the information they want posted. The supervisor shall determine if the information is appropriate for posting. Information that can be viewed as political, editorial, racial, of a sexual nature, or construed as possibly offensive in nature, will not be permitted. Violation of this policy may subject employees to disciplinary action.

EMERGENCY/WEATHER CLOSINGS 2.33

Emergencies like inclement weather, fires, power failures, hurricanes, or tornadoes, occasionally may disrupt The Avon Park Housing Authority operations. In extreme cases, these circumstances may require closing or delaying the opening of the Housing Authority. If such an emergency occurs during non-working hours, every attempt will be made to notify staff members by telephone. The Housing Authority management will also contact ~~local radio and television~~ the local radio stations to broadcast closing announcements.

Staff members are not expected to work during an emergency closing. The absence will be considered an excused absence and will not be charged to earned leave time. Should an emergency closing occur while staff members are already on earned leave time (i.e., sick, vacation, personal time), those staff members are not entitled to additional pay.

Staff members who do not report for work because of the weather, in the absence of an official closing, will be charged one day of vacation.

DRUG-FREE WORKPLACE 2.34

It is the purpose of the Avon Park Housing Authority to help provide a safe and drug-free work environment for our clients and our employees. With this goal in mind the Avon Park Housing Authority has established the following guidelines for maintaining a drug-free workplace.

The unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited on the premises of the Avon Park Housing Authority. Appropriate disciplinary actions, which may include termination, will be taken against employees of the Housing Authority for violations of this prohibition. Staff members violating this policy may face disciplinary action, up to and including termination, for a first offense. "Controlled substance" for purposes of this statement means a controlled statement listed in schedule 1 through V of section 202 of the Controlled Substances Act (21 U.S.C. Section 812), and as further defined by Federal regulations (21 C.F.R. Section 1300.11 through .15). This list includes, but is not limited to, marijuana, heroin, PCP, cocaine and amphetamines.

The Avon Park Housing Authority explicitly prohibits:

- The use, possession, solicitation for, or sale of narcotics or other illegal drugs, alcohol, or prescription medication without a prescription on the agency or customer premises or while performing an assignment.
- Being impaired or under the influence of legal or illegal drugs or alcohol away from the agency or customer premises, if such impairment or influence adversely affects the employee's work performance, the safety of the employee or others, or puts at risk the Avon Park Housing Authority's reputation.
- Possession, use, solicitation for, or sale of legal or illegal drugs or alcohol away from the agency premises, if such activity or involvement adversely affects the employee's work performance, the safety of the employee or of others, or puts at risk the Avon Park Housing Authority's reputation.
- The presence of any detectable amount of prohibited substances in the employee's system while at work, while on any premises of the Avon Park Housing Authority or related companies. "Prohibited substances" include illegal drugs, alcohol, or prescription drugs not taken in accordance with a prescription given to the employee.

The Avon Park Housing Authority will conduct drug testing under any of the following circumstances:

- **PRE-EMPLOYMENT:** A pre-condition of employment is the successful completion of a Drug Test at a lab and time established by the Avon Park Housing Authority.

- **RANDOM TESTING:** Employees may be selected at random for drug testing at any interval determined by the Avon Park Housing Authority.
- **FOR CAUSE TESTING:** An employee may be asked to submit to a drug test at any time the Housing Authority feels that the employee may be under the influence of drugs or alcohol, including, but not limited to, the following circumstances: evidence of drugs or alcohol on or about the employee's person or in the employee's vicinity, unusual conduct on the employee's part that suggests impairment or influence of drugs or alcohol, negative performance patterns, excessive and unexplained absenteeism or tardiness.
- **POST-ACCIDENT TESTING:** Any employee involved in an on-the-job accident or injury under circumstances that suggest possible use or influence of drugs or alcohol in the accident or injury event may be asked to submit to a drug and/or alcohol test. "Involved in an on-the-job accident or injury" means not only the one who was injured, but also any employee who potentially contributed to the accident or injury event in any way.

If an employee is tested for drugs or alcohol outside of the employment context and the results indicate a violation of this policy, the employee may be subject to appropriate disciplinary action, up to and possibly including discharge from employment. In such a case, the employee will be given an opportunity to explain the circumstances prior to any final employment action becoming effective.

From time to time, the Avon Park Housing Authority will provide staff training on drug abuse and will explain this policy and explain help available to staff members who have drug abuse problems. To help these staff members, the Housing Authority may offer the following rehabilitative help:

- health benefits for substance-abuse treatment
- information about community resources for assessment and treatment
- access to counseling programs

Staff members convicted of violating a criminal drug statute must inform the CEO of such conviction within five days of the conviction's occurrence. Failure to do so may result in disciplinary action, up to and including termination.

As an alternative to disciplinary action, the organization may offer staff members who violate this policy, the opportunity to take part in a rehabilitation or drug abuse assistance program. When staff members accept entry into such a program, it is their responsibility to satisfactorily participate in the program as a condition of continued employment.

IDENTIFICATION BADGES 2.35

All new staff members will be given an Avon Park Housing Authority photo identification (ID) badge. ID badges must be worn on duty as identification for other staff, clients and their families. Staff members are responsible for their identification badge. In the case of a lost ID badge, the staff member will be charged a ~~\$5 replacement fee.~~ for the cost of replacement.

All ID badges must be returned to the Housing Authority when employment is terminated.

OPEN DOOR 2.36

The Avon Park Housing Authority recognizes that staff may feel uncomfortable bringing a question or concern to their immediate supervisor. For this reason, the CEO of the Housing Authority operates in an "open door" manner.

Staff members are encouraged to make brief visits to the CEO's office to discuss a workplace issue, give input, or make a work-related suggestion. The CEO will make every effort to be accessible for open door meetings.

However, it should be understood that this open door policy does not eliminate the need to follow the chain of command and the Avon Park Housing Authority grievance policy.

PERSONNEL FILES 2.37

All staff personnel files are the property of the Avon Park Housing Authority and will be treated with strict confidentiality. Staff members may review their personnel files, which are located in the administrative office. Staff reviewing their personnel files:

- must do so in the presence of the CEO or an assigned representative.
- may request a copy of their personnel file or documents in the file. Such copies will be duplicated in the administrative office only, and only by the CEO or the staff member's immediate supervisor. Copying will cost ~~ten~~ fifteen cents a copy, payable in advance.

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Both at and following the time you separate from employment, you may make copies of documents in your personnel file if you wish. Copying of such documents should be arranged with the CEO, as the official Records Custodian. The cost will be ~~ten~~ fifteen cents per copy, payable in advance. Your personnel file will be maintained in company archives in accordance with all applicable legal requirements and State of Florida Records Retention Laws.

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All information contained in personnel files shall be considered confidential and may not be divulged to individuals other than the custodian of the file and the employee without the express written permission of the employee.

Information may be released without the permission of the employee when the custodian of the file is presented with a valid request for information made in accordance with a state or federal public record statute.

SECURITY OF PERSONNEL/MEDICAL INFORMATION 2.38

All personnel files shall be handled in a secure manner to protect the confidential nature of such files.

The privacy of employees' medical information is protected by:

1. Any medical information concerning employees will be maintained in separate, confidential medical files separate from regular personnel records. Only authorized employee may have access to such files.
2. Medical information concerning employees is absolutely confidential under state and federal laws and may not be discussed at any time with any person under any circumstances, unless an employee needs to do so in order to carry out his or her job duties, or unless the person discussing the information is talking with the subject of the information at that person's invitation. If an employee is concerned about a possible medical condition on the part of a coworker, the employee must not discuss such concern with anyone other than the CEO.
3. Any employee found to have discussed medical information about another employee with anyone else in violation of this policy, or who is found to have released such information without authorization, will be subject to severe disciplinary action, up to and possibly including immediate termination from employment. In addition, state and federal laws may subject such an employee to both civil and criminal action in a court of law.

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MAIL AT THE AVON PARK HOUSING AUTHORITY 2.39

The Avon Park Housing Authority will open and route all mail received at the Avon Park Housing Authority address. For this reason, staff members should not use the Housing Authority as a personal mailing address.

Staff using The Avon Park Housing Authority address as a personal mailing address will be asked to have their personal mail delivered to an address other than that of the Housing Authority. Staff will be allowed 30 days for personal mail to be delivered to their new address before any disciplinary action is taken. Violations after this 30-day period may lead to disciplinary action, up to, and including termination.

~~AIDS AND OTHER LIFE-THREATENING ILLNESSES 2.40~~

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The Avon Park Housing Authority recognizes that many employees with life-threatening illnesses desire to lead normal lives which includes working as long as their health permits. Employees are encouraged to continue working as long as they are able to perform, and their illness presents no threat to themselves, other employees, or clients.

Employees with ~~AIDS or other~~ life-threatening illnesses are entitled to the same employment benefits as are other workers in the organization who have medical problems.

The Housing Authority will attempt to supply pertinent medical information to supervisors and other employees when a co-worker has a life-threatening illness. Supervisors and other employees should be aware that continued employment for a worker who has a life-threatening illness, may have a therapeutic value and contribute to the individual's remission or recovery process.

Supervisors should remember that all medical records of employees are confidential. The Avon Park Housing Authority reserves the right to require an employee to undergo a medical examination by a doctor chosen by the Housing Authority whenever there is a question of an employee's fitness to work or where there is reason to fear that a worker's condition might pose safety or health hazards for other employees.

The Avon Park Housing Authority will make reasonable job accommodations, where necessary, to assist employees with life-threatening illness.

NEW STAFF MEMBER ORIENTATION 3.1

All new staff members of the Avon Park Housing Authority will be given a new staff member orientation. The purpose of this orientation is to give newly hired staff sufficient information so that they can become familiar with the policies and benefits and the overall operation of the Housing Authority.

ANNIVERSARY DATE 3.2

A staff member's official anniversary date is the first day the staff member reports to work. The anniversary date is used to compute some conditions of employment, including performance evaluation and certain benefits administration.

INTRODUCTORY PERIOD 3.3

All new staff members at the Avon Park Housing Authority work on an introductory basis up to the first 90 calendar days after their date of hire. The introductory period gives new staff members the opportunity to demonstrate their ability to perform according to Avon Park Housing Authority standards. During this time, the Housing Authority will evaluate the staff member's capabilities, work habits and overall performance.

Any significant absence from work by a staff member during this period will automatically extend an introductory period by the length of that absence. If the Housing Authority determines that the designated introductory period is not sufficient to evaluate the staff member's performance, the introductory period may be extended. Either the staff member or the Avon Park Housing Authority may end the employment relationship at-will any time during or after the introductory period, with or without cause.

On satisfactory completion of the introductory period, staff members will be classified as regular staff members.

~~During the introductory period, new staff members who have completed three months of employment and are scheduled to work at least 40 hours per week are eligible~~

to enroll in Housing Authority medical, dental, disability and life insurance benefit plans. After becoming regular staff members, they may also be eligible for other Housing Authority provided benefits, subject to the terms and conditions of each benefit program.

A regular staff member who is promoted or assigned to another job is subject to these policies. Regular staff members already receiving benefits will retain those benefits if promoted or reassigned.

Staff members may be terminated at any time during the introductory period if their performance fails to meet minimal performance standards.

EMPLOYMENT OF RELATIVES 3.4

It is the Housing Authority's policy not to hire relatives of present employees or Commissioners unless deemed to be in the best interest of the Authority and approved by the CEO. In no case will relatives be hired to work directly for or supervise a relative. For purposes of this policy, relatives shall mean: spouse, son, daughter, father, mother, brother, sister, in-laws, step-parent, step-child, grandparent, grandchild, or other members of the employee's immediate household. This policy also applies to employees whose relationship is similar to that of persons who are related by blood or marriage.

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In the event that two staff members within the same program site become related, those staff members are required to bring this to the attention of the CEO. If the CEO determines that the staff members are not in a supervisor/subordinate relationship, they may be permitted to continue their employment as long as it is in the best interests of the Housing Authority. If the staff members are determined to be in a supervisor/subordinate relationship, one must transfer to another program site, for which he/she is qualified, if one is available. If no such position is available or does not become available within 90 days, one staff member must resign. If the staff members can't decide who will resign with the designated timeframe, the CEO will make the decision.

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EMPLOYMENT OF COMMISSIONERS 3.5

A former member of the Board of Commissioners shall not be employed by the Authority during his/her tenure or for one year thereafter in a salaried position; such an employment relationship would constitute a conflict of interest under Section 515 of the ACC. A HUD waiver of the ACC requirements would be required from the HUD Field Office to authorize an exception to this requirement.

EMPLOYMENT STATUS AND CATEGORIES 3.6

Staff members of the Avon Park Housing Authority are designated as either non-exempt or exempt according to the requirements for overtime in federal and state wage and hour laws. Non-exempt staff members are entitled to overtime pay under the provisions of federal and state laws. Exempt staff is excused from specific provisions of federal and state wage and hour laws.

In addition to the above categories, staff members will belong to one of the following employment categories:

- **INTRODUCTORY** staff members are those who are within the first 90 calendar days of employment known as the introductory period. Staff members who satisfactorily complete the introductory period will receive a new employment classification.
- **REGULAR FULL-TIME** staff members are those who are not in a temporary or introductory status, and who are regularly scheduled to work a full-time schedule which is normally 40 hours per week. Generally, regular full-time staff members are entitled to Housing Authority benefits package, subject to the terms, conditions and limitations of each benefit.
- **REGULAR PART-TIME** staff members are those who are not assigned to a temporary or introductory status and who are regularly scheduled to work less than ~~20-25~~ hours per week. Regular part-time staff members are eligible for some benefits provided by the Housing Authority, subject to the terms, conditions and limitations of each benefit.
- **PART-TIME** staff members are those not assigned to a temporary or introductory status and who are regularly scheduled to work less than ~~20-25~~ hours per week. While they receive legally mandated benefits, (e.g,

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Social Security), they are ineligible for other Housing Authority benefits.

- **TEMPORARY** staff members are those hired as interim replacements, to temporarily supplement the workforce or to assist in the completion of a specific project. Employment assignments in this category are of a limited duration, normally not exceeding one year. Employment beyond any initially stated period, however, does not in any way imply a change in employment status. Temporary staff members retain that status until notified of a change. While temporary staff members receive all legally mandated benefits, they are ineligible for all of the Housing Authority's other benefits.
- **CASUAL** staff members are those who have established an employment relationship with the Housing Authority but who are assigned to work on an intermittent and/or unpredictable basis. They receive all legally mandated benefits but are ineligible for all of the Housing Authority's other benefits.

JOB DESCRIPTIONS 3.7

All staff members at the Avon Park Housing Authority will have job descriptions. Each job description will reflect the actual job functions and requirements for the job. All staff members will read and sign their job descriptions, which will then go into their personnel files.

The job description may be revised to include changes in qualifications, duties, supervision or other job-related areas. When a job description is revised, the staff member will read and sign it. The revised job description will go into the staff member's personnel file.

The job description will be used as part of the evaluation criteria during the employee's performance evaluation.

CERTIFICATION FEES/BONDING 3.8

The Avon Park Housing Authority will pay the certification fee for staff members when the license is required as part of the credentials those staff members need to perform their duties.

If for any reason an employee is required to be bonded, the Authority shall pay the cost of the bond or insured risk policy. An example would be for a Notary Public. Failure to be bonded may be cause for demotion or termination.

WORK SCHEDULES 3.9

The Avon Park Housing Authority has adopted a forty-hour workweek. Due to the complexity of the Housing Authority and the demands of different programs, work schedules will vary. Supervisors are responsible for informing their staff members of the normal work schedule.

From time to time, unusual circumstances, or work demands, may make it necessary to temporarily change a regular work schedule. Attempts will be made to schedule changes in work schedules at the earliest possible time, with consideration given to staff members' previous commitments. Staff members, however, are expected to cooperate in the best interest of the Housing Authority.

BREAKS/REST PERIODS 3.10

Two rest periods may be permitted during a scheduled workday. One rest period may be permitted for those staff members working a four-hour continuous shift. Each rest period is not to exceed 15 minutes and should not seriously interrupt the normal flow of work.

Break time may not be taken in conjunction with other time off such as lunch, or at starting or closing time. Breaks should be taken on the premises.

MEAL PERIODS 3.11

Full-time staff members, and part-time staff members who work full-time hours, i.e., at least eight hours on a given day, will be given an uninterrupted 60-minute meal period. Supervisors will schedule meal periods to accommodate operating requirements. Staff members will be relieved of all responsibilities during meal periods and will not be compensated for that time. Staff members will be required to punch out during meal periods if a time clock is in force.

MILEAGE 3.12

When the Avon Park Housing Authority staff members must use a personal vehicle to travel on Housing Authority business, they will be reimbursed for mileage expense at the current rate set by the U.S. Internal Revenue Service.

EMPLOYEE EXPENSE ACCOUNT 3.13

Employee Expenses and Reimbursement

All company travel, conference, and meeting expenses must clearly serve the objectives of the Avon Park Housing Authority and should not conflict with the ethical standards of the Housing Authority.

Travel Expense

The claims of employees for reimbursement of actual travel expenses incurred while traveling on official business of the Housing Authority shall be submitted on the Housing Authority expense statement, and approved by the CEO before reimbursement is made. All actual travel expenses shall be verified by receipts, when possible.

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Requests for reimbursements shall be presented on a Housing Authority expense statement. The expense statement should include the date of travel, place, business purpose (reason for travel) and amount of reimbursement requested.

The expense statement must be turned into the accounting office within 30 days of the incurred expense. Qualifying expenses should include all necessary details and the expense statement should be signed by the employee. Expense statements are subject to approval by the CEO.

Travel

After one year of service, out-of-state travel may be available to professional staff that is in good standing with the Housing Authority. If air travel is required, all personnel will travel economy class. Flight insurance is not reimbursed.

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In preparing for company travel, if out-of-state travel is required, prior approval must be obtained from your supervisor/manager. A Trip Request form should be completed which details the itinerary, estimated cost, and business purpose of your travel.

Travel Advances

Travel advances are intended to allow employees the convenience of using the Housing Authority's money for business purposes. The travel advance should be equal to the expected out-of-pocket cash expenses for the travel period.

Travel advance requests shall be approved by the CEO on a standard form completed by the employee. ~~Advances may not exceed \$500.~~ Travel advance requests for the CEO shall be approved by the Chairman of the Board. The advance shall be accounted for on the Avon Park Housing Authority expense statement by deducting it from the employee's claimed expenses. If the travel advance exceeds the claimed expenses,

employees shall attach a check to the expense statement made payable to the Avon Park Housing Authority for the difference.

Lodging Expenses

Lodging expenses are to be reimbursed at actual cost. Unless special circumstances dictate otherwise, mid-price lodging facilities shall be selected. ~~Room accommodations will be honored only for one person per room, per night unless employees share a room.~~ Expenses for a non-employee are not reimbursable. Should a non-employee companion accompany the employee on a business trip, the "single" rate for lodging must be noted on the copy of the bill and expense statement. Lodging expenses are limited to the cost of lodging only, meals and incidentals charged to the room are the responsibility of the traveler as meals are reimbursed at the per diem rate.

~~Reimbursement for food and other incidental travel expenses will be reimbursed at current per diem policy rate. Receipts must be obtained for meals and other cash expenses.~~

Meals

Travel- The Avon Park Housing Authority will reimburse employees' meals when they are required to travel for business purposes away from the Housing Authority office, or away from their homes, if they do not come to the office. A maximum gratuity of 15% may be added. Requests for meal reimbursement shall be presented by the employee on a Housing Authority expense statement with a copy of the receipt (showing gratuity amount separately).

Business- The Housing Authority will reimburse employees for meals where there is a substantial and bona fide business purpose for the meal. It must be approved by the CEO in advance. These may involve the use of Housing Authority funds to purchase a meal for a representative of a local government, a third party who represents an organization that has direct business dealings with the Housing Authority, etc. In addition to the documentation mentioned above for meals of this type, the Avon Park Housing Authority expense statement should also include the business purpose of the meal (what was discussed), the names of the persons present, and their relationship to the Avon Park Housing Authority.

Other- All other meals, such as meals incurred while in training, will be reimbursed only with prior approval of the employee's immediate supervisor. The documentation requirements are the same as those listed above.

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TECHNOLOGY 3.14

The Avon Park Housing Authority respects the right to privacy of its staff members. However, privacy does not extend to staff members' use of Housing Authority provided technology, including computers, voice mail, e-mail and the Internet.

The following rules will govern technology use at the Housing Authority:

- Computer, voice mail, e-mail and the Internet are Avon Park Housing Authority -owned and for business purposes only.
- All online activities are subject to monitoring, and no staff members should expect privacy regarding such use.
- Unacceptable, non-work related activities, including downloading, viewing or sending insulting, disruptive, offensive, derogatory, profane or discriminatory messages or material, are prohibited. Examples of forbidden transmissions can include sexually-explicit messages, cartoons or jokes; unwelcome propositions or love letters; ethnic or racial slurs; or any other messages that can be construed to be harmful to morale, harassment or disparagement of others based on their sex, race, age, national origin or religious beliefs.
- Only system passwords and encryption keys assigned by the Avon Park Housing Authority may be used on Housing Authority computers. Passwords and encryption keys are proprietary and, as such, may not be disclosed or assigned to anyone without the express prior authorization of Housing Authority management. Staff members are prohibited from using passwords or encryption keys to gain access to unauthorized materials.
- All e-mail messages sent from Avon Park Housing Authority computers contain a header identifying the organization. Because online communications are not secure, prior to transmitting any information that is of a confidential or proprietary nature or that may include company trade secrets, authorization must be obtained from your supervisor, and the information must be properly encrypted. Staff members are prohibited from creating or sending inappropriate messages or unprofessional communication discussing the organization, its staff members, those it serves, or its competitors.
- The Avon Park Housing Authority licenses the use of computer software from a variety of outside sources. It does not own this software or its related documentation, and it does not have the right to reproduce, use or otherwise copy that software, without the permission of the software provider.

Unauthorized copying or use of software on any medium is strictly prohibited.

- Staff members must respect copyright, trademark, trade secret, patent, license, policy and other proprietary rights and restrictions relating to the use, access or download of software or information.
- In addition to possible civil or criminal prosecution, the Avon Park Housing Authority reserves the right to discipline staff members for violation of this policy, up to and including termination.

~~STAFF MEETINGS 3.15~~

~~The Avon Park Housing Authority programs, teams and departments hold regular meetings for their staff members. Staff members are expected to make every effort to attend these meetings. The purpose of staff meetings is to update staff on Housing Authority events, policies, procedures; to discuss workplace problems and offer possible solutions; and to make suggestions about improving Housing Authority services.~~

~~ROUND TABLE MEETINGS 3.16~~

~~The Avon Park Housing Authority encourages two-way communication between its top management and staff members. For this purpose, it will hold quarterly Round Table meetings. These meetings are hosted by the CEO, who will be the only representative of the Avon Park Housing Authority management team. The meetings are designed to give staff members an opportunity to discuss serious workplace issues or concerns directly with the CEO. Staff members will be notified in advance of the time and place of each Round Table meeting.~~

~~It should be understood that this policy does not eliminate the need to follow the chain of command and the Avon Park Housing Authority grievance policy.~~

VOLUNTEERS 3.17

The Avon Park Housing Authority welcomes volunteers and recognizes the valuable contributions they make to the Housing Authority programs and services. To be accepted as volunteers, candidates must complete an application form, undergo a reference check and a personal interview.

Volunteers are expected to observe the same rules and code of conduct as all other staff members. Volunteers may be terminated at any time for any reason.

VISITORS TO THE AVON PARK HOUSING AUTHORITY 3.18

To protect the safety and security of staff and those we serve, the Avon Park Housing Authority requires all visitors to check in at the receptionist's desk upon arrival.

Should a visitor go directly to any other area on Housing Authority property, staff members should report it to the receptionist and direct the visitor to the receptionist's desk. The receptionist will then follow Housing Authority procedure regarding visitors.

PAY PERIOD 4.1

Payday is biweekly. Paychecks are issued biweekly on the Wednesday immediately following the previous pay period. When a payday falls on a holiday, checks are distributed the business day prior to the holiday. Employees are paid via direct deposit to the bank of their choice on a bi-weekly basis. Direct deposits are posted by the payroll department on the last Friday of the pay period and funds will be available in the employees account based on the policies of the employee's bank.

If a regular payday falls during an employee's scheduled vacation the employee may receive his or her earned wages before departing for vacation if a written request is submitted at least one week prior to departing for vacation.

Deductions to paychecks include federal income tax, Social Security/Medicare tax, and voluntary deductions including health insurance, short-term disability and retirement plan contributions.

PAYROLL DEDUCTIONS 4.2

There are two types of deductions from staff members' paychecks:

1. Mandatory deductions include: federal, state, local withholding and Social Security/Medicare taxes deducted from the paycheck, according to applicable regulations, prior to being issued.

2. Voluntary deductions include: upon written authorization from the staff member, the nonprofit will deduct from the staff member's paycheck any voluntary benefits currently available.

Staff members who have questions about deductions should ask the Comptroller.

OVERTIME 4.3

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The Avon Park Housing Authority recognizes that operating requirements or other needs may not always be met during regular working hours. In such a case, staff members may be given the opportunity to volunteer for overtime work assignments. All overtime work must receive the supervisor's prior authorization. Every effort will be made to distribute overtime assignments as equitably as practical to all staff members qualified to perform the work.

Overtime compensation is paid to all non-exempt staff members in accordance with federal and state wage and hour law. Overtime pay is based on actual hours worked. Time off for sick leave, vacation leave, holidays, personal time, or any leave of absence, will not be considered hours worked for purposes of performing overtime calculations. Overtime wages are computed at 1.5 times the employee's regular rate of pay. Overtime is paid for hours actually worked over 40 during a workweek. This does not include time compensated for, but not worked, such as sick leave and holiday pay.

The employee may receive compensatory time off in lieu of overtime pay if there is an agreement with the employee prior to the work being performed. The agency can compensate the employee by giving the employee compensatory time off of one and one-half (1 ½) hours for each hour worked beyond 40 hours. However, no employee may accumulate more than 240 hours of compensatory time off. The 240 hour limit represents no more than 160 hours of actual overtime worked, since compensatory time is calculated at time and one-half. Further, an employee who has accrued compensatory time off shall be paid for the unused compensatory time upon termination of employment.

In certain circumstances, the Housing Authority may require staff members to work overtime.

Failure to work scheduled overtime, or overtime worked without prior authorization from the supervisor, may result in disciplinary action, up to and including termination.

GARNISHMENTS FROM PAY 4.4

Where federal and state laws are applicable, the Avon Park Housing Authority will process legal garnishments, wage assignments and other court orders, withholding a staff member's wages.

All documents related to wage attachments will be processed through the CEO Comptroller and will be held in strict confidence.

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The Avon Park Housing Authority will accept and process:

- government liens
- garnishments
- wage assignments that are court-ordered
- any other wage assignments

The Housing Authority expects its staff members to handle their financial affairs in such a way that they do not cause lost work time, inconvenience or expense to the Housing Authority.

While federal law allows termination for three or more garnishments, the Housing Authority will not terminate staff members solely on the basis of court-ordered child support payments.

PAYCHECK ERROR 4.5

The Housing Authority takes all reasonable steps to ensure that employees receive the correct amount of pay in each paycheck and that employees are paid promptly on the scheduled paydays. In the unlikely event that there is an error in the amount of pay, the employee should promptly bring the discrepancy to the attention of the Comptroller or CEO so that corrections can be made as quickly as possible. If the employee has been underpaid the agency will pay the employee the difference as quickly as possible. If the employee has been paid in excess of what he or she has earned the employee will need to return the overpayment to the agency as soon as possible. If a wage overpayment occurs, the overpayment will be regarded as an advance of future wages payable and will be deducted in whole or in part from the next available paycheck(s) until the overpaid amount has been fully repaid. Each employee will be expected to sign a wage deduction authorization agreement authorizing such a deduction.

We ask that employees realize that pay errors are not intentional and that employees be understanding if such an event occurs.

PERFORMANCE EVALUATIONS 4.6

All employee's work performance and work attitudes will be evaluated in writing yearly by their immediate supervisors. The purpose of such evaluations is to inform each employee of his/her progress and how his/her performance, if indicated, can be improved. In addition, such performance appraisals will be used to assess each employee's potential for advancement and will be a major factor in personnel actions including both merit pay increases and discipline.

Frequency of Performance Ratings Probationary employees, including newly employed persons, and/or employees promoted, demoted or transferred to new positions will be evaluated after 3 months of employment and finally after 6 months of employment. If the probationary period is extended the employee must be informed by writing, with a copy in the employee file, that a written evaluation will be performed at the termination of the extended probationary period. All other employees will be evaluated annually.

THE AVON PARK HOUSING AUTHORITY conducts two types of performance appraisals: **informal and formal:**

Informal appraisal will consist of a meeting between employee and supervisor to discuss supervisor observations of employee work. The supervisor may keep notes of the evaluation discussion if the supervisor deems the issues discussed to be serious enough for documentation.

The purpose of informal appraisal is to:

- Give the employee early guidance about correcting performance problems.
- give the supervisor an opportunity to affirm good work by the employee.
- give the employee opportunity to ask questions about improving performance.

Formal appraisals will be conducted at 12 months from the staff member's anniversary date or change in job assignment. When there is a change in an employee's job classification a new anniversary date is established for yearly evaluation purposes.

The purpose of formal evaluation is to:

- Assist the employee to be a better employee.
- Document, in writing, the quality of the employee's performance.
- Give the supervisor opportunity to affirm good work by the employee.
- Give the employee opportunity to ask questions about improving performance.
- Set goals for improved employee performance.

As the first step in formal evaluation, staff members are required to complete a self-evaluation narrative and submit it to their supervisor.

The supervisor will then:

1. Evaluate the staff member's work skills.
2. Appraise the staff member's attainment of previously set goals and completion of the improvement program.
3. Set deadlines for self-improvement and mutually-agreed upon goals that are to be attained during the next appraisal period.

Written and oral appraisals by supervisors are encouraged as a part of the performance evaluation.

PERFORMANCE STANDARDS 4.7

Performance standards shall be established by the CEO according to the general and specialized needs of the Authority, each of its programs, and to the particular features of each position description. Employees shall be made aware of the prevailing standards.

Each evaluation shall distinguish between five (5) levels of performance, and as to overall performance as follows.

- a. "Outstanding" – Performance consistently above the standard.
- b. "Above Average" – Performance occasionally above the standard.
- c. "Satisfactory" – Performance meets the standard.
- d. "Unsatisfactory" – Performance consistently below the standard.

The calendar period covered by the evaluation shall be stated clearly. When an employee's performance is evaluated as other than "Satisfactory", the CEO shall attach a written explanation of the reasons for finding a level of performance other than satisfactory. Further, evaluation of "below average" and "unsatisfactory" shall be accompanied by a written explanation of suggested corrective actions to be taken by the employee.

MERIT-SALARY INCREASES 4.8

The Avon Park Housing Authority supports the creation and administration of a responsible compensation system that is equitable and provides reasonable compensation to ensure that qualified individuals can be employed and retained. As one component of the compensation system, merit pay is to encourage, recognize, and reward continuing excellent performance. Full time employees are eligible to participate in the merit award process. The Housing Authority distributes monetary merit increases when funds are available.

There are two types of pay increases under this section:

Cost of Living Index Pay Increase

An employee is eligible to advance within salary range by means of a merit increase each year on the anniversary of his/her successfully passing probation based upon the cost of living index.

Performance-Based Merit Pay

Merit pay increases of varying amounts and duration may be granted for superior performance over a period of time. This is a one-time payment spread out over a year and exempt from Retirement Plan withholdings.

Merit Pay Increases shall not:

- Occur more than once in any fiscal year; or
- Occur simultaneously with a promotion where there is a salary increase.

This merit increase, however, is not automatic; the employee must be considered "meritorious" in accordance with Housing Authority evaluation procedures.

Merit increases ranges are determined by the Board of Commissioners and generally are not to be less than 1% or more than 5%. The merit increase will be determined on an individual basis, solely on merit in accordance with the Housing Authority's evaluation procedures, and approved by the CEO.

Any pay increases or action affecting the CEO shall be taken up for consideration in regular or special meeting of the Board of Commissioners.

PROMOTIONS 4.9

All qualified staff members will be given consideration for promotion as opportunities for advancement occur within the Avon Park Housing Authority. Promoted staff members may receive enhanced supervision as they acquire skills and knowledge to perform new duties. Promoted staff will be eligible for all compensation increases related to the new job.

SALARY INCREASES 4.10

Staff members will be eligible for a salary review after one year of employment at the Avon Park Housing Authority. Raises are not automatic and may be subject to a number of factors, including availability of funds, any pay range in place, and the staff member's individual job performance. When applicable, raises will be effective on the staff member's anniversary date, (i.e., the date of hire or position change).

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Any pay increases or action affecting the CEO shall be taken up for consideration in regular or special meeting of the Board of Commissioners.

ANNUAL BONUS 4.11

In recognition of the vital part a conscientious and productive staff plays in providing quality service, the Avon Park Housing Authority has established a bonus program. Bonuses are determined on a year-to-year basis and depend upon a healthy financial picture at year-end.

To be eligible for a bonus, staff members must meet the following criteria:

1. The employee must have completed at least one year of continuous employment.
2. Bonuses are based on merit and must be earned by exceeding job requirements as determined by each staff member's immediate supervisor.
3. Regular full-time and part-time staff members may receive bonuses. No temporary staff members are eligible.

4. Bonus availability and amount are determined as follows:

- Bonuses are based on the past fiscal year's financial statement.
- The bonuses are not to be viewed as an automatic fringe benefit, but must be approved by the Board of Commissioners prior to award. The bonus amount established by the Board of Commissioners shall be based on funding availability within the Operating Budget(s) of the agency. Individual bonus amounts shall be established by the CEO.

CEO bonus amounts shall be determined by the Board of Commissioners, supported by the agency budget(s) and incorporated/defined within the CEO's Employment Contract.

LONGEVITY BONUS & SERVICE AWARDS 4.12

The Avon Park Housing Authority recognizes and rewards staff members for outstanding service and dedication to the organization. Awards, as well as acknowledgments for service longevity, will be given annually to staff members whose job performance merits recognition.

The awards for years of service are as follows:

5 years of service = 1 day leave with pay and \$100.00

10 years of service = 1 day leave with pay and \$200.00

15 years of service = 2 days leave with pay and \$300.00

20 years of service = 3 days leave with pay and \$400.00

20+ years of service = 3 days leave with pay and \$500.00

Staff members must make a request, in advance, to their immediate supervisor for leave days. Awards will be made at the end of the fiscal year depending upon budget availability.

BEREAVEMENT LEAVE 4.13

Staff members who wish to take time off due to the death of an immediate family member should notify their supervisor immediately.

When a death occurs in the immediate family, a regular full-time employee shall be granted up to three (3) days off without loss of pay or benefits. Up to an additional two (2) days of bereavement leave shall be granted to employees who have to attend a funeral out of state.

Regular, part-time staff members may take up to one day of paid bereavement leave.

Staff members may, with their supervisor's approval, use any available paid leave for additional time off as necessary.

The Avon Park Housing Authority defines "immediate family" as the staff member's spouse, parent, child, sibling; a staff member's spouse's parent, child or sibling; a staff member's child's spouse; the staff member's or spouse's grandparents or grandchildren.

BIRTHDAY HOLIDAY 4.14

Regular full-time Avon Park Housing Authority staff members will be granted their birthday off with pay. Staff members must make arrangements with their supervisor at least one week in advance. Staff members are expected to use their birthday holiday when it is earned. When a birthday falls on a non-work day, the employee may be granted the next workday as a paid leave day.

EMERGENCY LEAVE 4.15

The Avon Park Housing Authority provides an emergency leave benefit for emergencies involving a staff member's personal property or immediate family. If personal property is suddenly and unexpectedly placed in imminent danger of severe loss or damage, or if a staff member's immediate family requires immediate assistance for unexpected reasons, the staff member will be permitted time off, charged against the staff member's sick leave, to allow correction of the emergency situation.

Staff members are expected to return to their normal work schedule as soon as the situation is under control. The CEO will determine how much time, if any, is chargeable to sick leave under this policy.

WORKERS COMPENSATION 4.16

All staff members of the Avon Park Housing Authority are covered by Workers Compensation Insurance. If a staff member is injured on the job, the staff member's immediate supervisor and CEO must be notified immediately.

The supervisor will then complete a Housing Authority Incident/ Accident Report form immediately, or by the end of the same work day and forward it to the administrative office for processing.

Staff members injured on the job, at the discretion of Housing Authority management, may receive immediate medical attention as required by law.

The agency reserves the right to require the staff member to be examined by a physician selected by the Avon Park Housing Authority, or its insurance carrier, at no cost to the staff member.

JURY DUTY 4.17

The Avon Park Housing Authority encourages staff members to fulfill their civic responsibilities by serving jury duty when required. The Housing Authority will pay a regular, full-time staff members' their regular pay during jury duty service. Staff members called to jury duty must provide the administrative office evidence of the summons for jury duty and the amount that will be paid to them by the government for jury service.

Staff members must show the jury duty summons to their supervisor no later than four days after the summons so that the supervisor can make arrangements to accommodate their absence. Staff members are expected to report for work at the Housing Authority whenever the court schedule permits. The staff member shall endorse and remit to the Housing Authority any and all payments paid to them by the government for jury service.

The Housing Authority or the staff member may request the staff member be excused from jury duty, if, in the judgment of the CEO the staff member's absence would create serious operational difficulties for the Housing Authority.

Health, vacation, sick leave and holiday benefits will continue to accrue during paid jury duty leave.

MILITARY LEAVE 4.18

The Avon Park Housing Authority will give appropriate military leaves of absence to regular full-time staff members for the following types of military duties:

- full-time active duty
- short-term active duty
- weekend drills or summer training duty

Staff members are not required to use vacation time for military training. However, they will not be paid for this additional time off.

The Avon Park Housing Authority policy complies with the Uniformed Services Employment and Reemployment Rights Act (herein after referred to as USERRA). USERRA protects civilian job rights and benefits for veterans and members of Reserve components. If an employee is going to be absent for military duty the right to retain employment rights is extended to five (5) years. The exceptions are enlistments lasting more than five years, periodic National Guard and Reserve training duty, and involuntary active duty extensions and recalls, especially during a time of national emergency. Reemployment protection does not depend on the timing, frequency, duration, or nature of an individual's service as long as the basic eligibility criteria are met.

Protection of disabled veterans would be provided in accordance with the law by the Avon Park Housing Authority with the agency making reasonable efforts to accommodate the disability. Service members convalescing from injuries received during service or training may have to up to two (2) years from the date of completion of service to return to their jobs or apply for reemployment.

Returning service-members are reemployed in the job that they would have attained had they not been absent for military service with the same seniority, status and pay, as well as other rights and benefits determined by seniority. Reasonable efforts will be made to enable returning service members to refresh or upgrade their skills to help them qualify for reemployment as necessary. Alternative reemployment positions would be offered if the service member cannot qualify for the position. While an individual is performing military service, he or she is deemed to be on a furlough or leave of absence and is entitled to the non-seniority rights accorded other individuals on non-military leaves of absence.

Health and retirement plan coverage for individuals performing military duty of more than 30 days is provided under the COBRA plan for health coverage for up to 24 months, with the employee paying 102 percent of the full premium, and the retirement

plan is protected. For military service of less than 31 days health care coverage is provided as if the service member had remained employed.

The period an individual has to make application for reemployment or report back to work after military service is based on time spent on military duty. For service of less than 31 days, the service member must return at the beginning of the next regularly scheduled work period on the first full day after release from service, taking into account safe travel home plus an eight-hour rest period. For service of more than 30 days but less than 181 days, the service member must submit an application for reemployment within 14 days of release from service. For service of more than 180 days, an application for reemployment must be submitted within 90 days of release from service.

USERRA also requires that service members provide advance written or verbal notice to their employers for all military duty unless giving notice is impossible, unreasonable, or precluded by military necessity. An employee should provide notice as far in advance as is reasonable under the circumstances. Additionally, service members are able (but are not required) to use accrued vacation or annual leave while performing military duty.

The employee has the right to be reemployed in the civilian job if they leave that job to perform service in the uniformed service and:

- have ensured that the Housing Authority receives advance written or verbal notice of the service
- has five (5) years or less of cumulative service in the uniformed services while with the Housing Authority
- return to work or apply for reemployment in a timely manner after conclusion of that service (as set out by USERRA above)
- have not been separated from service with a disqualifying discharge or under other than honorable conditions.

Any employee hired to replace a worker on Military Service leave will be informed at the point of hire that at the completion of the military service if there is no alternative position available they could be terminated to provide for the rehire of the affected employee, and would sign a statement acknowledging they have been given and accept this information.

SCHOOL VISITATION LEAVE 4.19

From time to time, staff members of school-age children must attend educational or behavioral conferences at their children's school.

The Avon Park Housing Authority will give up to eight hours of leave time to eligible staff members in any school year, for the purpose of attending conferences or meetings

at school during normal work hours. Not more than four hours of this leave time may be taken in any given day.

Staff members may take leave only if school conferences or classroom activities related to their child cannot be scheduled during non-work hours.

Staff members must be employed at the Housing Authority for at least six consecutive months prior to requesting the leave.

PERSONAL DAYS 4.20

After one year of employment, all regular, full-time staff members will receive one paid personal day. After two or more years, staff members will receive two personal days per year. Personal days may accumulate to five days.

Staff members will be allowed to take earned personal days with the prior approval of their supervisor. Requests for personal day leave should be made at least one week in advance.

After four years of employment, unused personal days will be paid upon resignation in good standing.

SICK LEAVE 4.21

The Avon Park Housing Authority provides all regular full-time employees sick leave with pay for periods of temporary absence due to illness or incapacity resulting from injury or to care for ill family members. Staff members may also use sick leave for medical appointments that cannot be scheduled at times other than working hours.

Regular full-time staff members accrue sick leave at a rate of one (1) day per month of service for a total of 12 days per year. Sick leave benefits are calculated on the basis of a

“benefit year”, the 12-month period that begins when the employee starts to earn sick leave benefits. Staff members may carry sick leave over from one year to the next, up to a maximum accrued total of 45 days.

Sick leave begins accruing from the end of the probationary period, but may not be used in advance of when it is earned. ~~Sick leave will be used in hourly increments.~~

Employees who are unable to report to work due to illness or injury should notify their direct supervisor before the scheduled start of their workday if possible. The direct supervisor must also be contacted on each additional day of absence.

If an employee is absent for three (3) or more consecutive days due to illness or injury, a physician’s statement must be provided verifying the disability and its beginning and expected ending dates. Such verification may be requested for other sick leave absences as well and may be required as a condition to receiving sick leave benefits.

Upon separation from the Housing Authority, staff members will not be paid for any unused sick leave.

Staff members are responsible for notifying their supervisor when illness prevents them from working.

A physician’s statement is required for more than three consecutive days of absence due to illness.

SICK LEAVE DONATION PROGRAM

Sick leave may be donated by another employee that has exhausted all available leave time. Such donation and assignment may be done ONLY at the discretion and approval of the CEO on a case-by-case basis. Donations will be anonymous and knowledgeable only to the CEO and Comptroller. Donated time shall be used only as required. Any excess/unused donated time allocated to the other employee shall revert back to the donors leave bank. Donated time may also be adjusted based upon the availability and receipt by employee of disability insurance benefits.

VOTING LEAVE 4.22

The Avon Park Housing Authority will provide time off to staff members, when necessary, so they may vote. All employees will be informed of the opportunity and encouraged to vote early or by Absentee Ballot to avoid any lost time to receive time off to vote, staff members must notify their immediate supervisor before noon on the day before election day. The Housing Authority may specify when during the workday time may be used to vote.

VACATION TIME 4.23

The Avon Park Housing Authority believes that rest and relaxation are essential for staff physical and mental health, and provides paid vacation for all staff members. Staff members may not take vacation days until they satisfactorily complete their introductory period.

Regular full-time staff accrues vacation time according to the following schedule:

<u>Years of Eligible Service</u>	<u>Annual Vacation Time</u>
Upon initial eligibility	8 hrs. per month
After 1 year	8 hrs. per month/12 days per year
After 5 years	10 hrs. per month/15 days per year
After 10 years	12 hrs. per month/18 days per year
After 20 years	14 hrs. per month/21 days per year

The length of eligible service is calculated on the basis of a "benefit year". This is the 12-month period that begins when the employee starts to earn vacation time, having completed the probation period. An employee's benefit year may be extended for any significant leave of absence except military leave of absence. Military leave has no effect on this calculation.

Staff members should request vacation time in advance in writing to their supervisor. The supervisor will approve the request subject to a number of factors, including business needs and staffing requirements.

As stated above, employees are encouraged to use available paid vacation time for rest, relaxation and personal pursuits. In the event that available vacation time is not used by the end of the benefit year employees may carry unused time forward to the next benefit year. If the total amount of unused vacation time reaches a "cap" equal to two times the annual vacation amount, further vacation accrual will stop. When the employee used paid vacation time and brings the available amount below the cap, vacation accrual will begin again.

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Upon termination of employment, employees will be paid for unused vacation time that has been earned through the last day of work.

Accrued Vacation/PTO Buy-Back Provision

In the event that accrued vacation is not used by the end of the benefit year employees may carry unused time forward to the next benefit year, up to the designated vacation accrual cap. Additionally, employees may elect to be paid for any accrued and unused vacation days up to 20 days per benefit year.

The employee must have sufficient vacation hours accrued at the time of the request to cover the requested cash out and maintain a minimum of 80 hours. Note: This is a one-time; annual cash out of vacation time and it does not affect the employee's accrual. Additional information for this cash out program may be discussed with the Comptroller.

To be eligible for the buy back, employee must have utilized at least half of his/her annual vacation benefit prior to, or in conjunction with employees' written request. The rate of compensation for paid-out vacation shall be the employee's then-current rate of pay at the time the request is made, and will be calculated at a straight time rate. All applicable taxes and withholding shall apply.

~~Upon termination of employment, employees will be paid for unused vacation time that has been earned through the last day of work.~~

WITNESS DUTY 4.24

The Avon Park Housing Authority encourages staff members to appear in court for witness duty when subpoenaed to do so.

If staff members have been subpoenaed by court order, or otherwise requested to testify as witnesses by the Housing Authority, the entire period of duty will be considered paid time.

Staff members will be granted unpaid time off to appear in court as a witness when requested by a party other than the Housing Authority.

Immediately after receiving a subpoena, staff members should show it to their supervisor who can then make adjustments in the work schedule to accommodate the subpoenaed staff member's absence. Staff members are expected to report for work at the Housing Authority whenever the court schedule permits.

MEDICAL INSURANCE 4.25

All regular, full-time staff members of the Avon Park Housing Authority who work at least 25 hours per week are eligible for medical benefits. Benefits will go into effect on the first of the month following 60 days of employment.

The Housing Authority will pay the majority of the cost of single coverage for eligible staff members. The staff member will pay for any dependant coverage; husband, wife, child or family, through payroll deductions.

Staff members will be given medical insurance forms during their orientation. It is the staff member's responsibility to return the completed forms to the administrative office prior to the effective date of coverage. For questions, see the insurance packet or contact the Comptroller.

For any staff member who has alternate health insurance coverage in place (for example, through a spouse's employer) may opt out of our health insurance plan and instead be paid a annual upfront stipend of \$1,500. Proof of eligible alternate coverage will be required along with your written waiver of our plan. Your other medical coverage cannot be a spouse's Avon Park Housing Authority insurance benefit.

DISABILITY INSURANCE 4.26

The Avon Park Housing Authority provides a plan to regular full-time staff members to cover long-term and short-term disability resulting from illness or injury, which would prevent a staff member from performing work duties. The Housing Authority assumes

the full cost of this coverage. Staff members are eligible to enroll in the plan following satisfactory completion of their introductory period.

A copy of the plan is available for staff members to read in the administrative office.

PAYMENT IN LIEU OF HEALTH INSURANCE 4.27

When extenuating circumstances create a situation where the employee is unable to obtain or qualify under the Avon Park Housing Authority employee health insurance or supplemental medical insurance plans regular, full-time staff members will receive a monthly payment to cover the cost from another carrier. An example would be if the agency health insurance or supplemental health insurance plan refuses to cover an employee because of a pre-existing condition and the employee has another carrier that will cover them the agency would pay the employee the amount of the monthly premium with the other insurance carrier. The cost of the insurance plan for another carrier shall not exceed or less than the employee rate of the agency health insurance or supplemental health insurance plan for group employees.

RETIREMENT PLAN 4.28

The Avon Park Housing Authority has established a retirement plan to provide employees the potential for future financial security for retirement. Regular full-time employees are eligible for participation upon the completion of six months continuous employment. Complete details of the plan are provided to eligible employees. Contact the Comptroller for more information.

LIFE INSURANCE 4.29

The Avon Park Housing Authority provides life insurance for regular full-time staff members effective the first day of the month after satisfactory completion of the 90-day introductory period. The value of this Housing Authority provided benefit shall be one times the staff member's annual salary.

Further information about the life insurance is available in the Comptroller's office.

WORKERS COMPENSATION 4.30

The Avon Park Housing Authority pays Workers Compensation Insurance premiums to protect staff members against lost wages if they experience a job-related injury or illness. To help determine if staff members are eligible for benefits under the law, it is essential that they immediately report any accident to their supervisor. The supervisor will aid in completing a Workers Compensation incident report. The supervisor will turn the completed form to the administrative office immediately. Failure to promptly report an accident may jeopardize any future insurance claims. If the Housing Authority deems medical treatment necessary, staff members injured on the job must accept it.

Staff members injured on the job may be eligible for modified work duty, including transfers to other programs, as long as this does not create undue hardship to the Housing Authority. Modified duty shall be considered a short-term, temporary position. All efforts will be made to return staff members to work under modified duty. Staff members are expected to comply with modified duty and return to work when instructed to do so by the Housing Authority, a doctor and/or the Workers Compensation Insurance company.

COBRA BENEFITS CONTINUATION 4.31

Under COBRA, staff members and their qualified beneficiaries will have the opportunity to continue their health insurance coverage under the Avon Park Housing Authority's health plan when a "qualifying event" occurs that would normally result in the loss of eligibility. Common qualifying events can include: resignation, termination of employment, death of a staff member; reduction in a staff member's hours or a leave of absence; a staff member's divorce or legal separation; and a dependent child no longer meeting eligibility requirements.

Under COBRA, the staff member or beneficiary who chooses continuation coverage must pay the full cost of coverage at the Housing Authority group rates plus an administration fee.

The Housing Authority provides eligible staff member's written notice describing their rights under COBRA when staff members become eligible. The Housing Authority will

also provide the opportunity for election of continued coverage upon separation of employment.

ANNUAL LEAVE UPON TERMINATION 4.32

Upon termination of an employee the Avon Park Housing Authority shall pay to such employee the amount of his/her accumulated annual leave. Lump sum payment for accrued annual leave at the current rate of pay will be made only upon termination of the employee.

Terminated employees will accrue the following hours of annual leave in accordance with their last day of work:

Last Day of Work	Leave Earned
1 st – 7 th	2 hours
8 th – 15 th	4 hours
16 th – 23 rd	6 hours
24 th – end	8 hours

PAID HOLIDAYS 4.33

The Avon Park Housing Authority grants paid holiday time for the following holidays:

- New Year's Day
- Martin Luther King Day
- Good Friday
- Memorial Day
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day

- Day after Thanksgiving
- Christmas Eve
- Christmas Day

Staff members who must work on any of the above holidays will receive their holiday pay and, in addition, will be paid one and one-half (1 ½) times their regular rate of pay for all hours worked on the holiday.

When any of the above holidays falls on a Saturday, Friday will be observed as the holiday. When any of the above holidays fall on a Sunday, Monday will be observed as the holiday.

Staff members who have unexcused absences on the workday immediately before or after a paid holiday will not be paid for that holiday.

In addition to the above holidays each staff member will be entitled to one "Floating Holiday" to be used within the calendar year. Often employees will use this day to celebrate their birthday but it can be used, with prior approval from the Supervisor, at any time during the calendar year that it was earned. Floating holidays do not carry over to the next year if unused.

FREE PARKING 4.34

The Avon Park Housing Authority provides free off-street parking for staff members. Staff members are responsible for parking in designated parking areas only.

The Housing Authority will not be liable for theft of or damage to any vehicles or contents thereof while parked on Housing Authority property. Staff members should be sure that their vehicles are locked and properly insured for theft and casualty losses.

OUTSIDE TRAINING 4.35

The Avon Park Housing Authority encourages staff members to attend conferences, workshops, seminars and in-service training, as funds permit, as a way to develop their skills. The Housing Authority will support their attendance.

Training will be subject to these conditions:

- Attendance at any outside training session must be approved by the CEO.

- The Housing Authority may reimburse staff members for attending conferences, including lodging, meals and travel. Staff members who wish to attend training must submit an estimated cost to the CEO who will make any final decisions on conference attendance.
- Staff members who attend a conference, workshop, seminar, training session or in-service are expected to submit a written summary of the in-service they attended.

STAFF MEMBER OF THE YEAR 4.36

The Staff Member of the Year award is established to provide a formal way to recognize staff members for their hard work and efforts to make the Avon Park Housing Authority a continued success. The following guidelines apply to the award:

- any regular, full time staff member is eligible to be nominated for the award with the exception of the CEO.
- criteria for the award are: good attendance, professionalism, commitment to those we serve a positive attitude toward the job.
- any staff member of the Housing Authority may nominate any eligible staff member.
- nominations should be in writing and explain why the nominee exemplifies the criteria above. Nominations should be placed in a designated box in the administrative office.
- the Staff Member of the Year will be chosen by senior managers after a review of the nominations.
- the Staff Member of the Year will be given a day off with pay, an award certificate and a gift certificate.

EMPLOYEE SUGGESTION PROGRAM 4.37

The Employee Suggestion Program (ESP) is a process where employees can make suggestions or offer ideas to reduce or eliminate the amount of time, money, or effort spent to perform functions relating to Avon Park Housing Authority operations.

ESP is designed to:

- motivate employees toward problem identification and problem solving.
- recognize employees as valuable resources
- reward employees by offering an opportunity to benefit from their efforts to improve operations and services.

Participants:

- Suggestions can come from all current Housing Authority staff.
- Suggestions can come from an individual or a group (groups will share any monetary award).

The Awards:

- **Honorable Mention** — Suggestion is not adopted but has merit or the suggestion is already under consideration by the department or the Housing Authority
- **Level 1** — Suggestion is adopted but no measurable savings in time or money results.
 - Award = Certificate of Merit
 - Two Certificates of Merit = \$35 cash award
- **Level 2** — Suggestion is adopted and results in some time or cost savings or cost avoidance
 - Award = Certificate of Merit and \$100 cash award
- **Level 3** — Suggestions are adopted and make a significant impact in efficiency or effectiveness and may result in measurable savings or cost avoidance.
 - Awards = Certificate of Merit and minimum of \$150 cash award or 10% of yearly savings up to maximum of \$1,500.

Submission:

Suggestions are made by filling out the suggestion form. Suggestions may be submitted anonymously (there will be no monetary award). Members of the Employee Suggestion Committee will be available to assist in writing up suggestions, if requested.

Suggestions will not be considered:

- ☐ if they contain no recommendations for improvement or problem solution
- ☐ have been specifically assigned to the employee for problem analysis and solution
- ☐ concern a change you can make without approval from another source
- ☐ concern a personnel grievance or complaint
- ☐ deal with a salary issue

All suggestions will be considered on the basis of feasibility, benefit to the department, and impact on the department, budget impact and policy conflicts.

The Employee Suggestion Program committee is headed by the CEO and persons appointed by the CEO.

DISCIPLINE PHILOSOPHY 5.1

The Avon Park Housing Authority uses progressive discipline to ensure its staff members comply with performance standards and accepted conduct. Progressive discipline is a tool that allows the organization to help staff members correct behavior that is unacceptable. The intent of progressive discipline is to be corrective and constructive rather than punitive. Any Housing Authority employee may be disciplined for proper cause.

Staff members who do not meet standards of conduct may be disciplined at several levels. These include oral and written warnings, disciplinary probation, suspension and termination.

The Avon Park Housing Authority's intent is that discipline be administered fairly and only for cause. It is the policy of the Housing Authority to provide a well-defined system of discipline and guidelines for disciplinary actions which will be applied to all employees equitably and impartially.

However, not all offenses require progressive discipline, and the Housing Authority reserves the right to terminate staff members for committing serious infractions, without regard to progressive discipline.

STANDARDS OF CONDUCT 5.2

The following standards of conduct are general statements of conduct expected of all staff members at the Avon Park Housing Authority. This is not an all-inclusive list. Warnings will usually be given for rule violations. Flagrant or serious violations will be cause for disciplinary action, including suspension or dismissal, with or without warning.

The following conduct is not allowed and may be the basis for disciplinary action or dismissal:

- leaving work before proper time to do so, failure to be at work station at starting time, failure to remain on the job until quitting time, or conducting personal business during the normal work shift.
- indulging in "horse-play" or practical jokes.
- smoking or the use of tobacco on Avon Park Housing Authority premises outside of designated areas.
- failure to report any work-related injury or illness to a supervisor.
- repeated unexcused absence or tardiness. (Staff members who are ill or otherwise unable to report for work on their scheduled work shift, must call and notify their supervisor. Failure to call or notify a supervisor will result in an unexcused absence. Three consecutive unexcused absences may be grounds for termination.)

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- obscene, abusive or threatening language, or spreading libel or damaging rumors.
- stealing or improperly appropriating Housing Authority or staff members' funds, goods or property.
- falsifying information on expense sheets.
- reporting for work under the influence of alcohol or drugs other than those drugs prescribed by a physician.
- deliberate destruction of or damage to Housing Authority property or property belonging to others.
- insubordination.
- deliberate disclosure of Housing Authority or client confidential business.
- ~~bringing weapons of any kind onto Housing Authority property.~~
- violation of Housing Authority policies on discrimination or harassment.
- assaulting another staff member or Housing Authority client.

The Avon Park Housing Authority reserves the right to impose disciplinary action, including termination, on any staff member who engages in any conduct or omits any duty or who becomes involved in any activity which, in the Housing Authority's sole discretion, is so improper or unbecoming as to undermine the staff member's ability to effectively discharge the duties and responsibilities of the staff member's position.

CONDUCT STATEMENT

As a staff member of the Avon Park Housing Authority, I have certain responsibilities to fellow staff members, to the Housing Authority and those it serves. These responsibilities are basic to the smooth operation of any successful organization. I have read the standards of conduct statement and my signature below indicates that I understand it, and agree to comply with those standards.

Signature

Date

(signed copy to be placed in employee personnel file)

PROGRESSIVE DISCIPLINE 5.3

Progressive discipline means that, with respect to most disciplinary problems, these steps will normally be followed:

- First offense - verbal warning
- Repeated offense(s) - written warning
- Repeated offense(s) - suspension
- Repeated offense(s) - termination of employment

Oral and written warnings are the first two steps in the Avon Park Housing Authority's progressive discipline policy. Supervisors will document both on an Employee Warning Notice Form. The supervisor and staff member will sign all documentation of oral and written warnings which will go into the staff member's personnel file.

Oral Warning:

This may be the first formal step notifying an employee that the formal disciplinary system has begun. The CEO may verbally reprimand an employee to warn that employee about unsatisfactory work performance or misconduct.

Written Warning:

The CEO may submit a written reprimand to an employee when an oral warning has not resulted in the expected improvement, or when more severe initial action is warranted. A copy of the reprimand shall be filed in the employee's personnel file.

Suspensions:

- A disciplinary suspension for up to a period of ten (10) working days.
- A suspension for up to 30 days pending investigation of charges which, if substantiated, may result in dismissal. Such suspension may be made with pay at the direction of the CEO when it is in the best interest of the Housing Authority.

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Termination. There are 2 types:

- Termination from employment based upon unsatisfactory job performance which, at the discretion of the CEO, shall require two weeks notice or two weeks termination pay, payable at the next pay period following said termination; or
- Termination from employment based on violation of the rules outlined in this personnel policy may, at the discretion of the CEO, be made effective immediately, without notice or payment in lieu of notice.

Notice of termination shall be presented to the employee in writing with a statement of the reasons said action is being taken.

DISCIPLINARY PROBATION 5.4

An additional avenue of discipline is Disciplinary Probation. The goal of disciplinary probation is to indicate the seriousness of the staff member's performance problem, and to assist the employee to improve job performance.

Staff members may be placed on disciplinary probation by the CEO for up to a six-month period. The purpose of disciplinary probation is to give staff members time to resolve the problems that caused them to be placed on probation.

Supervisors who place a staff member on disciplinary probation will, in writing, identify the staff member's problem behavior, indicate a plan for improvement, and state the length of the probation. Supervisors will also state, in writing, the consequences the staff member may face if no progress is made within the specified disciplinary probation period.

Staff members on disciplinary probation are not eligible for salary increases.

DISMISSAL 5.5

Dismissal occurs when other disciplinary action fails to achieve improvement or when staff members commit a serious offense. Before dismissal, supervisors will ensure that all documentation regarding prior discipline has been made--that staff members have been properly notified in writing of any deficiencies in their performance, that they have been given time to correct their deficiencies, and that they were told that failure to correct deficiencies in performance may result in termination.

Some offenses warrant immediate dismissal. These offenses include, but are not limited to, the offenses listed in the Avon Park Housing Authority's standards of Conduct (Policy 5.2)

DEMOTIONS 5.6

There are two types of demotions that may be affected by the Avon Park Housing Authority.

Demotion Without Cause:

This type of demotion will not adversely affect an employee's service record and generally occurs:

- a. When a position has been abolished, reclassified or reallocated to a lower paying salary range position and the employee cannot be transferred to a position of equal pay.
- b. When an employee is promoted on a probationary basis and does not perform in the new position.
- c. When the employee requests a transfer to a position with a lower paying salary range.

An employee demoted without cause shall remain in the same salary regardless of grade. The salary shall be frozen until such time as the salary administration procedures warrant re-evaluation or movement.

Demotion With Cause:

This type of demotion does affect an employee's service record and generally occurs when an employee not on any probationary status has been found unsuited for that employee's present position, but may be expected to give satisfactory service in a lower paying position.

The employee shall remain at the same salary regardless of grade. The salary shall be frozen until such time as the salary administration procedures warrant re-evaluation or movement.

GRIEVANCES 5.7

The Avon Park Housing Authority recognizes that staff members will have complaints concerning disciplinary action, termination, demotion, denial of promotion or salary increase, layoff, or complaints about discrimination on the basis of a protected category, such as race, age, disability, etc. It is the policy of the Authority that employees should have an opportunity to present their work-related complaints and to appeal management decisions through a dispute resolution or grievance procedure. The Authority will attempt to resolve promptly all grievances that are appropriate for consideration under this policy.

Staff members are encouraged to resolve any problems informally with their immediate supervisor. If a solution cannot be reached, staff members may file a formal grievance, in writing to the CEO.

Staff members filing a grievance will not be discriminated against, harassed, intimidated, or face any reprisal as a result of filing a grievance, or participating in the investigation of a grievance. Staff members, who feel that they have been subject to any of the above, may appeal directly to the CEO.

Grievance Procedure

Step 1: Prior to the initiation of a written grievance, the matter shall be discussed informally with the employee's immediate supervisor within fourteen (14) days of the date of the act or omission or the date the employee becomes aware of the act or omission. Conclusion of Step 1 shall be documented by a dated memorandum from the immediate supervisor to the employee.

Step 2: If not satisfied with the immediate supervisor's response, the employee may file a written grievance with the CEO. If the immediate supervisor of the employee is the CEO proceed to Step 3.

The written grievance must be submitted to the CEO no later than 10 days after the employee is notified of the Step 1 decision. A grievance shall include a description of the following:

- a. Circumstances giving rise to the grievance.
- b. The adverse effect on, or unfairness to, the employee.
- c. The relief sought.
- d. The immediate supervisor's response.

The CEO shall review the grievance, confer with the employee and others involved, and respond within ten (10) days explaining the decision and proposed action. The grievance procedure shall end at this step.

Step 3. If the employee's immediate supervisor is the CEO, the employee shall be notified of the right to an appeal to the Board of Commissioners. The aggrieved employee must submit a written grievance to the Chairman of the Board of Commissioners no later than ten (10) days after the employee is notified of the Step 2 decision. A grievance shall include a description of the following:

- a. Circumstances giving rise to the grievance.
- b. The adverse effect on, or unfairness to, the employee.
- c. The relief sought.
- d. The CEO's response.

The Board of Commissioners shall review the grievance, confer with the employee and others involved, and respond within ten (10) days explaining the Board's decision and proposed action. The grievance procedure shall terminate upon submittal of the Board's decision.

Time Limits

A grievance shall proceed within the prescribed time limits unless there is an extension of time by mutual consent between the employee and the Authority. If the employee exceeds any time limit, the grievance shall be deemed resolved upon the basis of the prior managerial response. If the Authority exceeds any time limit, the grievance shall be automatically referred to the next step in the procedure.

Grievance Resolution

Resolution of a grievance at any step of the procedure shall be final and binding on the Authority and the employee.

Employee Representative

The employee shall have the right to consult with, and be assisted by, a representative during all steps of the grievance procedures. The employee is entitled to be released from work for appearances required by the grievance procedures. Any expenses incurred by the employee in the retention of representation shall be the expense of the employee.

Appeals Policy

At the Board's option, the Authority Board may establish additional personnel action appeals procedures supplemental to the stated Grievance Procedure in order to accommodate certain legal accommodations & requirements. Such hearings shall be conducted by the Board, or a Grievance Committee appointed by the Board Chairperson and may include but not limited to appeals in the below referenced sections:

- Discrimination
- Disciplinary Action, including Name Clearing hearings
- Grievance
- Medical & Military Termination

ABANDONMENT OF JOB 5.8

A staff member who is absent from the job for three consecutive days without first notifying a supervisor, or who has three consecutive days of unexcused absences, will be considered to have resigned the job.

RESIGNATION 5.9

The Avon Park Housing Authority expects staff members who voluntarily resign from their positions to give notice to their supervisor, in writing, of their intent to resign at least two weeks in advance of leaving. Managers and supervisors are asked to give a four-week written notice of intent to resign.

EXIT INTERVIEW 5.10

The Avon Park Housing Authority will ask staff members who voluntarily leave its employment to participate in an exit interview. The purpose of the exit interview is to discuss the staff member's reasons for leaving and other impressions the staff member may have about the Housing Authority.

All information from an exit interview will be kept in strict confidence, and will in no way affect any reference information that the Housing Authority will provide another employer about the departing staff member

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THE AVON PARK HOUSING AUTHORITY AUTHORIZATION FOR BACKGROUND CHECK

(Please read and sign this form in the space below. Your written authorization is necessary for completion of the application process.)

I, _____, hereby authorize the Avon Park Housing Authority to investigate my background and qualifications for purposes of evaluating whether I am qualified for the position for which I am applying. I understand that the Avon Park Housing Authority may utilize an outside firm or firms to assist it in checking such information, and I specifically authorize such an investigation by information services and outside entities of the agency's choice.

I am aware that AVON PARK HOUSING AUTHORITY may conduct a records check for criminal, child and dependent adult abuse in this and other states.

I also understand that I may withhold my permission and that in such a case, no investigation will be done, and my application for employment will not be processed further.

_____ Signature of Employee	_____ Date
_____ Employee's Name - Printed	
Position _____	

**AUTHORIZATION FOR PRIOR EMPLOYER TO RELEASE INFORMATION TO THE
AVON PARK HOUSING AUTHORITY**

(Please read the following statements, sign below and return to the Comptroller).

I, _____, hereby authorize my prior employer,

_____ to release any and all information relating to my employment with them to the Avon Park Housing Authority. I further release and hold harmless both _____, and The Avon Park Housing Authority from any and all liability that may potentially result from the release and/or use of such information. I understand that such information released by my prior employer will be held in strictest confidence, that it will be viewed only by those involved in the hiring decision, and that neither I nor anyone else not be involved will have the right to see the information.

I also understand that I may refuse to sign this authorization and therefore the Avon Park Housing Authority would have the legal right to refuse to consider that person any further for hiring.

Signature of Employee

Date

Employee's Name – Printed

EMPLOYMENT ACKNOWLEDGMENT FUNDING AVAILABILITY

I hereby acknowledge that upon accepting employment with the Avon Park Housing Authority, I was fully advised regarding the dependence upon Federal or State funding of my position. I am aware that termination of funding from any source may necessitate abrupt termination of my employment. I none-the-less do desire and solicit employment by the Housing Authority. I have been advised that this position is temporary and may end at any time.

Employee signature

Date

**THE AVON PARK HOUSING AUTHORITY DISCRIMINATION COMPLAINT
PROCESSING FORM**

The Avon Park Housing Authority shall not discriminate against anyone on the basis of race, creed, color, national origin, ancestry, age, sex, marital status, religion, sexual preference, veteran status, rehabilitated offender status, or disability. Any person who believes he/she has experienced discrimination on the basis of being a member of any of the listed classes of people may file a discrimination complaint. Please complete this form and return it to the Comptroller or CEO as appropriate. Your complaint will be investigated with the information kept as confidential as possible.

Name _____ Date _____

Address _____

Job title _____ Department _____

Name of immediate supervisor _____

Telephone (Home) _____ (Work) _____

If assistance in communication is required, list designated alternative contact person.

Name _____ Phone _____

Address _____

On what basis are you claiming discrimination?

- | | | |
|--|--|--|
| <input type="checkbox"/> race | <input type="checkbox"/> national origin | <input type="checkbox"/> religion |
| <input type="checkbox"/> creed | <input type="checkbox"/> ancestry | <input type="checkbox"/> disability |
| <input type="checkbox"/> color | <input type="checkbox"/> age | <input type="checkbox"/> sexual preference |
| <input type="checkbox"/> sex | <input type="checkbox"/> marital status | <input type="checkbox"/> veteran status |
| <input type="checkbox"/> rehabilitated offender status | | <input type="checkbox"/> other |

What happened? (objectively state details) _____

Who was involved? (include witnesses) _____

Where did it take place? _____

When did it take place? (date and time) _____

Why do you think this situation constitutes discrimination?

What is the remedy you are seeking?

Please list the names of anyone you feel should be interviewed in the process of the investigation that could provide useful information. _____

Have you filed a discrimination complaint with: The State Division on Civil Rights?

☐ Yes

☐ No

United States Equal Employment Opportunity Commission?

☐ Yes

☐ No

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I certify that the foregoing statements made by me are true. I am aware that if any of the foregoing statements made by me are willfully false, I am subject to punishment.

Complainant signature

Date

SEXUAL HARASSMENT COMPLAINT FORM

If you feel that you have been a victim of sexual harassment at THE AVON PARK HOUSING AUTHORITY, complete this form and return it to your immediate supervisor, CEO, or board member according to the accompanying policy on sexual harassment.

Name

Date

Title

Department / Site

1. Who was involved in the sexual harassment? Please be specific.

2. Describe the sexual harassment, i.e., date, time, location, setting?

3. What was your reaction to the incident?

4. Were there any witnesses? Who? _____

5. Have there been prior incidents involving the same person? If the answer is yes, please describe by answering the above questions.

I understand that by filing this complaint, an investigation will be conducted, and I agree to be interviewed. I also understand that during or after the investigation the nature of my complaint, along with my personal identity, may be made known to the person or persons I charge with sexual harassment.

Signature: _____ Date: _____
(For administrative use only)

Date received: _____

Investigator assigned to complaint: _____

Complaint reviewed by CEO: _____

RECORD OF PARTICIPANT ACCIDENT/INJURY

Participant's name: _____

Telephone number: _____

Social Security number: _____ Age _____

REPORT OF INCIDENT

Describe in detail what happened, time of incident, extent of injury (if any), cause of incident, where incident occurred, any contributing factors, and list all witnesses.

Was medical treatment necessary? Yes _____ No _____

If yes, give name and address of doctor and/or hospital:

 Name of person completing report: _____
 Signature of CEO: _____
 (Please forward this form to administration office immediately.)

THE AVON PARK HOUSING AUTHORITY INCIDENT/ACCIDENT REPORT
FORM

Name of client _____ Name of program _____
 Date of incident/accident _____
 Time of incident/accident _____ a.m./p.m.

Contacting requirement: (include name, date & time, staff initials)
 THE AVON PARK HOUSING AUTHORITY administration:

 Guardian:

 Parent/family: _____

Location of incident/accident: _____

Names of witness/others involved: _____

Describe incident/accident: (include antecedents, if necessary) _____

Follow-up/corrective/preventative/investigation: _____ _____ _____		
Person reporting: _____		
Manager _____ <div style="display: flex; justify-content: space-between; width: 100%;"> Signature Date </div> THE AVON PARK HOUSING AUTHORITY program director/designee:		
<div style="display: flex; justify-content: space-between; width: 100%;"> Signature Date </div> Insurance company notification: (include name & date) _____ _____ _____		
Program director forwarded copies to: (check and date as appropriate) THE AVON PARK HOUSING AUTHORITY office _____ Insurance Co.		
(Continuation of THE AVON PARK HOUSING AUTHORITY Incident/ Accident Report form)		
If this is an employee injury/accident report, also include the following information:		
Employee's full name: _____		
<div style="display: flex; justify-content: space-between; width: 100%;"> (First) (Middle) (Last) </div>		
Social Security #: _____		
Date of birth: _____ Age: _____ Sex: _____		
Home address: _____		
Home phone #: _____		
Employee's job title: _____		
Number of hours worked in a typical workday: _____		
Amount of salary/hourly wage: _____		

Where accident occurred: _____

If the employee went to the doctor, please list name and address of doctor: _____

Name and address of hospital: _____

Was the employee hospitalized? _____

Did he/she miss work as a result of the accident? _____

(Please forward this form to administration office immediately.)

ACCIDENT REPORT FORM

Accident date: _____ Time: _____

Location of accident: _____

Description of accident: _____

Name of police officer: _____

Department police officer is from: _____

Violation(s): _____

Name of employee driving: _____

Vehicle employee was driving (make, model, year, color, VIN#, license #-state): _____

NAME OF OTHER DRIVER #1: _____

Address of other driver: _____

Home phone number of driver : (____) _____ Work phone : (____) _____

Driver's license number of driver: _____

Name of owner of vehicle: _____

Address of owner of vehicle: _____

Home phone number of owner : (____) _____ Work phone : (____) _____

Description of vehicle (make, model, year, color, VID#, license #/state): _____

INSURANCE COMPANY INFORMATION FROM OTHER DRIVER #1:

Name of insurance company: _____

Name of insurance agent: _____

Phone number : (____) _____ Policy #: _____

(Continuation of Accident Report form)

NAME OF OTHER DRIVER #2: _____

Address of other driver: _____

Home phone number of driver : (____) _____ Work phone : (____) _____

Driver's license number of driver: _____

State: _____

Name of owner of vehicle: _____

Address of owner of vehicle: _____

Home phone number of owner : (____) _____ Work phone : (____) _____

Description of vehicle (make, model, year, color, VID#, license #/state): _____

INSURANCE COMPANY INFORMATION FROM OTHER DRIVER #2:

Name of insurance company: _____

Name of insurance agent: _____

Phone number : (____) _____ Policy #: _____

If additional drivers were involved, complete the same information on a separate page.

PASSENGER INFORMATION - In vehicle driven by employee:

Name	Address	Phone #	Injured
1) _____	_____	_____	yes/no
2) _____	_____	_____	yes/no
3) _____	_____	_____	yes/no
4) _____	_____	_____	yes/no
5) _____	_____	_____	yes/no
6) _____	_____	_____	yes/no
Indicate below, if injured, passenger #, type of injury, and facility name and date where medical treatment was sought (include yourself): _____			

(Continuation of Accident Report form)

PASSENGER INFORMATION - In vehicle driven by other driver:

Name	Address	Phone #	Injured
1) _____	_____	_____	yes/no
2) _____	_____	_____	yes/no
3) _____	_____	_____	yes/no
Indicate below, if injured, passenger #, type of injury, and facility name and date where medical treatment was sought (include driver): _____			

OTHERS INJURED: (example; pedestrians at crosswalks, etc.)

	Name	Address	Phone #	Type of injury
1)				
2)				

LIST OF WITNESSES:

	Name	Address	Phone #
1)			
2)			
3)			
4)			

Staff member's signature

Date

(After completing this form, please submit this report to the CEO.)

CHANGE OF PERSONAL INFORMATION

Name: _____
(Please use name currently on personnel records)

Social security #: _____ Department: _____

Effective date of change(s): _____

☐ Name change

New name: _____
(Please Print)

☐ Address change

New address: _____
City, state, zip: _____

New phone numbers :(____) _____ E-mail address: _____													
<input type="checkbox"/> Emergency contact information (change/update) Emergency contact: _____ Relationship: _____ Phone numbers :(____) _____													
Do the above changes necessitate the following? <table border="0"> <tr> <td>Yes</td> <td>No</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Change of beneficiary on life insurance.</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Add dependents to medical/dental insurance.</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Other: _____</td> </tr> </table>		Yes	No		<input type="checkbox"/>	<input type="checkbox"/>	Change of beneficiary on life insurance.	<input type="checkbox"/>	<input type="checkbox"/>	Add dependents to medical/dental insurance.	<input type="checkbox"/>	<input type="checkbox"/>	Other: _____
Yes	No												
<input type="checkbox"/>	<input type="checkbox"/>	Change of beneficiary on life insurance.											
<input type="checkbox"/>	<input type="checkbox"/>	Add dependents to medical/dental insurance.											
<input type="checkbox"/>	<input type="checkbox"/>	Other: _____											
The following section for Human Resources use only:													
Notification: <input type="checkbox"/> Payroll <input type="checkbox"/> Personnel file <input type="checkbox"/> Insurance (medical/dental) <input type="checkbox"/> Retirement Plan													
<u>TRIP REQUEST FORM</u>													
Name _____ Date _____													
Conference _____													
Location _____													
Date of conference _____													
* Estimate of cost: \$ _____													
Brief description of conference: _____ _____ _____ _____													
Manager's comments: _____													

<p>I have read and understand the employee expense account policy.</p>	
<p>_____ Employee signature</p>	<p>_____ Date</p>
<p>_____ Supervisor</p>	<p>_____ Date</p>
<p>_____ CEO</p>	<p>_____ Date</p>

* Each employee must complete a Travel Advance Request form to estimate expenses. **See form on following page.**

<p><u>TRAVEL ADVANCE REQUEST</u></p>	
<p>Name _____</p>	<p>Date _____</p>
<p>Conference _____</p>	
<p style="text-align: right;">Registration costs</p>	<p>\$ _____</p>
<p style="text-align: right;">Air fare</p>	<p>\$ _____</p>
<p>Ground transportation (Rental Car/Taxi)</p>	<p>\$ _____</p>
<p style="text-align: right;">Hotel (# of Days/Daily Rate)</p>	<p>\$ _____</p>
<p style="text-align: right;">Meals (# of Days x \$____.00)</p>	<p>\$ _____</p>
<p style="text-align: right;">Total Cost</p>	<p>\$ _____</p>
<p>Receipts for expenses must be attached to expense statement.</p>	

Employee _____	Date _____
Supervisor _____	Date _____
CEO _____	Date _____
Accounting Use Only	
Date paid _____	Check # _____

VOLUNTEER APPLICATION FORM

Name _____ Date _____

Address _____

Home phone _____ Work phone _____

Name/phone # of person to call in case of emergency _____

Please answer the following questions in the space provided:

1. Have you done volunteer work at another nonprofit? If so, where was it, and what type of work did you do?

2. What kind of work would you like to do at THE AVON PARK HOUSING AUTHORITY?

3. Please list your hobbies or outside interests:

4. Why do you want to volunteer at THE AVON PARK HOUSING AUTHORITY?

5. Please list the names and phone numbers of three references:

1) _____

2) _____

3) _____

6. Are you available to volunteer on weekends or evenings?

Signature _____ Date _____

APPROVAL FOR OVERTIME

[for supervisors to complete]

I authorize _____ to work the estimated overtime as specified below. (This form will be completed and submitted to the CEO.)

Date _____ Estimated hours of overtime _____

Supervisor's reason for overtime: _____

Staff member's signature Date

Supervisor's signature Date

COMP TIME RECORD

Employee name _____

Month/Year _____

Date Accrued	Description	Hours	Date Used	Hours
Total Accrued:			Total Used:	

COMP TIME REQUEST

Employee name: _____

Date(s) requested: _____

Approved by:

Supervisor Date

CEO Date

MEDICAL LEAVE OF ABSENCE REQUEST

Employee _____

Position _____ Date Employed _____

I request leave of absence beginning _____ and continuing until
approximately _____ because of _____

1. Cause of disability (describe sickness/injury) _____

2. If due to an accident, how did it occur? _____

When? _____

Where? _____

3. Name and address of physician first consulted for this condition:

4. Date physician first consulted: _____

I authorize my physician(s) to release any information acquired in the course of any examination and/or treatment.

Signature _____

Date _____

(For Medical, Maternity, Jury, Bereavement and Military Leave)

Signature _____

Date _____

Approved by: _____ Date _____

EMPLOYEE COMPLAINT FORM

Name: _____

Title: _____

Department: _____

Supervisor: _____

Nature of Complaint: _____

Describe the situation(s) which occurred or are currently occurring which prompted you to submit this complaint:

I have discussed my complaint with my supervisor: _____ Yes _____ No

Date of first interview: _____

Date of last interview: _____

How do you think the situation can be resolved?

Signature of Complainant _____ Date _____

EMPLOYEE WARNING NOTICE

☐ Oral ☐ Written

PLEASE PRINT

Date of warning _____

Employee name _____

Work site _____ Position _____

Type of Violation:

- | | | |
|--|---|--|
| <input type="checkbox"/> Attendance | <input type="checkbox"/> Carelessness | <input type="checkbox"/> Insubordination |
| <input type="checkbox"/> Lateness or early quit | <input type="checkbox"/> Failure to follow instructions | <input type="checkbox"/> Violation of safety rules |
| <input type="checkbox"/> Rudeness to employees or customers | <input type="checkbox"/> Working on personal matters | <input type="checkbox"/> Willful damage to equipment |
| <input type="checkbox"/> Violation of THE AVON PARK HOUSING AUTHORITY policies or procedures | <input type="checkbox"/> Unsatisfactory work quality | |
| <input type="checkbox"/> Other | | |

Have there been any previous warnings of this type? ☐ Yes ☐ No (If no, skip to next section)

	Type of previous warning	Date	By whom
1st Warning	<input type="checkbox"/> Oral <input type="checkbox"/> Written		
2nd Warning	<input type="checkbox"/> Oral <input type="checkbox"/> Written		

Employer Statement

Date of incident ____/____/____ Time ____:____ a.m. /p.m.

Employee Statement (optional)

- ☐ I agree with my employer's statement.
☐ I disagree with my employer's description of violation for these reasons:

Employee signature _____ Date _____

Consequence if incident occurs again:

- ☐ Written Warning ☐ Suspension ☐ Dismissal ☐ Other

Expectations:

This employee warning notice was reviewed with me.

Signature of employee _____ Date _____

Signature of supervisor who issued warning _____ Date _____

**THE AVON PARK HOUSING AUTHORITY STAFF MEMBER PLAN OF
IMPROVEMENT**

Name of staff member: _____

Workplace: _____ Job title: _____

Nature of incident: (Supervisor must fill in exact details)

Supervisor's comments: _____

--

Staff member's comments: _____

--

Goals to improve: _____

Action to be taken:

- ☐ Oral warning
- ☐ Written warning
- ☐ Disciplinary probation
- ☐ Disciplinary suspension
- ☐ Dismissal

I have read this report and understand it.

Signature of staff member

Signature of supervisor

Signature of witness

Date

**If a witness is present, the witness must be a staff person of equal or higher authority.

THE AVON PARK HOUSING AUTHORITY EMPLOYMENT SEPARATION
MEMORANDUM

In addition to the termination policy contained in the Avon Park Housing Authority Personnel Policies and Procedures Handbook, upon separation from the Housing Authority, the following must be returned or submitted to your supervisor:

- office key(s)
- Avon Park Housing Authority credit card
- equipment (see Exit Interview Checklist on the following page)

- _____
• COBRA benefit forms (optional)_____

- _____
• forwarding address information_____

- _____
• other (list)_____

Failure to comply with this memo may affect the timing and/or payment of eligible remuneration/benefits.

I hereby certify that the above noted items have been returned or submitted to the Avon Park Housing Authority..

Employee signature

Date

Employee name (please print)

Avon Park Housing Authority representative signature Date

EXIT INTERVIEW CHECKLIST

Name of employee: _____ Date: _____

Dates of employment: From _____ To _____

Salary hourly rate: _____

TO BE COMPLETED BY EMPLOYEE (If additional space is needed, use other side of form)

Reason for leaving: _____

What did you like and dislike about this organization? _____

Were you treated fairly? If no, please explain: _____

What suggestions could you offer to make this a better place to work? _____

<p>1. To be obtained from employee, if applicable:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border-bottom: 1px solid black;">_____ keys to building (s)</td> <td style="width: 50%; border-bottom: 1px solid black;">_____ resignation statement</td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____ issued equipment</td> <td></td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____ new address & phone number</td> <td style="border-bottom: 1px solid black;">_____ current voice mail</td> </tr> </table> <p>2. To be discussed:</p> <table style="width: 100%; border: none;"> <tr> <td style="border-bottom: 1px solid black;">_____ extended medical coverage insurance plan (for COBRA requirements)</td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____ retirement plan</td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____ life insurance</td> </tr> <tr> <td style="border-bottom: 1px solid black;">_____ other _____</td> </tr> </table> <p>I do _____ / do not _____ give permission to release information regarding my employment with this organization.</p> <p style="text-align: center;">_____</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border-bottom: 1px solid black;">Signature of employee</td> <td style="width: 50%; border-bottom: 1px solid black;">Date</td> </tr> </table>		_____ keys to building (s)	_____ resignation statement	_____ issued equipment		_____ new address & phone number	_____ current voice mail	_____ extended medical coverage insurance plan (for COBRA requirements)	_____ retirement plan	_____ life insurance	_____ other _____	Signature of employee	Date
_____ keys to building (s)	_____ resignation statement												
_____ issued equipment													
_____ new address & phone number	_____ current voice mail												
_____ extended medical coverage insurance plan (for COBRA requirements)													
_____ retirement plan													
_____ life insurance													
_____ other _____													
Signature of employee	Date												
<p>To Be Completed by Supervisor</p> <p>Work habits: _____</p> <p>Ability: _____</p> <p>Conduct: _____</p> <p>Attendance: _____</p>													
<p>Did the employee suffer any injuries while employed?</p> <p>Would you re-employ? _____ If not, why? _____</p> <p>_____</p> <p>_____</p> <p>Remarks: _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border-bottom: 1px solid black;">Signature</td> <td style="width: 50%; border-bottom: 1px solid black;">Title</td> </tr> </table>		Signature	Title										
Signature	Title												

CEO

**REVISIONS TO THE AVON PARK HOUSING AUTHORITY
HANDBOOK**

Filing instructions:		
Remove pages	Insert	Reason for change
Complete Revision		
PERSONNEL POLICY RE-Write		Update for State & Fed. Reg.Changes
Board Adoption:_____		(date:_____) Resolution #_____

**AVON PARK HOUSING AUTHORITY
BOARD OF COMMISSIONERS
GRIEVANCE COMMITTEE PROCEDURE AND STRUCTURE**

In order to provide for an effective method for APHA employees to officially grieve a personnel action taken by the CEO (when the CEO is the immediate supervisor), it is appropriate to develop a structure and procedure for such a grievance to be heard, as well as the process to conclude the grievance in as efficient a manner as is possible. Thus, the following outlines a straight forward structure to process this category of grievance action:

1) **TIME LIMIT FOR SUBMITTAL OF APPEAL OF PERSONNEL ACTION**

When an APHA employee wishes to file a grievance contesting a personnel action of the APHA CEO, when the APHA CEO is the immediate supervisor, a written request for an Appeal of the Personnel Action shall be filed with the Chairperson of the APHA Board of Commissioners within ten (10) calendar days of the date of the written disciplinary notice to this employee.

Failure to submit an Appeal within the ten (10) day period will preclude and terminate any right to appeal provided pursuant to this procedure.

2) **STRUCTURE OF THE GRIEVANCE COMMITTEE**

The Grievance Committee for this category of personnel action appeal shall consist of no less than three (3) members of the APHA Board of Commissioners, who shall have a Chair selected by the Chairperson of the APHA Board of Commissioners.

3) **RULE OF PROCEDURE/EVIDENCE**

Generally, the Florida Rules of Civil Procedure shall not apply to these proceedings. It is appropriate, however, that all matters brought before the Committee be relevant and material to the personnel action before the Committee. Enforcement of the proceedings will be by the Committee Chair, and generally accepted due process standards shall be the basis for determining what may or may not be appropriate for presentation to the Committee.

4) **WITNESSES**

It should be the general rule of the committee that there should be a limit as to the number of witnesses each party is allowed. Unless stipulated to by the parties, or for good cause shown, no more than three (3) witnesses shall be allowed per party.

5) **TIME LIMIT**

The proceedings should be limited to no more than three (3) hours, until each side allotted one (1) hour for case presentation and up to one-half (1/2) hour each for questions/inquiry by the Committee. The Committee, for good cause shown or by stipulation of the parties, may further expand or limit the time frame allotted for the Appeal, in its sole discretion.

6) **SUBMISSION OF WRITTEN SUMMARIES**

Each party may submit to the Committee, prior to the scheduled hearing, a written summary of their respective position and why they conclude that the agency action should be upheld or denied. The summary shall be no longer than two (2) letter sized pages.

7) **EX PARTE COMMUNICATION**

All parties, their attorneys and/or witnesses, should be prohibited from any communications, directly or indirectly, with the members of the Committee on the subject matter associated with the personnel action, outside the presence of the opposing party. Any violation of this policy should be enforced by removal of the Commissioner, discharge of the Appeal or rejection of the CEO's personnel action, at the discretion of the Committee.

8) **COMMITTEE DECISION**

At the conclusion of the Appeal hearing, the Committee shall be empowered to either uphold the Authority action and sustain the personnel action, or reject the Authority action and uphold the Appeal. The decision shall be by majority vote and should be categorized as final agency action.