



MONDAY, JUNE 17, 2013

REGULAR BOARD MEETING

Legal Counsel

AGENDA

The Regular Meeting The Housing Authority of the City of Lakeland, Florida

Monday, June 17, 2013 @ 6:00 PM

The Manor At Renaissance
150 W. 14th Street, Lakeland, Florida

Pledge of Allegiance

1. Moment of Silence
2. Establish a Quorum
3. Open Lakeland Housing Authority Regular Meeting
4. Public Forum
5. Approval of the Minutes of the Annual Board meeting held on May 20, 2013 (Tab 1)
6. Old Business
7. **New Business** (Tab 2)

Monthly Reports

- A. Financial Reports
- B. Grants Update
- C. Development Report
- D. Legal Report
- E. Resolution # 13-1354 Request for Approving Authorization for Executive Director to enter into Contract with EMG to provide Green Physical Needs Assessment Services
8. Secretary's Reports including Procurement, Residents Services and Family Self-Sufficiency, Housing Management Board Report which includes Housing Choice Voucher Program, Property Management, and Investigations Report (Tab 3)
9. Other Business
10. Adjournment

MINUTES
Regular Board Meeting of
The Housing Authority of the City of Lakeland
May 20, 2013

The Commissioners of the Housing Authority of the City of Lakeland met for a Regular Board Meeting on Monday, May 20th at 6:00 p.m. at the Lakeland Housing Authority, 430 Hartsell Avenue, Lakeland, Florida.

LHA Board Members Present: Michael Pimentel, Chairman
 Rev. Richard Richardson, Vice Chair
 Edward Hall, Commissioner
 Joseph DiCesare, Commissioner
 Dr. Bernice Evans, Commissioner
 Ellis Hirsch, Commissioner

LHA Board Member Absent: Dorothy Sanders, Commissioner (Hospitalized)

LHA Staff Present: Benjamin Stevenson, Executive Director
 Valerie Brown, Sr. Director of Development
 Earl Haynes, Director of Resident Services
 Carlos Pizarro, Director of Housing
 Tom Hornack, Procurement
 Shauna Ginn, Asset Manager
 Eva Hall, Director of Finance
 Kasandra S. Davis, Assistant Director of Housing
 Patrick Roberts, Human Resources
 Idalia Gonzalez, Section 8 Department
 Brenda Goodman, Executive Administrative Coordinator

Guests: Jenny Lopez Lillie Brown
 Nita McGee Larry Mitchell
 Mariela Olivo-Ortiz Christell Graham
 Dionna Watson Pierce Calixle
 Don Brown

The Meeting was called to order at 6:04 p.m. by Michael Pimentel.

Pledge of Allegiance and a moment of silence observed.

A quorum was established.

Election of Officers

Attorney Ricardo Gilmore opened with the process of voting for officers, including the procedure by which nominations and the election should occur. Attorney Gilmore explained that an earlier election was necessitated because the Chairman and 1st Vice Chairman were no longer on the board. He advised the board that to comply with the Annual Meeting an election process must be held..

Attorney Gilmore requested nominations for the position of Chairman of The Board.

Nomination for Chairman of the Board of Commissioners: Michael Pimentel. Richardson – 2nd Hirsch. The nomination closed on said name by acclamation.

Attorney Gilmore requested nominations for position of 1st Vice - Chairman.

Nominations for 1st Vice-Chairman of the Board of Commissioners: Rev. Richard Richardson. Pimentel – 2nd Hall Attorney Gilmore declared the nomination closed on said name by acclamation.

PUBLIC FORUM

Two guests from Lakeland Housing Authority Resident Advisory Association (LHARAA) requested to address the Board of Commissioners:

Ms. Lillie Brown, President - LHARAA
Mr. Pierre Calixle, Member - LHARAA

Based on the request of both Ms. Lillie Brown and Mr. Pierre Calixle, representatives of LHARRA, the board and Mr. Stevenson agreed to meet with LHARAA on June 3, 2013 at 6:00 PM, LHA Conference Room.

Mr. Don Brown, a public guest addressed the Board of Commissioners, he encouraged the Board of Commissioners, LHARAA and all attending the meeting of the importance of establishing “a trust level” so everyone can work together.

Family Self-Sufficiency [FSS] Graduation

There were two resident participants that completed the FSS program requirements. Commissioner Pimentel read the bio’s of the following recipients:

Maricia Olivo-Ortiz – Completed all of her goals and requirements. She is a single parent. Currently full-time employed. She received a FSS Certificate of Completion and a stipend check.

Dionna Watson – Completed all her goals and requirements. She is a single parent. A graduated from Hillsborough Community College, earning a Registered Nurse Degree. She received a FSS Certificate of Completion and a stipend check.

Approval/Acceptance of Minutes

- **Motion to approve the Minutes of the Regular Board Meeting held on April 15, 2013.**
Hirsh – 2nd Richardson.

Vote: Pimentel – Aye, Hirsch-Aye, DiCesare-Aye, Hall-Aye, Richardson-Aye,
Evans (*Stepped out the meeting and was not available for the vote*)

- **Acceptance of the Minutes of the Regular Finance Committee meeting April 15, 2013.**
- **Acceptance of the Minutes of the Personnel/Administration Committee Meeting held on April 15, 2013.**

Old Business

No Old Business

New Business

- ***Financial and Grant Reports*** – Ms. Hall gave a very thorough Financial and Grant Report pointing out significant points from the submitted information.

Yardi Updates – A Yardi representative will provide training and question and answers regarding the existing set up for LHA. This will be conducted over a 3 day period being June 10th through June 13th.

- ***Development*** – Ms. Brown gave an overview summarizing the Development Report pointing out significant points from the submitted information.

Updates on LHA Health Fair – On May 17, 2013 LHA conducted a Community Health Fair at Lake Ridge. There were participation from representatives of the Board of Commissioners: Commissioners Pimentel and Sanders were present. . The attendance from the community was very successful. Commissioner Pimentel commended the LHA staff for their 100% cooperation and participation on that day. Commissioner Pimentel stated the Health Fair was a very successful community event.

- ***Legal Report*** – Attorney Gilmore introduced a guest attending the meeting with him as Susan Decopain, who is a new attorney with his Saxon Gilmore.

Attorney Gilmore submitted his report as a hand-out of the revised By-Laws as a result of actions taken in the 4/15/2013 Regular Board meeting marked “draft and proposed” the first document is the red-line changes, the second document is the clean version of the By-Laws. Attorney Gilmore advised the board to review the handout and it will be discussed in the next meeting.

A copy of the Procurement Policy was handed out as a draft. Attorney Gilmore thoroughly explained that the board’s concerns would be what level of authority is given to the Executive Director to execute contract without prior board approval.

Resolutions

Resolution #13-1353 Request for Approving the Loan Renewal with Community Southern Bank for 4379 Williams Road, overview was presented by Ms. Brown.

Motion to Approve Resolution #13-1353 – Request for Approving the Loan Renewal with Community Southern Bank for 4379 Williams Road. Hirsch – 2nd Richardson

Vote: Commissioners DiCesare, Hirsch – Aye, Hall – Aye, Pimentel – Aye, Richardson - Aye, Evans – Aye.

Secretary Report – Submitted as written.

Other Business

Commission Hirsch suggested that a card or flowers be sent to Commissioner Sanders wishing her well during her time of physical challenges. The board all agreed.

The Board acknowledged condolences to the loss of a love one of Commissioner DiCesare.

Commissioner Pimentel recommended that the board meetings be held at the various LHA properties to insure more participation and collaboration since the Resident Interests Committee meetings has been abolished. Chairman Pimentel will coordinate a schedule of the meetings to be held at the various properties.

The next board meeting will be held at the Renaissance Senior Building, 150 W. 14th Street, Lakeland Florida at 6:00 PM.

Mr. Stevenson acknowledged that Ms. Kasandra S. Davis, is now Assistant Director of Housing, her primary duties will be working directly with property managers to improve communication with residence. As part of the process she has conducted and will continue monthly meetings with the residents and building unity within the community, plan activities, and building a sense of community with our residents.

Mr. Stevenson handed out a copy of Employment Goals that were discussed between he and Commissioner Pimentel.

The meeting was adjourned at 8:30 p.m.

Benjamin Stevenson, Secretary



TO: Lakeland Housing Authority Finance Committee

FROM: Eva Hall, LHA Director of Finance

DATE: June 5, 2013

RE: April 2013 Financial Statements

I have attached the Statements of Operations and Balance Sheets for April 2013 for the following entities:

1. Central Office Cost Center (COCC)
2. Public Housing Program (AMP 1)
3. Housing Choice Voucher Program (Section 8)
4. Dakota Park Limited Partnership, LLLP
5. Renaissance at Washington Ridge, Ltd., LLLP
6. Colton Meadow, LLLP
7. Bonnet Shores, LLLP
8. West Bartow Partnership, Ltd., LLLP

These statements are unaudited.

A handwritten signature in cursive script that reads "Eva M. Hall". The signature is written in black ink and is positioned above a solid horizontal line.

Eva M. Hall, CPA
Director of Finance
Lakeland Housing Authority

**Lakeland Housing Authority
Central Office Cost Center
Statement of Operations
For the Four Months Ended April 30, 2013**

	<u>Current Month</u>				<u>Year to Date</u>				<u>Annual Budget</u>
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
Vending Income	-	-	-	100.00%	128	-	128	100.00%	-
Management & Admin Income	20,256	18,933	1,326	7.00%	81,034	75,733	5,301	7.00%	227,200
Total Revenue	20,256	18,933	1,323	6.99%	81,162	75,733	5,429	7.17%	227,200
Administrative Expenses	68,609	93,822	(25,213)	-26.87%	325,439	393,322	(67,883)	-17.26%	1,198,000
Utility Expense	1,769	1,507	262	17.41%	6,153	6,027	126	2.09%	18,080
Maintenance Expense	3,047	1,175	1,872	159.32%	8,762	4,700	4,062	86.43% ¹	14,100
General Expenses	1,175	925	250	27.03%	7,482	3,700	3,782	102.22% ²	11,100
Depreciation	133	146	(13)	-8.80%	533	583	(50)	-8.58%	1,750
Total Expense	74,733	97,575	(22,842)	-23.41%	348,369	408,332	(59,963)	-14.68%	1,243,030
Net Operating Income (Loss)	(54,477)	(78,641)	24,164	-30.73%	(267,207)	(332,599)	65,392	-19.66%	(1,015,830)
Allocation Required from Other Programs	54,477	85,098	(30,621)	-35.98%	267,207	340,393	(73,186)	-21.50%	1,021,180
									5,350

Comments

¹ Maintenance Expense includes unplanned repairs for plumbing and irrigation.

²

General Expenses include a 25% down payment for liability insurance for 2013 made in January. Budget does not include \$2,400 annual premium for employee bond insurance. Will propose an adjustment for the next budget amendment.

**Lakeland Housing Authority
Central Office Cost Center
Balance Sheet
April 30, 2013**

Assets	Liabilities and Equity
<p>Current Assets</p> <p style="padding-left: 20px;">Prepaid Expense 11,160</p> <p>Total Current Assets 11,160</p> <p>Other Assets</p> <p style="padding-left: 20px;">Property & Equipment 22,857</p> <p style="padding-left: 20px;">Accumulated Depreciation (2,530)</p> <p>Total Other Assets 20,327</p> <p>Total Assets 31,487</p>	<p>Liabilities</p> <p>Current Liabilities</p> <p style="padding-left: 20px;">Accounts Payable 973</p> <p style="padding-left: 20px;">Due to Other Programs 374,993</p> <p style="padding-left: 20px;">Accr Compensated Absences Current 14,986</p> <p>Total Current Liabilities 390,952</p> <p>Other Liabilities</p> <p style="padding-left: 20px;">Accr Compensated Absences - LT 27,832</p> <p>Total Other Liabilities 27,832</p> <p>Total Liabilities 418,784</p> <p>Equity</p> <p style="padding-left: 20px;">Unrestricted Net Assets (387,297)</p> <p>Total Equity (387,297)</p> <p>Total Liabilities and Equity 31,487</p>

**Lakeland Housing Authority
Public Housing (AMP 1)
Statement of Operations
For the Four Months Ended April 30, 2013**

	<u>Current Month</u>				<u>Year to Date</u>				<u>Annual Budget</u>
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
Rental Income	18,642	24,500	(5,858)	-23.91%	93,489	98,000	(4,511)	-4.60%	294,000
Other Tenant Income	306	738	(432)	-58.54%	3,043	2,950	93	3.15%	8,850
Government Subsidy Income	52,046	65,092	(13,046)	-20.04%	225,840	260,366	(34,526)	-13.26%	781,098
Interest Income Restricted	9,130	20,750	(11,620)	-56.00%	36,518	83,000	(46,482)	-56.00% ¹	249,000
Other Income	388	1,316	(928)	-70.52%	1,813	5,267	(3,454)	-65.58%	15,800
Total Revenue	80,512	112,396	(31,884)	-28.37%	360,703	449,583	(88,880)	-19.77%	1,348,748
Administrative Expenses	34,980	41,898	(6,918)	-16.51%	146,385	173,102	(26,717)	-15.43%	524,818
Tenant Services Expenses	61	1,225	(1,164)	-95.02%	1,150	4,900	(3,750)	-76.53%	14,700
Utility Expense	4,424	6,958	(2,534)	-36.42%	26,723	27,833	(1,110)	-3.99%	83,500
Maintenance Expense	36,979	35,507	1,472	4.15%	99,519	148,675	(49,156)	-33.06%	452,671
General Expenses	4,396	6,056	(1,660)	-27.41%	43,416	24,223	19,193	79.23% ²	72,670
Housing Assistance Payments	2,582	2,875	(293)	-10.19%	12,354	11,500	854	7.43%	34,500
Depreciation	66,917	66,917	0	0.00%	267,667	267,667	-	0.00%	803,000
Total Expense	150,339	161,436	(11,097)	-6.87%	597,214	657,900	(60,686)	-9.22%	1,985,859
Net Operating Income (Loss)	(69,827)	(49,040)	(20,788)	42.39%	(236,511)	(208,317)	(28,194)	13.53%	(637,111)

Comments

- ¹ Interest income reduced due to receipt of principal payment from Bonnet Shores.
- ² General Expenses include a 25% down payment for liability insurance for 2013.

**Lakeland Housing Authority
Public Housing (AMP 1)
Balance Sheet
April 30, 2013**

Assets

Current Assets	
Cash - Unrestricted	520,463
Cash - Restricted	35,891
Accounts Receivable	8,886
Allowance for Doubtful Accounts	(3,356)
Due from Other Programs	4,765,253
Lakeridge Homes 3rd Mortgage	251,000
Lakeridge Homes 2nd Mortgage	52,000
Colton Meadow Mortgage	450,845
Villas at Lake Bonnet Mortgage	1,009,877
Prepaid Expense	58,952
Other Current Assets	48,309
Total Current Assets	7,198,120
Other Assets	
Property & Equipment	11,343,617
Accumulated Depreciation	(7,488,258)
Total Other Assets	3,855,359
Total Assets	11,053,479

Liabilities and Equity

Liabilities	
Current Liabilities	
Accounts Payable	2,895
Tenant Security Deposits	49,033
Accrued PILOT	19,557
Accrued Audit Fees	49,432
Tenant Prepaid Rent	3,026
Accr Compensated Absences Current	3,170
Total Current Liabilities	127,113
Other Liabilities	
Accr Compensated Absences - LT	12,453
FSS Liability	32,466
Total Other Liabilities	44,919
Total Liabilities	172,032
Equity	
Net Assets	10,881,447
Total Equity	10,881,447
Total Liabilities and Equity	11,053,479

Lakeland Housing Authority
Section 8 Housing Choice Voucher Program
Statement of Operations
For the Four Months Ended April 30, 2013

	Current Month				Year to Date				Annual Budget
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
HAP/Administrative Revenue	905,169	902,822	2,347	0.26%	3,552,491	3,549,750	2,741	0.08%	10,772,326
Other Income	39	9	29	320.07%	150	37	113	305.41%	110
Total Revenue	905,208	902,831	2,376	0.26%	3,552,641	3,549,787	2,854	0.08%	10,772,436
Administrative Expenses	61,566	63,504	(1,938)	-3.05%	249,626	269,967	(20,341)	-7.53%	807,055
Utility Expense	251	375	(124)	-33.07%	1,000	1,500	(500)	-33.33%	4,500
Maintenance Expense	759	533	226	42.40%	2,320	2,192	128	5.84%	6,452
General Expenses (Insurance, etc)	479	104	376	362.80%	833	566	267	47.17%	1,398
Housing Assistance Payments	775,221	775,079	142	0.02%	3,109,713	3,121,719	(12,006)	-0.38%	9,624,919
Depreciation	315	350	(35)	-10.00%	1,260	1,400	(140)	-10.00%	4,200
Total Expense	838,591	839,945	(1,354)	-0.16%	3,364,752	3,397,344	(32,592)	-0.96%	10,448,524
Net Operating Income (Loss)	66,617	62,887	3,730	5.93%	187,889	152,443	35,446	23.25%	323,912

Lakeland Housing Authority
Section 8 Housing Choice Voucher Program
Balance Sheet
April 30, 2013

Assets		Liabilities and Equity	
Current Assets		Liabilities	
Cash - Unrestricted	442,213	Current Liabilities	
Cash - FSS Escrow	129,720	Accr Compensated Absences	5,599
Accounts Receivable - Formal Agreements	29,681	Due to Other Program	<u>260,087</u>
Allow for Doubtful A/R	(29,681)	Total Current Liabilities	<u>265,686</u>
Prepaid Expense	15,028		
Other Current Assets	<u>31,925</u>	Other Liabilities	
Total Current Assets	<u>618,886</u>	Accr Compensated Absences - LT	10,398
		FSS Escrow Liability	<u>124,240</u>
Other Assets		Total Other Liabilities	<u>134,638</u>
Furniture & Fixtures	28,867	Total Liabilities	<u>400,324</u>
Accumulated Depreciation	<u>(9,021)</u>		
Total Other Assets	<u>19,846</u>	Equity	
		Retained Earnings - Unrestricted	<u>238,408</u>
Total Assets	<u>638,732</u>	Total Equity	<u>238,408</u>
		Total Liabilities and Equity	<u>638,732</u>

**Lakeland Housing Authority
Dakota Park Limited Partnership, LLLP
Statement of Operations
For the Four Months Ended April 30, 2013**

	Current Month				Year to Date				Annual Budget
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
Rental Income	9,392	9,196	196	2.13%	35,478	36,783	(1,305)	-3.55%	110,350
Other Tenant Income	35	430	(395)	-91.87%	920	1,722	(802)	-46.57%	5,165
Government Subsidy	5,655	7,072	(1,417)	-20.03%	24,536	28,287	(3,751)	-13.26%	84,860
Other Income	3	8	(5)	0.00%	16	32	(16)	0.00%	95
Total Revenue	15,085	16,706	(1,621)	-9.70%	60,950	66,824	(5,874)	-8.79%	200,470
Administrative Expenses	4,422	4,720	(298)	-6.31%	19,265	19,281	(16)	-0.08%	58,245
Tenant Services Expense	-	42	(42)	0.00%	-	167	(167)	0.00%	500
Utility Expense	2,230	1,520	710	46.71%	7,163	6,080	1,083	17.81%	18,240
Maintenance Expense	3,977	3,426	551	16.08%	10,886	14,078	(3,192)	-22.67%	42,611
General Expenses	725	1,905	(1,180)	-61.94%	11,633	7,619	4,014	52.68% ¹	22,856
Housing Assistance Payments	1,125	1,292	(167)	-12.93%	5,810	5,167	643	12.44%	15,500
Financing Expenses	8,200	8,163	37	0.46%	33,613	32,651	962	2.95%	97,952
Depreciation & Amortization	2,199	7,648	(5,449)	-71.25%	8,795	30,590	(21,795)	-71.25% ²	91,770
Total Expense	22,878	28,715	(5,837)	-20.33%	97,165	115,633	(18,468)	-15.97%	347,674
Net Operating Income (Loss)	(7,793)	(12,009)	4,217	-35.11%	(36,215)	(48,809)	12,594	-25.80%	(147,204)

Comments

- ¹ General Expenses include a 25% down payment for liability insurance for 2013. YTD Bad Debt Expense = \$3,441.
- ² Depreciation Expense budget is too high. Will propose change for next budget amendment.

Lakeland Housing Authority
Dakota Park Limited Partnership, LLLP
Balance Sheet
April 30, 2013

Assets	Liabilities and Equity
<p>Current Assets</p> <p style="padding-left: 20px;">Cash - Unrestricted 4,035</p> <p style="padding-left: 20px;">Cash - Restricted 90,032</p> <p style="padding-left: 20px;">Accounts Receivable - Tenants 9,483</p> <p style="padding-left: 20px;">Allow for Doubtful A/R - Tenants (5,099)</p> <p style="padding-left: 20px;">Prepaid Expense 2,949</p> <p style="padding-left: 20px;">Other Current Assets 9,221</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Current Assets 110,621</p> <p style="padding-top: 20px;">Other Assets</p> <p style="padding-left: 20px;">Property & Equipment 926,991</p> <p style="padding-left: 20px;">Accumulated Depreciation (29,763)</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">897,228</p> <p style="padding-left: 20px;">Intangible Assets 71,725</p> <p style="padding-left: 20px;">Accumulated Amortization (30,718)</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">41,007</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Other Assets 938,235</p> <p style="border-top: 1px solid black; border-bottom: 3px double black; margin-top: 20px;">Total Assets 1,048,856</p>	<p>Liabilities</p> <p style="padding-left: 20px;">Current Liabilities</p> <p style="padding-left: 40px;">Accounts Payable 3,243</p> <p style="padding-left: 40px;">Tenant Security Deposits 8,246</p> <p style="padding-left: 40px;">Accrued Audit Fees 3,533</p> <p style="padding-left: 40px;">Due to West Lake Management 73,810</p> <p style="padding-left: 40px;">Accr Compensated Absences Current 870</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Current Liabilities 89,702</p> <p style="padding-top: 20px;">Other Liabilities</p> <p style="padding-left: 40px;">Accrued Interest - HOPE VI 484,404</p> <p style="padding-left: 40px;">Accrued Developer Fee 149,860</p> <p style="padding-left: 40px;">Accr Compensated Absences - LT 1,616</p> <p style="padding-left: 40px;">FSS Escrow Liability 19,159</p> <p style="padding-left: 40px;">Due to Partner 124,954</p> <p style="padding-left: 40px;">Loan Payable - HOPE VI 714,591</p> <p style="padding-left: 40px;">Loan Payable - SunTrust 372,767</p> <p style="padding-left: 40px;">Loan Payable - LHA 101,380</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Other Liabilities 1,968,731</p> <p style="border-top: 1px solid black; border-bottom: 3px double black; margin-top: 20px;">Total Liabilities 2,058,433</p> <p style="padding-top: 20px;">Equity</p> <p style="padding-left: 20px;">Partners' Equity (1,009,577)</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Equity (1,009,577)</p> <p style="border-top: 1px solid black; border-bottom: 3px double black; margin-top: 20px;">Total Liabilities and Equity 1,048,856</p>

**Lakeland Housing Authority
Renaissance at Washington Ridge Ltd., LLLP
Statement of Operations
For the Four Months Ended April 30,2013**

	Current Month				Year to Date				Annual Budget
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
Rental Income	57,356	51,500	5,856	11.37%	225,497	206,000	19,497	9.46%	618,000
Other Tenant Income	970	1,580	(610)	-38.59%	6,339	6,318	21	0.33%	18,955
Government Subsidy	25,073	31,357	(6,284)	-20.04% ¹	108,797	125,430	(16,633)	-13.26%	376,289
Other Income	220	200	20	0.00%	888	800	88	0.00%	2,400
Total Revenue	83,619	84,637	(1,018)	-1.20%	341,521	338,548	2,973	0.88%	1,015,644
Administrative Expenses	20,674	23,978	(3,304)	-13.78%	88,442	98,243	(9,801)	-9.98%	297,058
Tenant Services	-	500	(500)	-100.00%	98	2,000	(1,902)	-95.10%	6,000
Utility Expense	6,175	6,104	71	1.16%	23,387	24,417	(1,030)	-4.22%	73,250
Maintenance Expense	33,096	25,746	7,350	28.55%	100,641	105,667	(5,026)	-4.76%	319,688
General Expenses	6,186	8,267	(2,081)	-25.17%	28,348	33,067	(4,719)	-14.27%	99,200
Housing Assistance Payments	2,134	2,833	(699)	-24.68%	9,879	11,333	(1,454)	-12.83%	34,000
Financing Expenses	8,249	15,485	(7,236)	-46.73%	34,210	61,940	(27,730)	-44.77% ¹	185,820
Depreciation & Amortization	61,574	61,344	230	0.00%	247,609	245,377	2,232	0.00%	736,130
Total Expense	138,088	144,257	(6,169)	-4.28%	532,614	582,044	(49,430)	-8.49%	1,751,146
Net Operating Income (Loss)	(54,469)	(59,620)	5,151	-8.64%	(191,093)	(243,496)	52,403	-21.52%	(735,502)

Comments

¹ Budget for interest expense on HOPE VI mortgage is too high. Will propose adjustment for next budget amendment.

Lakeland Housing Authority
Renaissance at Washington Ridge Ltd., LLLP
Balance Sheet
April 30, 2013

Assets	Liabilities and Equity
<p>Current Assets</p> <p style="padding-left: 20px;">Cash - Unrestricted 290,873</p> <p style="padding-left: 20px;">Cash - Restricted 841,274</p> <p style="padding-left: 20px;">Accounts Receivable - Tenants 23,259</p> <p style="padding-left: 20px;">Allow for Doubtful A/R - Tenants (11,570)</p> <p style="padding-left: 20px;">Prepaid Expense 50,438</p> <p style="padding-left: 20px;">Other Current Assets 22,569</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Current Assets 1,216,843</p> <p>Other Assets</p> <p style="padding-left: 20px;">Property & Equipment 24,217,370</p> <p style="padding-left: 20px;">Accumulated Depreciation (6,533,678)</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">17,683,692</p> <p style="padding-left: 20px;">Intangible Assets 268,824</p> <p style="padding-left: 20px;">Accumulated Amortization (183,531)</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">85,293</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Other Assets 17,768,985</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Assets 18,985,828</p>	<p>Liabilities</p> <p>Current Liabilities</p> <p style="padding-left: 20px;">Accounts Payable 20,620</p> <p style="padding-left: 20px;">Tenant Security Deposits 41,038</p> <p style="padding-left: 20px;">Accrued Audit Fees 4,150</p> <p style="padding-left: 20px;">Due to West Lake Management 16,750</p> <p style="padding-left: 20px;">Tenant Prepaid Rents 2,811</p> <p style="padding-left: 20px;">Accr Compensated Absences Current 4,248</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Current Liabilities 89,617</p> <p>Other Liabilities</p> <p style="padding-left: 20px;">Accr Compensated Absences - LT 7,890</p> <p style="padding-left: 20px;">FSS Escrow Liability 16,291</p> <p style="padding-left: 20px;">Accrued Interest - HOPE VI Mortgage 450,534</p> <p style="padding-left: 20px;">Accrued Developer Fee 1,308,453</p> <p style="padding-left: 20px;">Loan Payable - HOPE VI 2,200,000</p> <p style="padding-left: 20px;">Loan Payable - SunTrust 643,686</p> <p style="padding-left: 20px;">Loan Payable - LHA 381,200</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Other Liabilities 5,008,054</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Liabilities 5,097,671</p> <p>Equity</p> <p style="padding-left: 20px;">Partners' Equity 13,888,157</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Equity 13,888,157</p> <p style="border-top: 1px solid black; border-bottom: 3px double black;">Total Liabilities and Equity 18,985,828</p>

**Lakeland Housing Authority
Colton Meadow, LLLP
Statement of Operations
For the Four Months Ended April 30, 2013**

	Current Month				Year to Date				Annual Budget
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
Rental Income	44,484	43,125	1,359	3.15%	175,967	172,500	3,467	2.01%	517,500
Other Tenant Income	1,325	1,663	(338)	-20.32%	4,686	6,652	(1,966)	-29.56%	19,955
Other Income	1	2	(1)	-51.92%	13	8	5	62.50%	25
Total Revenue	45,810	44,790	1,020	2.28%	180,666	179,160	1,506	0.84%	537,480
Administrative Expense	10,120	11,520	(1,400)	-12.15%	41,956	50,222	(8,266)	-16.46%	145,805
Tenant Services	-	125	(125)	-100.00%	-	500	(500)	-100.00%	1,500
Utility Expense	5,624	5,833	(209)	-3.58%	20,421	23,333	(2,912)	-12.48%	70,000
Maintenance Expense	6,651	9,696	(3,045)	-31.40%	24,051	39,701	(15,650)	-39.42%	120,020
General Expense	8,483	6,939	1,544	22.26%	34,740	27,755	6,985	25.17%	83,265
Financing Expense	7,327	7,515	(188)	-2.50%	29,309	30,061	(752)	-2.50%	90,184
Depreciation & Amortization Expense	38,937	38,937	-	0.00%	155,749	155,749	-	0.00%	467,247
Total Expense	77,142	80,565	(3,422)	-4.25%	306,226	327,321	(21,095)	-6.44%	978,021
Net Operating Income (Loss)	(31,332)	(35,775)	4,442	-12.42%	(125,560)	(148,161)	22,601	-15.25%	(440,541)

Lakeland Housing Authority
Colton Meadow, LLLP
Balance Sheet
April 30, 2013

Assets	Liabilities and Equity
Current Assets Cash - Unrestricted 567,816 Cash - Security Deposits 20,075 Cash - Reserve for Replacements 41,400 Cash - Tax & Insurance Escrow 15,561 Cash - Operating Reserve 881,074 Accounts Receivable - Tenants 19,595 Allow for Doubtful A/R - Tenants (13,551) Prepaid Expense 71,204 Other Current Assets 139,246 <hr style="border: 0.5px solid black;"/> Total Current Assets 1,742,420	Liabilities Current Liabilities Accounts Payable 9,620 Tenant Security Deposits 20,075 Accrued Interest Payable 1,162 Accrued Property Taxes 12,230 Accrued Audit Fees 3,110 Due to West Lake Management 7,070 Tenant Prepaid Rent 1,933 Accr Compensated Absences Current 604 <hr style="border: 0.5px solid black;"/> Total Current Liabilities 55,804 Other Liabilities Accr Compensated Absences - LT 1,122 Mortgage Note Payable 450,845 Mortgage - TCAP 1,231,424 Mortgage - FHFC 8,710,185 Mortgage - HOME 115,900 Developer Fee Payable 1,639,667 <hr style="border: 0.5px solid black;"/> Total Other Liabilities 12,149,143 Total Liabilities <hr style="border: 0.5px solid black;"/> 12,204,948 Equity Partners' Equity 962,612 <hr style="border: 0.5px solid black;"/> Total Equity 962,612
Other Assets Property & Equipment 12,151,235 Accumulated Depreciation (906,964) <hr style="border: 0.5px solid black;"/> 11,244,271 Tax Credit and Monitoring Fees 208,695 Accumulated Amortization (27,826) <hr style="border: 0.5px solid black;"/> 180,869 <hr style="border: 0.5px solid black;"/> Total Other Assets 11,425,140	
Total Assets <hr style="border: 0.5px solid black;"/> 13,167,560	Total Liabilities and Equity <hr style="border: 0.5px solid black;"/> 13,167,560

**Lakeland Housing Authority
Bonnet Shores, LLLP
Statement of Operations
For the Four Months Ended April 30, 2013**

	Current Month				Year to Date				Annual
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	Budget
Rental Income	50,549	51,998	(1,449)	-2.79%	198,579	207,993	(9,414)	-4.53%	623,980
Other Tenant Income	2,017	971	1,046	107.76%	7,033	3,883	3,150	81.12%	11,650
Other Income	1	1	(0)	-10.45%	3	3	-	0.00%	8
Total Revenue	52,567	52,970	(403)	-0.76%	205,615	211,879	(6,264)	-2.96%	635,638
Administrative Expense	9,483	11,223	(1,740)	-15.50%	40,378	49,109	(8,731)	-17.78%	142,546
Tenant Services	-	125	(125)	-100.00%	-	500	(500)	-100.00%	1,500
Utility Expense	4,040	4,375	(335)	-7.66%	16,684	17,500	(816)	-4.66%	52,500
Maintenance Expense	5,679	8,617	(2,938)	-34.10%	24,900	35,391	(10,491)	-29.64%	107,085
General Expense	9,831	6,654	3,177	47.74%	36,903	26,617	10,286	38.64% ¹	79,850
Financing Expense	10,304	14,709	(4,404)	-29.94%	41,217	58,834	(17,617)	-29.94% ²	176,502
Depreciation & Amortization Expense	47,465	47,465	-	0.00%	189,859	189,859	-	0.00%	569,578
Total Expense	86,802	93,167	(6,365)	-6.83%	349,941	377,810	(27,869)	-7.38%	1,129,561
Net Operating Income (Loss)	(34,236)	(40,198)	5,962	-14.83%	(144,326)	(165,931)	21,605	-13.02%	(493,923)

Comments

- 1 Fluctuation from budget is primarily due to Insurance Expense, \$5,377 (54%) over budget YTD and Bad Debt Expense \$4,716 (354%) over budget YTD.
- 2 Budget for Interest Expense on LHA Mortgage is too high. An adjustment will be proposed for the next budget amendment.

Lakeland Housing Authority
Bonnet Shores, LLLP
Balance Sheet
April 30, 2013

Assets		Liabilities and Equity	
Current Assets		Liabilities	
Cash - Unrestricted	50,846	Current Liabilites	
Cash - Security Deposits	21,000	Accounts Payable	806
Cash - Reserve for Replacements	58,125	Tenant Security Deposits	20,775
Cash - Tax & Insurance Escrow	49,092	Accrued Interest Payable	39,504
Operating Deficit Reserve Receivable	460,095	Accrued Property Taxes	15,480
Accounts Receivable - Tenants	15,005	Accrued Audit Fees	3,110
Allow for Doubtful A/R - Tenants	(7,830)	Due to West Lake Management	7,365
Prepaid Expense	19,598	Tenant Prepaid Rent	325
Other Current Assets	117,103	Accr Compensated Absences Current	616
Total Current Assets	783,034	Total Current Liabilities	87,981
Other Assets		Other Liabilities	
Property & Equipment	12,873,996	Accr Compensated Absences - LT	1,145
Accumulated Depreciation	(1,291,996)	TCAP Mortgage	3,819,255
	11,582,000	HOME Loan	131,028
Intangible Assets	288,008	LHA Mortgage	1,009,877
Accumulated Amortization	(37,020)	Developer Fee Payable	450,000
	250,988	Total Other Liabilities	5,411,305
Total Other Assets	11,832,988	Total Liabilities	5,499,286
Total Assets	12,616,022	Equity	
		Partners' Equity	7,116,736
		Total Equity	7,116,736
		Total Liabilities and Equity	12,616,022

**Lakeland Housing Authority
West Bartow Partnership, Ltd., LLLP
Statement of Operations
For the Four Months Ended April 30, 2013**

	Current Month				Year to Date				Annual
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	Budget
Rental Income	69,382	66,542	2,840	4.27%	279,410	266,167	13,243	4.98%	798,500
Other Tenant Income	956	271	685	252.77%	1,656	1,085	571	52.63%	3,254
Other Income	108	100	8	8.00%	419	400	19	4.75%	1,200
Total Revenue	70,446	66,913	3,533	5.28%	281,485	267,652	13,833	5.17%	802,954
Administrative Expenses	15,591	15,104	487	3.22%	58,328	62,243	(3,915)	-6.29%	188,555
Tenants Service Expenses	-	208	(208)	-100.00%	-	833	(833)	-100.00%	2,500
Utility Expense	9,525	10,392	(867)	-8.34%	37,931	41,568	(3,637)	-8.75%	124,704
Maintenance Expense	12,383	11,338	1,045	9.22%	42,846	47,061	(4,215)	-8.96%	142,890
General Expenses	254	4,171	(3,917)	-93.91% 1	(106)	16,682	(16,788)	-100.64%	50,046
Financing Expenses	24,242	19,949	4,293	21.52% 2	97,083	79,797	17,286	21.66%	239,390
Depreciation & Amortization	41,940	41,803	137	0.33%	167,760	167,213	547	0.33%	501,640
Total Expense	103,935	102,965	970	0.94%	403,842	415,397	(11,555)	-2.78%	1,249,725
Net Operating Income (Loss)	(33,489)	(36,052)	2,563	-7.11%	(122,357)	(147,745)	25,388	-17.18%	(446,771)

Comments

- 1 Reduction of bad debt expense = \$18,571 YTD. Results from reconciliation of internal audit of tenant ledgers.
- 2 Financing Expense budget does not include interest earned on developer fee payable. An adjustment will be proposed for the next budget amendment.

Lakeland Housing Authority
West Bartow Partnership, Ltd., LLLP
Balance Sheet
April 30, 2013

Assets	Liabilities and Equity																																																																												
<p>Current Assets</p> <table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 80%;">Cash - Unrestricted</td><td style="text-align: right;">61,489</td></tr> <tr><td>Cash - Security Deposits</td><td style="text-align: right;">7,300</td></tr> <tr><td>Cash - Operating Reserve</td><td style="text-align: right;">25,316</td></tr> <tr><td>Cash - Reserve for Replacements</td><td style="text-align: right;">95,833</td></tr> <tr><td>Cash - Tax & Insurance Escrow</td><td style="text-align: right;">32,846</td></tr> <tr><td>Operating Reserve</td><td style="text-align: right;">226,159</td></tr> <tr><td>Accounts Receivable - Tenants</td><td style="text-align: right;">3,400</td></tr> <tr><td>Allow for Doubtful A/R - Tenants</td><td style="text-align: right;">(1,402)</td></tr> <tr><td>Prepaid Expense</td><td style="text-align: right;">11,859</td></tr> <tr><td>Other Current Assets</td><td style="text-align: right;">4,742</td></tr> <tr><td>Total Current Assets</td><td style="text-align: right; 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border-top: 1px solid black; border-bottom: 3px double black;">7,080,315</td></tr> <tr><td>Partners' Equity</td><td style="text-align: right;">7,094,989</td></tr> <tr><td>Total Equity</td><td style="text-align: right; border-top: 1px solid black; border-bottom: 3px double black;">7,094,989</td></tr> <tr><td>Total Liabilities and Equity</td><td style="text-align: right; border-top: 1px solid black; border-bottom: 3px double black;">14,175,304</td></tr> </table>	Accounts Payable	14,402	Tenant Security Deposits	7,400	Accrued Property Taxes	844	Accrued Interest Payable	15,168	Accrued Audit Fees	3,690	Due to West Lake Management	13,070	Tenant Prepaid Rent	5,406	Accr Compensated Absences Current	1,732	Mortgage Note Payable	3,253,167	Second Mortgage Note Payable	850,000	Third Mortgage Note Payable	405,258	Fourth Mortgage Note Payable	400,000	Note Payable - City of Bartow Impact Fees	564,621	Deferred Development Fee	1,542,341	Accr Compensated Absences - LT	3,216	Total Liabilities	7,080,315	Partners' Equity	7,094,989	Total Equity	7,094,989	Total Liabilities and Equity	14,175,304
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LAKELAND HOUSING AUTHORITY
April 2013
All Grants

	START DATE	OBLIGATION END DATE	DISTRIBUTION END DATE	AUTHORIZED	OBLIGATION 90% THRESHHOLD	OBLIGATED AMOUNT	DISBURSED	AVAILABLE BALANCE
Capital Fund Program								
CFP - 2009	09-15-09	09-14-11	09-14-13	640,879.00	576,791.10	617,533.78	617,533.78	23,345.22
CFP - 2010	07-15-10	07-14-12	07-14-14	639,073.00	575,165.70	638,666.00	638,666.00	407.00
CFP - 2011	07-15-11	07-14-13	07-14-15	562,980.00	506,682.00	441,191.00	441,191.00	121,789.00
CFP - 2012	03-12-12	03-11-14	03-11-16	327,414.00	294,672.60	0.00	0.00	327,414.00
			CFP Subtotal:	2,170,346.00	1,953,311.40	1,697,390.78	1,697,390.78	472,955.22
Replacement Housing Factor								
RHF - 2009	09-15-09	09-14-11	09-14-13	431,912.00	388,720.80	0.00	0.00	431,912.00
RHF - 2010	07-15-10	07-14-12	07-14-14	441,385.00	397,246.50	0.00	0.00	441,385.00
RHF - 2011	08-03-11	10-29-15	10-29-17	380,321.00	342,288.90	0.00	0.00	380,321.00
RHF - 2012(a)	03-12-12	03-11-14	03-11-16	185,485.00	166,936.50	0.00	0.00	185,485.00
RHF - 2012(b)	03-12-12	03-11-14	03-11-16	70,661.00	63,594.90	0.00	0.00	70,661.00
			RHF Subtotal:	1,509,764.00	1,358,787.60	0.00	0.00	1,509,764.00
HOPE VI	04-05-00		12-31-17	21,842,801.00		19,908,767.13	19,908,767.13	1,934,033.87
Resident Opportunities and Self Sufficiency								
ROSS - Family Self Sufficiency 2012	09-26-12		07-01-14	52,084.00			0.00	52,084.00
ROSS - Family Self Sufficiency 2011	09-22-11		07-01-13	52,084.00			52,084.00	0.00
ROSS - Service Coordinator 2011	09-22-11		09-29-14	140,838.00			54,120.83	86,717.17
			ROSS Subtotal:	245,006.00			106,204.83	138,801.17
Youth Build (DOL)	06-01-11		05-31-14	997,492.00			381,071.00	616,421.00
			Youth Build Subtotal:	997,492.00			381,071.00	616,421.00
21st Century								
Department of Education 2012(WL)	08-01-12		09-20-13	369,283.00			262,313.00	106,970.00
			21st Century Subtotal:	369,283.00			262,313.00	106,970.00
			GRANT TOTALS	27,134,692.00			22,355,746.74	4,778,945.26

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I. Authority-Wide Updates

Section 3 and M/WBE: No new contracts, change orders/amendments, or task orders were executed during this reporting period. Accordingly, the Section 3 and Minority/Women Business Enterprise (M/WBE) data remains unchanged from the May 2013 report. Below is a recap of data that was reported in May.

- A total of \$227,998 is contracted to M/WBE firms; which equates to 60% of the total dollar volume contracted by LHA.
- Eight (8) of the 31 contracts are with M/WBE firms. This represents 26% of the contracts.
- Three (3) of the 31 contracts are with Section 3 Business Concerns; which represents approximately 10% of the contracts.
- One (1) Section 3 Hire has been employed as part of LHA's existing contracts.

Green Physical Needs Assessment: The Department of Housing and Urban Development (HUD) is in the process of consolidating the capital fund rules. As part of the process, HUD is now requiring all public housing authorities (PHAs), regardless of size, to conduct Green Physical Needs Assessments (GPNA) of common areas, community buildings, and dwelling structures. Once HUD issues the final rule, PHAs will be required to submit their GPNA to HUD 90 days prior to the start of the new fiscal year. As LHA's fiscal year begins on January 1, 2014, the authority is making preparations to have its GPNA completed and submitted to HUD by October 1, 2013. On April 12, 2013, LHA issued a Request for Qualifications (RFQ) for third party engineering firms to conduct the GPNA. Proposals were due on April 29, 2013. Seven (7) firms submitted proposals by the deadline. Staff established a three-member review team to evaluate the proposals. Interviews with the two highest scoring respondents occurred on May 15, 2013. Afterwards--in accordance with Florida's Consultant Competitive Negotiations Act--the higher ranked firm, EMG, was invited to enter into fee negotiations with LHA. These negotiations were successful. A copy of the scoring matrix is contained within Resolution Number 13-1354. Based on the above selection process, staff is recommending that the Board of Commissioners, at its June 17 2013 meeting, approve contracting with EMG for an initial one-year period at a not-to-exceed contract value of \$39,000.00.

Additional Projects:

- Staff continued to manage the operations of the Lake Ridge Home Owners Association. Current projects include: working in conjunction with West Lake Management to resolve parking and trespassing issues in the alley way between the Lake Ridge homes and the Lake Ridge rental properties; addressing and resolving the delinquent HOA fees; and re-establishing a Neighborhood Watch Program.
- Last reporting period, the Lake Ridge Home Owners Association reported that they were not satisfied with existing lawn maintenance services. Accordingly, they requested that LHA terminate the contract. LHA staff sent the contractor written notification that their contract would terminate on June

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30, 2013. West Lake Management, LHA affiliate, will assume responsibility for the contract on July 1, 2013. During the month of May, Real Estate Development staff worked with outside counsel to draft a contract between West Lake Management and the Lake Ridge Home Owners Association.

II. LHA Portfolio

Cecil Gober

- Environmental Testing: LHA received demolition drawings from Robert Reid Wedding Architects (RRW) on June 5, 2013. Receipt of the drawings allowed LHA to reissue the task order proposal request for environmental testing the week of June 10, 2013.
- ALTA Survey: On Wednesday, May 22, 2013, ECON mobilized to perform the American Land Title Association (ALTA) survey. ECON completed all work associated with the survey on May 28, 2013. Electronic and hard copies of the survey were submitted to LHA for approval on May 31, 2013. Staff is in the process of completing the closeout documentation and issuing final payment on the task order.
- Aging-In-Place Modernization: On May 22, 2013, staff met with team members from Robert Reid Wedding Architects (RRW). The purpose of the meeting was to: discuss preparation of construction documents; vet design issues; and select materials for the flooring, countertops, vanity tops, plumbing fixtures, and light fixtures. RRW commenced preparation of construction documents based upon feedback received as part of the meeting. RRW completed all work associated with preparation of the construction documents on June 5, 2013. This resulted in staff facilitating a third design meeting with RRW, the same day, to review changes incorporated into the construction documents and to make final selection on the finishes. After this design meeting, team members from LHA and RRW submitted the stamped, construction documents to the City of Lakeland for permitting. On Friday, June 7, 2013, RRW transmitted the bid and contracting documents to Lakeland Blueprint and Supplies. Additionally, staff posted the upfront documents and specifications to the LHA website. Staff also emailed Public Notice to approximately 95 potential bidders and four (4) Plan Houses. The Pre-Bid Conference is scheduled to occur on Thursday, June 13, 2013 at 9 a.m., EDT, at the Emma Turner Building.

Hampton Hills Homes

- Homeownership Plan: There has been no change on the status of the Homeownership Plan. To recap--in November 2012, LHA submitted the Homeownership Plan to the Special Application Center (SAC) for approval. At that time, staff received notification that SAC had a backlog of applications and that it could take up to one (1) year to issue approval of the plan. Despite the backlog, SAC agreed to expedite approval of the Homeownership Plan for Hampton Hills. On March 21, 2013, SAC requested supplemental information from LHA for their review. During the months of April and May,

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staff drafted responses to inquiries from SAC in reference to the Homeownership Plan. The submittal was sent to SAC on Friday, May 10, 2013. On June 4, 2013, staff emailed SAC requesting an update on the status of the plan and is waiting for a response.

John Wright

- Real Estate & Development staff did not perform any duties related to John Wright during this reporting period.

Westlake

- Fiscal Year 2012 Capital Fund Emergency Safety and Security Program: Lakeland Police Department (LPD) continues to develop a Crime Prevention Through Environmental Design (CPTED) for the property. Once completed, the CPTED will be used to procure a firm to provide and install surveillance equipment at Westlake and Westlake Addition. LHA has until March 20, 2014 to obligate 90% of the \$250,000 grant award received from the Department of Housing and Urban Development (HUD).

Williamstown

- Renewal of Existing Loans: On May 20, 2013, the Board of Commissioners approved Resolution Number 13-1353 to renew existing loans with Community Southern Bank for 4379 Williamstown Road. The Commercial Term Loan will be for up to \$264,235 with a term of 36 months. The interest rate will be fixed at a rate of 5% with a repayment plan of monthly interest and principal payments based upon the remaining 12-year amortization. The Revolving Line of Credit (LOC) will be for up to \$400,000 with a 20-month term. The interest rate for the LOC will be floating with a floor of 5%. Community Southern Bank's Underwriting Department is in the process of preparing the closing documents. As outlined by the commitment letter and amendment, the financial closings for both loans must occur by July 31, 2013.

III. Affiliates

- Taxes: On May 30, 2013, Governor Rick Scott signed HB 437. This bill addressed tax exemption changes. As the bill did not contain a provision to grandfather in existing projects with tax exemptions, Dakota Park and Renaissance at Washington Ridge will now have to include real estate taxes within their budgets. Real Estate Development staff confirmed that The Manor at Renaissance will still qualify for tax exemption as 75% of the occupants are age 62 or older. Staff submitted required documentation to the tax assessor's office the week of June 3, 2013. The request is currently under review.

Colton Meadow

- Real Estate and Development staff did not perform any duties related to Colton Meadow during this reporting period.

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Dakota Park

- Exterior Paint: PAINTSMART USA, INC. (PUI) completed all work associated with exterior painting at Dakota Park during this reporting period. Staff conducted the final walkthrough on May 29, 2013. As part of the walkthrough, staff prepared a punch list and submitted it to PUI for completion. PUI has since completed the punch list. Staff is in the process of completing the closeout documentation and issuing final payment on the contract.
- Fiscal Year 2012 Capital Fund Emergency Safety and Security Program: Lakeland Police Department (LPD) continues to develop a Crime Prevention Through Environmental Design (CPTED) for the property. Once completed, the CPTED will be used to procure a firm to provide and install surveillance equipment at Dakota Park. LHA has until March 20, 2014 to obligate 90% of the \$250,000 grant award received from the Department of Housing and Urban Development (HUD).
- Repair, Seal, and Re-striping Parking Lots: On April 12, 2013, LHA issued an Invitation for Bid (IFB) for repair, seal and re-striping of the parking lots at Dakota Park. Bids were due on April 18, 2013. Two respondents submitted bids. The bid from Atkins Paving, Inc. (API) was responsive and contained the lowest price. Real Estate and Development staff assisted the Housing staff with contract administration and closeout of the project. API has completed all work associated with repair, sealing, and re-striping of the parking lots. Staff is in the process of completing the closeout documentation and issuing final payment on the contract.
- Name Change: At Housing's request, Real Estate Development staff commenced working with outside counsel and Florida Housing Finance Corporate (FHFC) to change the name for Dakota Park. Once approved, the new name for Dakota Parks will be Carrington Place.

Renaissance

- FY 1999 HOPE VI Funds: Staff commenced preparation of the Alternative Development Plan (ADP) submission for \$1.9 million remaining in HOPE VI funds. In support of development of the ADP, staff facilitated meetings with Irbye G. Giddens (IGG), original Architect of Record for homeownership units at the Renaissance HOPE VI lots. The meetings occurred on May 17, 2013 and May 31, 2013 respectively. As part of the meetings, IGG confirmed that in 2008 the IGG had obtained permits for drawings associated with 3-bedroom, duplex dwelling structures at Renaissance lots 12, 13, and 14. Despite being permitted, the duplexes were never constructed due to the subprime mortgage crisis of 2009. Accordingly, it would be feasible for LHA or its affiliate to develop up to 20 units on the 15, undeveloped, HOPE VI lots. Staff completed the ADP on Friday, May 31, 2013. The document was transmitted to HUD's Local Field Office for review and approval the same day. On Monday, June 3, 2013, HUD's Local Field Office requested a clarification to one component of the plan. LHA submitted the clarification the

REAL ESTATE & DEVELOPMENT

same day and is now awaiting HUD approval of the ADP. Key components of the ADP include the following:

If approved, LHA will develop a minimum of 12 units via two phases. Phase 1 will consist of four (4) 3-bedroom units located on lots 12 and 14-- which had previously been permitted. Phase 2 will be comprised of eight (8) units. As part of the ADP, LHA will proceed with design activities for both phases simultaneously; however, construction of the eight (8) units will lag behind the initial four (4) units by approximately four months due to engineering required on these previously unpermitted lots. LHA or its affiliate would single-source IGG to update the plans that were permitted in 2008 to current building code. The ADP contemplates issuing an Invitation for Bid (IFB) to procure a general contractor for construction of the units in August 2013. This would allow construction to begin as early as October 2013.

The Manor at West Bartow

- Real Estate & Development staff did not perform any duties related to the Manor at West Bartow during this reporting period.

Villas at Lake Bonnet

- Real Estate & Development staff did not perform any duties related to the Villas at Lake Bonnet during this reporting period.

**The Housing Authority of the City of Lakeland
Request for Board Action**

1. Describe Board Action Requested and why it is necessary:

Re: Resolution # 13-1354

The Board of Commissioners is requested to approve the above-referenced resolution to authorize the Executive Director to enter into contract with *EMG* to provide Green Physical Needs Assessment Services.

2. Who is making request:

- A. Entity: The Housing Authority of the City of Lakeland
- B. Project: Provision of Green Physical Needs Assessment Services
- C. Originator: Carlos Pizarro/Valerie Brown

3. Cost Estimate:

Not-to-exceed \$39,000.

Narrative:

The Housing Authority of the City of Lakeland is required by the U.S. Department of Housing and Urban Development (HUD) to conduct a Green Physical Needs Assessment of the housing units and community buildings located on its following properties: Dakota Park Apartments; Lake Ridge; Renaissance; The Manor at Washington Ridge; West Lake Apartments; John Wright Homes; and Cecil Gober Apartments.

The results of this assessment will provide necessary planning data for the future preventative maintenance and capital improvements of these communities.

A Request for Qualifications (RFQ) for the above assessment services was issued on April 12, 2013. The RFQ was emailed to 39 engineering firms. Notice of the RFQ was also posted on the *Lakeland Housing Authority* web site, on the *FAHRO* (Florida Association of Housing and Redevelopment Officials) web site, on the *RFP Data Base* web site, as well as with the *Central Florida Business Diversity Council*.

Seven responses to the RFQ were received prior to the April 29, 2013 deadline. All responses were reviewed by a three-member review team. (A copy of the scoring matrix is provided after the *Resolution*.)

The proposals submitted by two of the firms:

- *EMG* (Hunt Valley, Maryland with branch offices located in Florida) and

- *GLE and Associates* (Tampa, Florida)

indicated to the review team that these firms had the ability to best serve the anticipated needs of the Housing Authority.

On May 15, 2013, both firms were individually interviewed by the three-member review team. Afterwards--in accordance with Florida's *Consultant Competitive Negotiations Act*--the higher ranked firm, *EMG*, was invited to enter into fee negotiations with the Housing Authority. These negotiations were successful.

Based on the above selection process, staff is recommending that the Board of Commissioners, at its June 17 2013 meeting, approve contracting with *EMG* for an initial one-year period at a not-to-exceed contract value of \$39,000.00.

RESOLUTION NO. 13-1354

**APPROVING THE AWARD OF A CONTRACT FOR
GREEN PHYSICAL NEEDS ASSESSMENT SERVICES**

WHEREAS, The Housing Authority of the City of Lakeland is required by the U.S. Department of Housing and Urban Development to conduct a Green Physical Needs Assessment of certain housing units and community buildings; and

WHEREAS, on April 12, 2013, the staff of The Housing Authority of the City of Lakeland issued a Request for Qualifications for the provision of *Green Physical Needs Assessment Services*; and

WHEREAS, on April 29, 2013, responses were received from seven engineering firms interested in providing the above services to The Housing Authority of the City of Lakeland; and

WHEREAS, after ranking these seven responses, the two higher-ranked firms (see attached matrix) were invited to individually interview and to make a presentation before the staff review committee; and

WHEREAS, as a result of these interviews, the top scoring firm was invited to enter into fee negotiations with The Housing Authority of the City of Lakeland; and

WHEREAS, after negotiating the cost of these services, staff is recommending that this firm, **EMG**, be awarded the contract for these services;

NOW THEREFORE, BE IT RESOLVED that the Board of Commissioners of LHA hereby approves the award of a contract for the provision of *Green Physical Needs Assessment Services* to **EMG** effective July 1, 2013 and ending June 14, 2014 with a not-to-exceed value of \$39,000 with the right to renew the contract for an additional one-year period.

CERTIFICATE OF COMPLIANCE

This is to certify that the Board of Commissioners of The Housing Authority of the City of Lakeland has approved and adopted this Resolution No. 13-1354 dated June 17, 2013.

Attested by:

Benjamin Stevenson, Secretary

Michael A. Pimentel, Chair

**PROPOSAL RATING SHEET MATRIX
GREEN PHYSICAL NEEDS ASSESSMENT (GPNA) SERVICES**

	◀ ▶ ▮	FIRM
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CRITERIA		EMG	GLE	Nova	Perez	PSI	TLC	Tyson & Billy
<p><i>Information requested under Tab 1—Experience</i> Demonstrate the offeror's experience and competence in the type of work requested. Demonstrate the offeror's familiarity with HUD's new GPNA tool. Provide an organization chart and resumes of the personnel that will be assigned to work with LHA. Include individual staff qualifications and pertinent staff experience.</p>	A	35	35	0	25	30	35	30
	B	25	35	0	30	20	30	25
	C	35	35	7	21	14	28	35
<p><i>Information requested under Tab 2—Capability and Capacity</i> Demonstrate the offeror's capability and capacity to accomplish the required work within the required timeframe. (Please be advised that the timetable for completion is subject to changed based on HUD's ability to release the Final Rule for Green Physical Needs Assessment at 24 CFR 905. September 1, 2013 should be used as the most probable deadline currently available.) Demonstrate familiarity with Public Housing Programs, Capital Fund Programs, and HUD rules, regulations and guidelines pertaining to the operations of these programs. Describe the offeror's current and projected workload in the next twelve months.</p>	A	55	54	0	40	40	53	40
	B	40	50	0	40	40	40	50
	C	55	37	18	18	37	37	37
<p><i>Information requested under Tab 3—</i> Provide:</p> <ul style="list-style-type: none"> ▪ A copy of current State of Florida Engineering license(s). ▪ Proof of current Errors and Omissions insurance coverage. ▪ A minimum of five references with contact names, addresses and telephone numbers of housing authorities where work has been performed. <p>Complete and provide the following documents:</p> <ul style="list-style-type: none"> ▪ HUD Form 5369-C ▪ HUD Form 50070 ▪ Section 3 Business Form ▪ Non-Collusion Certification, and ▪ Public Entity Crime Statement 	A	10	10	10	10	10	10	10
	B	10	10	10	10	10	10	10
	C	10	10	10	10	10	10	10
TOTAL		275	276	55	204	211	253	247
AVERAGE		91.7	92.0	18.3	68.0	70.3	84.3	82.3

**Secretary's Report
June 2013**

Lincoln Square

LHA continues to monitor the property for the City of Lakeland CRA while they await demolition.

Public Housing Subsidy

The current Public Housing Subsidy allocations will be inadequate to operate the properties. Staff has determined it will be necessary to supplement the subsidy with funds from the Public Housing Operating Reserve. The properties at Renaissance may be entitled to supplement their respective shortfall in subsidy with the Owners Operating Reserve that was funded by the equity investment at the property. The reserve would need to be refunded from cash flow, if available, in 2013. This outcome is what HUD intended in their reduction in operating subsidy. Staff continues to monitor this item.

Staff is also reviewing the impact of the Sequestration Budget on LHA. As data becomes available, staff is analyzing its impact on staffing and the provision of services. We will continue to provide updates for the Board when new information becomes available.

HCV Housing Assistance Payments

HUD has also significantly reduced our Housing Assistance Payment (HAP) funds from anticipated and budgeted levels. With HUD's encouragement, LHA leased up during the 2011 fiscal year in anticipation of increased HAP. Staff continues to work with the Miami Field office to correct this item. LHA has also applied for set aside funding for additional HAP. Staff is also working with other PHA's to absorb vouchers currently being paid by LHA which will also result in a savings for LHA. Staff continues to monitor this item as well as the impact of the Sequestration Budget on the Section 8 program at LHA.

HOPE VI Funds Expenditure

Pursuant to a follow-up conversation with Juan Miranda of HUD-Miami regarding the unexpended HOPE VI funds. HUD would like for LHA to obligate the funds as quickly as possible. Staff submitted a proposal to use the HOPE VI funds to construct some affordable rental housing units on the vacant lots at the HOPE VI site. We are waiting on HUD's approval of the proposal. Details will be provided for the Board at a later date.

Annual Budget/Agency Update

A presentation on the State of the Agency that includes the proposed 2013 annual budget, staff organization chart, and Corrective Action Plan (resulting from the Forensic Audit and HUD

Secretary's Report
June 2013

Review) was presented at the November Board meeting. A copy of the draft Correction Action Plan has also been submitted to the HUD-Miami office for review and comment. Each of these items was discussed at the Commissioner Retreat. The proposed budget was approved by the Board at the January 2013 meeting. LHA subsidy calculations cannot be finalized until Congress approves the HUD budget. That is, until Congress approves the HUD budget, all numbers are considered to be estimates because they can and probably will change. Once Congress approves HUD budget, the LHA budget will be revised to match the numbers in the HUD budget. The LHA budget updates were be resubmitted to the LHA Commissioners at the March, April and May Board meetings. Staff is still reviewing the impact of the Sequestration Budget on LHA's budget. Staff will notify the Board of any reductions in funding, whether temporary or permanent, that a significant impact of services or staffing.

HUD has approved the Corrective Action Plan and recommended acceptance by the LHA Board. The Board provided acceptance at the January 2013 meeting. Periodic updates on the status of items in the Corrective Action Plan will be given to the Board on a minimum quarterly basis. A copy of the most recently updated Corrective Action Plan is included with this month's report. The update was also submitted to HUD-Miami.

Section 3 and M/WBE Policy

The Section 3 and Minority/Women Business Enterprise Policy for LHA was approved at the November 2012 Board meeting. The policy provides statements regarding required Section 3 language for all LHA contracts, minimum percentages of contract dollar amounts for contractors to subcontract to M/WBEs and Section 3 business concerns, and forms for reporting compliance with the Section 3 and M/WBE policy.

LHA held a "How To Do Business with LHA" meeting on Wednesday, March 6, 2013. The meeting was open to the public and invites were sent to all firms on the LHA vendor's list. The Section 3 and M/WBE policies were discussed in detail at the meeting. A question and answer session was also a part of the program. A follow-up meeting will be scheduled at a later date.

Agency Plan

The Agency Plan was approved by the LHA Board of Commissioners at the October 2012 Board meeting. Prior to Board approval, copies of the Plan were made available for review and public comment for forty-five (45) days. Copies of the Plan were also provided for LHARAA, the City of Lakeland, local neighborhood associations, and the NAACP as well as being placed in public libraries. A public hearing on the Plan was held on Monday, October 8, 2012 at the LHA central office. The Plan has been submitted to the U.S. Department of Housing and Urban Development Miami office for review and approval.

Secretary's Report

June 2013

Summer Youth Programs

LHA is continuing our efforts to build partnerships while providing summer programs in our communities. In the spirit of that initiative, we have joined with Polk Works to provide a Summer Youth Employment Program at the Emma Turner Center. The partnership will provide employment and training opportunities for youths age 16-21. Residents of all communities may visit Emma Turner Center to learn about employment and training opportunities.

LHA is also continuing its partnership with Girls, Inc. of Lakeland and their Prodigy Cultural Arts Program. This program is also being offered at the Emma Turner Center. All young ladies in our communities between ages 13 to 17 are encouraged to participate.

Meetings

I attended a meeting with the Golden Gate Scientific Leadership Academy. I am working with this group on a charter school application. Students residing at all of the LHA communities may apply for admission, if the application is approved.

I was inducted into the Mulberry High School Alumni Hall of Fame on May 31, 2013. The induction was a part of the Senior Awards Night ceremony. I was also able to offer words of encouragement to the graduating seniors.

I also attended the Morning with the Mayor breakfast with Mayor Gow Fields along with several other staff of the City of Lakeland and local citizens. The Mayor provided updates on activities in the city.

Respectfully submitted,

Benjamin Stevenson

Secretary

Procurement

In addition to the normal day-to-day procurement activities (such as: monitoring invoices and certified payroll reports submitted by contractors, writing agreement modifications, and maintaining contract files and vendor lists), the following activities were accomplished in May 2013:

- Issued a Request for Proposals for *Pest Control Services at Various Properties*.
- Issued a Request for Qualifications for *Green Physical Needs Assessment (GPNA) Services*.
- Issued Task Order 01 to *ECON* for surveying services for the *Cecil Gober Aging In-place* project with a not-to-exceed value of \$5,020.00.
- Issued Task Order 01 to *GLE Associates* for *Environmental Testing of the Security Monitoring Office* to be located in the LHA administration building with a not-to-exceed value of \$1,995.00.

Resident Services May 2013 Board Report

- **Resident Services and Support Services Programs (ROSS)**

Production Summary

The ROSS Resident Service Coordinator continues to move forward in an effort to secure the provision of certain supportive services to eligible public housing residents (family, elderly, and disabled). The provision of these services contributes to the improvement of the quality of life for LHA residents who participate in the RSC program. Referral information continues to be provided to residents to assist them in their areas of need.

Community Involvement

During the month of May, the ROSS Coordinator attended the following meetings and/or community events:

- May 16th - Girls Inc. of Lakeland's Annual She Knows Where She's Going Awards Luncheon at The Lakeland Center



**Pictured left to right: Rashard Johnson, Alice O'Reilly, Ben Stevenson
and Earl Haynes at the VISTE 30th Annual Luncheon Meeting**

On May 1st, Benjamin Stevenson, Executive Director of the Lakeland Housing Authority (LHA), welcomed an opportunity to participate in South McKeel Academy's Career Day. Rashard S. Johnson, a sixth grade student at SMA, arrived at the agency with his pen and pad in hand, to shadow Stevenson. Throughout the day, Rashard asked questions and took notes about what Stevenson's role is at the agency. He also had the opportunity to meet various staff members. One of the highlights of his day was attending the Annual Meeting and 30th Year Celebration of VISTE (Volunteers in Service To the Elderly), an agency that provides meals and services to LHA's elderly population.

The luncheon meeting was held at the Lakeland Yacht Club. The ROSS Coordinator and Earl W. Haynes, Resident Services Director also attended the luncheon.

➤ **Sixteenth Annual Lakeland Mayor's Prayer Breakfast**



Mayor Gow B. Fields and his wife, Kay



Linda Willis with LHA Resident Commissioner Dorothy Sanders

On May 2nd, some LHA residents, commissioners, staff, and partners attended the City of Lakeland's 16th Annual Mayor's Prayer Breakfast. Words of Welcome were given by Mayor Gow B. Fields. Pastor Scott Thomas of Lakeland was the keynote speaker. The Resident Services Coordinator was in attendance.

➤ **Lakeland Housing Authority/Polk Works Job Fair & Recruitment Event**



Job Readiness Workshop



Applicants were interviewed on the spot

In support of the Polk Works' Race to Place, the Lakeland Housing Authority hosted a Job Fair/Recruitment Event on Tuesday, May 14, 2013, from 10:00 a.m. until 2:00 p.m. The host-site was the LHA Emma Turner Center located at 1500 North New York Avenue in Lakeland. Participating employers conducted on-site interviews. Ten applicants were hired. To prepare its clients and residents of the Paul A. Diggs Neighborhood, LHA hosted Job Readiness Workshops

on Monday, May 06, 2013. During the workshops, participants learned how to prepare a Resume', interviewing techniques, and job retention. The workshops were facilitated by staff members of Polk Works. These efforts were initiated and coordinated by the Resident Services Coordinator.

Office Skills Training Program/Maintenance Skills Training Program

During the month of May, the participants of the Office Skills Training Program and Maintenance Skills Training Program continued in their on-the-job training at their assigned sites. Also, the staff of LHA was very pleased when they received the announcement that LHA's Office Skills Training Program was chosen to receive a NAHRO Award of Merit in Housing and Community Development.

Job Search/Florida ACCESS Center

The Job Search/Florida ACCESS Center continues to provide the opportunity for residents, who are unemployed or underemployed to utilize the computers to search for employment. There are two computers on-site at the LHA Central Office and twelve at LHA's Emma Turner Center. During the month of May, residents continued to utilize the computers at the Emma Turner Center and LHA Central Office for job search, ACCESS/Florida, Florida Virtual School and other on-line needs.

Lakeland Housing Authority Resident Advisory Association, Inc. (LHARAA)

LHARAA held its monthly meeting with the residents on Monday, May 13, 2013. The host-site of the meeting was the Gober Villa Community Room.

- **YouthBuild-Lakeland**

Academics

The academics portion of the program continues to move right along. In addition to GED preparation, the participants are working on keeping their skills sharp in typing and communications. Also, students have begun working on Construction mathematics. The students are patiently awaiting their results from the GED exam and are expecting good things. Each day finds the participants growing and gaining confidence in and out of the classroom.

Construction Training

The participants recently completed the Habitat for Humanity home in Mulberry. They have now turned their attention towards building a single family home in Lakeland. In addition, the participants are continuing to work on their construction certification.

Career Development

Cycle 9 participants did an excellent job creating career boards that visually represent their dreams, which they presented to the class (pictured below).



Shantel Holt's vision of becoming a registered nurse.



Cody Allen's vision of joining the Army.

Career visions include military as a stepping stone to LPD, nursing, paramedics, photography, dental assisting, graphic design, HVAC and culinary. Participants have also been working on:

- Building individual skill inventories by reviewing the top 60 soft skills demanded by employers
- Completing a Master Application designed to give them initial experience in completing job applications and most importantly, to validate previous work history.
- Reviewing the do's and don'ts of resume writing and perusing examples of good and bad resumes. This is preliminary to resume writing, which they will begin in June.
- Practicing responses to key interview questions in preparation for mock interviews in June.

Congratulations are in order for the following Cycle 8 students:

- Samantha Cohn and Elijah Smith for completing their fingerprinting with the FDLE in order to be scheduled for the Certified Nursing Assistant State Exam. They should be ready to take the exam in June.
- Bobby Foreman has completed registration with Traviss to start the welding program in August.
- Sondra Lowe was offered a full-time position with the YMCA after working as a temporary from Rita.
- Keenan Thaxter has completed registration with Traviss to start the automotive program in August.
- Marie Bobbitt started her Associate Degree Program in Nursing at Polk State College.

Funding

Since YouthBuild Lakeland was not awarded a 2013 DOL grant, we are continuing to look into other funding possibilities to sustain the program. Because we have been recognized as one of the top performing programs in the country by YouthBuild USA, they are exploring options for us as well so that we can continue offering our services to young people in our community.

- **Public Housing/Family Self-Sufficiency Program (PH/FSS)**

* The percentage using the total number of FSS clients and total number of clients with escrow.

May 2013	# FSS Tenants	# with Escrow	% with Escrow	Escrow Amount (\$)
Public Housing (02,04) (05)	30	14	47	34,810.24
Dakota Park (13)	07	04	57	20,220.45
Renaissance (14)	10	02	22	17,327.55
Totals	47	20	43*	72,358.24

Public Housing FSS Waiting List: Zero (0)

- The Coordinator continues to meet with residents, by walking the sites and having one-on-one meeting. Each resident is given available supportive services in the community.

Enrollment: One (1)

Termination/Forfeiture/Transfer/Disbursement: One (1) Tenant no longer lives in Public Housing/moved out

Obtained Employment: Zero (0)

Section 8/Family Self-Sufficiency Program (S8-FSS) Statistics

Programs	# Of FSS Tenants	% Slots filled	# Tenants with Escrow	% With Escrow
Section 8 HCV)	61	81	32	53%

Escrow Balances

- The balance of the Section 8 FSS Escrow May 2013 is \$129,201.91

- The average amount is \$ 4,037.56

Recruiting: Zero (0)

Housing Choice Voucher Program (Section 8): The FSS Coordinator continues to submit the FSS clients 50058 data to Public and Indian Housing (PIC) in a timely manner, while ensuring that the information in PIC is current and up-to-date.

(HCV) Termination/Forfeiture/Transfer/Disbursement: Zero (0) Terminations for the month of May 2013.

Goals completed/enrolled by the Section 8 FSS participants: Zero (0) new enrollments

Completed Contract of Participation: Zero (0) participants completed their contracts of participation.

Services needed to complete Contract of Participation: A large number of our clients need assistance with childcare, however, at the present time; the only childcare provider available in the community is with Arbor E&T. This childcare provider currently has a waiting list.

Community Networking

Agency Connection Network (ACN)

Bank on Programs

Polk Work Partner Management

- **Westlake 21st Century Community Learning Center**

- We had 80 students enrolled in the month of May.
- Early release day was May 1st.
- Mad Science was at our center for our May Parental Involvement Night on.
- Our fundraiser at BD's Mongolian Grill was on May 28th.
- Our 21st CCLC Staff Meeting was held on May 29th.
- The orientation for our summer program was May 30th.
- The last day for our after-school program was May 31st.

- **Upcoming**

We are going to have a mass food distribution on June 10th. The summer program begins on June 11th. Our next fundraiser at BD's Mongolian Grill will take place on June 25th.

Earl W. Haynes
Resident Services Director

Nick Elzy
Resident Services Manager

Cynthia E. Zorn-Shaw
ROSS Service Coordinator

Kim Bean
21st CCLC Site Coordinator

Linda Willis
PH/FSS Coordinator

Dayen Valentine
S8/FSS Coordinator

**Housing Management
Board Report
June meeting 2013**

**Public Housing (PH), Housing Choice Voucher (HCV) and West Lake
Management Communities Reports**

- **Housing communities reports – Attached**
 1. **West Lake**
 2. **West Lake Addition**
 3. **Cecil Gober**
 4. **John Wright Homes**
 5. **Dakota Apartments**
 6. **Renaissance/Washington Ridge**
 7. **Villas at Lake Bonnet**
 8. **Colton Meadow**
 9. **The Manor at West Bartow**
- **Housing Choice Voucher Program - Attached**
 1. **Intake & Occupancy Report**
 2. **Housing Choice Voucher report**

The Housing Management staff received training on Low Income Housing Tax Credits.

The Manor at West Bartow

- The community staff in conjunction with LHA Resident services department had a successful cookout for the residents.

Washington Renaissance and Dakota Park

- Dakota Park was painted and the community also passed the Low Income Housing Tax Credit management audit and physical inspection.

Colton Meadows/Bonnet Shores Villas

- Colton Meadow was successful this month and passed their Low Income Housing Tax Credit management audit and physical inspection.

Public Housing

- Our tree cutting contractor finished cutting the trees at Cecil Gober and Westlake Apartments. We are still working in conjunction with the Development Department on the Cecil Gober rehabilitation project and other projects including but not limited to the HUD GPNA tool and inspection.

Housing Choice Voucher Program

- PIC Score is 100%.

Housing Choice Voucher Program Monthly Board Report May 2013

- **Tenant-Based Waitlist**

As of May 31, 2013, the Housing Choice Voucher tenant based waiting list contained four hundred ninety-seven (497) applicants.

- **VASH Waitlist**

As of May 31, 2013, the Veteran Affairs Supportive Housing waiting list contained one applicant.

- **Project-Based Waitlist – The Manor at West Bartow**

As of May 31, 2013, Lakeland Housing Authority project-based waiting list for the Manor at West Bartow contained forty-five (45) applicants.

- **Project-Based Waitlist – Villas at Lake Bonnet**

As of May 31, 2013, Lakeland Housing Authority project-based waiting list for the Villas at Lake Bonnet contained thirty-six (36) applicants.

- **Project-Based Waitlist - Habitat for Humanity**

As of July 31, 2012, Lakeland Housing Authority project-based waiting list for Habitat for Humanity contained no applicant.

HCV Program Information

- **Port Outs**

LHA currently has twenty-five (25) port-outs in the month of May. Port outs are clients that use their voucher in another jurisdiction. The total amount of Portable HAP payment for the month of April is \$18,702.50. This includes the Admin Fee of \$745.50.

- **Port Ins**

LHA currently has eighty-five (85) port-ins for the month of May. Port-ins is participants that transferred from another housing agency that we are billing for HAP and administrative fees.

- **Lease-up & Movers**

As of April 30, 2013, Lakeland Housing Authority issued four(4) vouchers to movers. We received nineteen (19) Requests for Tenancy Approvals during the month of May. We processed thirty-one (31) unit transfers, zero (0) initial move-in, and six (6) port-ins with a date effective in May.

- **Active Clients**

As of May 31, 2013, LHA is servicing 1223 families on the Housing Choice Voucher program. These families include 968 regular Housing Choice Voucher holders, 45 Mainstream Disabled Housing Vouchers, 49 VASH, 113 Project-Based Vouchers, 23 Tenant Protection Program (TenPro) and 25 Port-outs.

- **EOP – End of Participation**

LHA processed three (3) EOP's with a date effective the month of May. Below are the reasons for leaving the program:

Reason	Number
Termination – Criminal	0
Termination – Unreported income	3
Left w/out notice	0
No longer need S/8 Assistance	0
Deceased	0
Landlord Eviction	0
Lease Violations non-curable	0

*Continuous Commitment to SEMAP Certification of
a High Performing Program*

Housing Choice Voucher Program
Monthly Board Report
May 2013

• **Monthly HAP Analysis**

HAP disbursement for May 2013 was \$692,000.00 and Admin Fee paid to Receiving PHAs administering our vouchers was \$745.50.

• **PIC Reporting Percentage**

All Housing Authorities are required to submit information to HUD through the PIH Information Center (PIC). All transactions processed on the Housing Choice Voucher Program are submitted on a monthly basis to PIC. HUD requires a monthly reporting rate of 95%. Below is our current reporting rate for the Housing Choice Voucher program:

Effective Date	HCV	Date Collected
05/31/2013	100.41%	06/06/2013

• **General information and activities for the month of May**

- Out of eighty-two (82) scheduled annual re-certifications for the month of May; the Housing Choice Voucher Department processed all eighty-two (82) for recertification, non-renewals, unit transfers and/or termination.
- The Housing Choice Voucher program conducted thirteen (13) informal hearing in the month of May.

Property Name:

Management Report for the Month of:

20

Occupancy:

As of the last day of the month of _____, the community was ___% occupied.

Vacancy:

Vacant unit(s): ___

Turnover rate: ___%

YTD: ___

Move-out(s): ___

Current Rent(s):

- 1- One Bedroom = \$
- 2- Two Bedrooms = \$
- 3- Three Bedrooms = \$
- 4- Four Bedrooms = \$

Utilities:

Residents pay: _____

Maintenance:

Unit inspections: ___ Building inspections: ___

Vegetation is being trimmed weekly: ___yes ___no

Security:

Any incident reports? ___yes ___no

If yes, give an explanation:

Insurance Claims:

Any claims this month? ___yes ___no

If yes, give an explanation:

Management Referrals:

Late Rent: _____

Re-certifications:

Number completed for the current month: ____

Number in process for the next month: ____

Social Services:

Newsletter completed and distributed? ___yes ___no

Scheduled activities: _____

Sincerely,

Community Coordinator

Property Name:

Management Report for the Month of:

20

Occupancy:

As of the last day of the month of _____, the community was ___% occupied.

Vacancy:

Vacant unit(s): ___

Turnover rate: ___%

YTD: ___

Move-out(s): ___

Current Rent(s):

- 1- One Bedroom = \$
- 2- Two Bedrooms = \$
- 3- Three Bedrooms = \$
- 4- Four Bedrooms = \$

Utilities:

Residents pay: _____

Maintenance:

Unit inspections: ___ Building inspections: ___

Vegetation is being trimmed weekly: ___yes ___no

Security:

Any incident reports? ___yes ___no

If yes, give an explanation:

Insurance Claims:

Any claims this month? ___yes ___no

If yes, give an explanation:

Management Referrals:

Late Rent: _____

Re-certifications:

Number completed for the current month: ____

Number in process for the next month: ____

Social Services:

Newsletter completed and distributed? ___yes ___no

Scheduled activities: _____

Sincerely,

Community Coordinator

Property Name:

Management Report for the Month of:

20

Occupancy:

As of the last day of the month of _____, the community was ___% occupied.

Vacancy:

Vacant unit(s): ___

Turnover rate: ___%

YTD: ___

Move-out(s): ___

Current Rent(s):

- 1- One Bedroom = \$
- 2- Two Bedrooms = \$
- 3- Three Bedrooms = \$
- 4- Four Bedrooms = \$

Utilities:

Residents pay: _____

Maintenance:

Unit inspections: ___ Building inspections: ___

Vegetation is being trimmed weekly: ___yes ___no

Security:

Any incident reports? ___yes ___no

If yes, give an explanation:

Insurance Claims:

Any claims this month? ___yes ___no

If yes, give an explanation:

Management Referrals:

Late Rent: _____

Re-certifications:

Number completed for the current month: ____

Number in process for the next month: ____

Social Services:

Newsletter completed and distributed? ___yes ___no

Scheduled activities: _____

Sincerely,

Community Coordinator

Property Name:

Management Report for the Month of:

20

Occupancy:

As of the last day of the month of _____, the community was ___% occupied.

Vacancy:

Vacant unit(s): ___

Turnover rate: ___%

YTD: ___

Move-out(s): ___

Current Rent(s):

- 1- One Bedroom = \$
- 2- Two Bedrooms = \$
- 3- Three Bedrooms = \$
- 4- Four Bedrooms = \$

Utilities:

Residents pay: _____

Maintenance:

Unit inspections: ___ Building inspections: ___

Vegetation is being trimmed weekly: ___yes ___no

Security:

Any incident reports? ___yes ___no

If yes, give an explanation:

Insurance Claims:

Any claims this month? ___yes ___no

If yes, give an explanation:

Management Referrals:

Late Rent: _____

Re-certifications:

Number completed for the current month: ____

Number in process for the next month: ____

Social Services:

Newsletter completed and distributed? ___yes ___no

Scheduled activities: _____

Sincerely,

Community Coordinator

Property Name: Renaissance @ Washington Ridge
Management Report for the Month of: May 2013

Occupancy:

As of the last day of the month of May, the community was 94 % occupied.

Vacancy:

Vacant unit(s): 10

Turnover rate: 10 %

YTD: 50

Move-out(s): 7

Current Rent(s):

- 1- One Bedroom = \$ 495
- 2- Two Bedrooms = \$ 563
- 3- Three Bedrooms = \$ 637
- 4- Four Bedrooms = \$ 699

Utilities:

Residents pay: All their utilities. Senior building owner pays water, sewer and trash.

Maintenance:

Unit inspections: 0 Building inspections: 5

Vegetation is being trimmed weekly: xx yes no

Security:

Any incident reports? ___yes xxno

If yes, give an explanation:

Insurance Claims:

Any claims this month? ___yes xxno

If yes, give an explanation:

Management Referrals:

Late Rent: Management sent out late notices to all residents that had not paid rent by the 3rd and 10th of the month

Re-certifications:

Number completed for the current month: 17

Number in process for the next month: 13

Social Services:

Newsletter completed and distributed? ___yes xxno

Scheduled activities: Movie Day was held on May 23, 2013.

Sincerely,


Community Coordinator

Property Name: Dakota Park

Management Report for the Month of: May 2013

Occupancy:

As of the last day of the month of May, the community was 90 % occupied.

Vacancy:

Vacant unit(s): 4

Turnover rate: 8 %

YTD: 11

Move-out(s): 0

Current Rent(s):

- 1- One Bedroom = \$ NA
- 2- Two Bedrooms = \$ 587
- 3- Three Bedrooms = \$ 668
- 4- Four Bedrooms = \$ 734

Utilities:

Residents pay: All their utilities

Maintenance:

Unit inspections: 10 Building inspections: 6

Vegetation is being trimmed weekly: xx yes no

Security:

Any incident reports? ___yes xxno

If yes, give an explanation:

Insurance Claims:

Any claims this month? ___yes xxno

If yes, give an explanation:

Management Referrals:

Late Rent: Management sent out late notices to all residents that had not paid rent by the 3rd and 10th of the month

Re-certifications:

Number completed for the current month: 0

Number in process for the next month: 1

Social Services:

Newsletter completed and distributed? ___yes xxno

Scheduled activities: State Inspection was conducted on May 14, 2013 and we passed the inspection with no findings.

Sincerely,


Community Coordinator

Property Name:

Management Report for the Month of:

20

Occupancy:

As of the last day of the month of _____, the community was ___% occupied.

Vacancy:

Vacant unit(s): ___

Turnover rate: ___%

YTD: ___

Move-out(s): ___

Current Rent(s):

- 1- One Bedroom = \$
- 2- Two Bedrooms = \$
- 3- Three Bedrooms = \$
- 4- Four Bedrooms = \$

Utilities:

Residents pay: _____

Maintenance:

Unit inspections: ___ Building inspections: ___

Vegetation is being trimmed weekly: ___yes ___no

Security:

Any incident reports? ___yes ___no

If yes, give an explanation:

Insurance Claims:

Any claims this month? ___yes ___no

If yes, give an explanation:

Management Referrals:

Late Rent: _____

Re-certifications:

Number completed for the current month: ____

Number in process for the next month: ____

Social Services:

Newsletter completed and distributed? ___yes ___no

Scheduled activities: _____

Sincerely,

Community Coordinator

Property Name:

Management Report for the Month of:

20

Occupancy:

As of the last day of the month of _____, the community was ___% occupied.

Vacancy:

Vacant unit(s): ___

Turnover rate: ___%

YTD: ___

Move-out(s): ___

Current Rent(s):

- 1- One Bedroom = \$
- 2- Two Bedrooms = \$
- 3- Three Bedrooms = \$
- 4- Four Bedrooms = \$

Utilities:

Residents pay: _____

Maintenance:

Unit inspections: ___ Building inspections: ___

Vegetation is being trimmed weekly: ___yes ___no

Security:

Any incident reports? ___yes ___no

If yes, give an explanation:

Insurance Claims:

Any claims this month? ___yes ___no

If yes, give an explanation:

Management Referrals:

Late Rent: _____

Re-certifications:

Number completed for the current month: ____

Number in process for the next month: ____

Social Services:

Newsletter completed and distributed? ___yes ___no

Scheduled activities: _____

Sincerely,

Community Coordinator

**Housing Management
Board Report
June meeting 2013**

**Public Housing (PH), Housing Choice Voucher (HCV) and West Lake
Management Communities Reports**

- **Housing communities reports – Attached**
 1. **West Lake**
 2. **West Lake Addition**
 3. **Cecil Gober**
 4. **John Wright Homes**
 5. **Dakota Apartments**
 6. **Renaissance/Washington Ridge**
 7. **Villas at Lake Bonnet**
 8. **Colton Meadow**
 9. **The Manor at West Bartow**
- **Housing Choice Voucher Program - Attached**
 1. **Intake & Occupancy Report**
 2. **Housing Choice Voucher report**

The Housing Management staff received training on Low Income Housing Tax Credits.

The Manor at West Bartow

- The community staff in conjunction with LHA Resident services department had a successful cookout for the residents.

Washington Renaissance and Dakota Park

- Dakota Park was painted and the community also passed the Low Income Housing Tax Credit management audit and physical inspection.

Colton Meadows/Bonnet Shores Villas

- Colton Meadow was successful this month and passed their Low Income Housing Tax Credit management audit and physical inspection.

Public Housing

- Our tree cutting contractor finished cutting the trees at Cecil Gober and Westlake Apartments. We are still working in conjunction with the Development Department on the Cecil Gober rehabilitation project and other projects including but not limited to the HUD GPNA tool and inspection.

Housing Choice Voucher Program

- PIC Score is 100%.

Property Name: Manor @ West Bartow

Management Report for the Month of: May 2013

Occupancy:

As of the last day of the month of May, the community was 96 % occupied.

Vacancy:

Vacant unit(s): 3

Turnover rate: 3 %

YTD: 3

Move-out(s): 2

Current Rent(s):

- 1- One Bedroom = \$ 695
- 2- Two Bedrooms = \$ 801
- 3- Three Bedrooms = \$
- 4- Four Bedrooms = \$

Utilities:

Residents pay: Electric

Maintenance:

Unit inspections: Yes Building inspections: Yes

Vegetation is being trimmed weekly: xyes ___no

Security:

Any incident reports? ___yes no

If yes, give an explanation:

Insurance Claims:

Any claims this month? ___yes no

If yes, give an explanation:

Management Referrals:

Late Rent: none

Re-certifications:

Number completed for the current month: 2

Number in process for the next month: 3

Social Services:

Newsletter completed and distributed? yes ___no

Scheduled activities: movie and craft nights and bingo daily

Sincerely,

Jennifer Robinson

Community Coordinator

Investigative Board Report

May, 2013

1 Small Claims Court

- There was one small claim case made for the month of May. Received a Judgment in the amount of \$475.00 for damage caused to one of our apartments,

2 Eviction Court

- Three evictions were filed for the month of May. All three were from West Lake Management. Two were for non-payment of rent and one was for criminal activity.

3 Applicant Criminal Histories

- During the month of May thirty-five (35) criminal histories were processed for Public Housing applicants, **resulting in a net savings to the Lakeland Housing Authority of eight-hundred and five dollars.**

4 Public Housing Re-certification Criminal Histories

- For the month of May thirty (30) criminal histories were processed for Public housing, **resulting in a net savings of six-hundred and ninety dollars.**

5 Conflict Resolutions

- One for the month of May.

6 Public Housing Fraud Recovery

- None for the month of May

7 Repayment Agreements

- None for the month of May.

Section 8

1 Section 8 Terminations

- None for the month of May, however, we have some pending.

Type	Current	Pending	Closed
Un-Authorized Guest	1		1
Un-Reported Income		1	
Un-Guest / Income			
Drug Related Criminal Activity			
Totals	2	1	1

2 Section 8 Repayment Agreements

- No section 8 re-payment agreements were signed for the month of May.

3 Section 8 Fraud Recovery

- Figures are unavailable.

4 Criminal Court

- The Lakeland Housing Authority currently has three pending cases with the State Attorney's Office.

5 Section 8 Applicant Criminal Histories

- During the month of May, the Lakeland Housing Authority Investigations Department ran Thirty-five (35) criminal histories for Section 8 applicants. **This resulted in a net savings of eight hundred and five dollars.**

6 Section 8 Re-certification Criminal Histories

- During the month of May, we sat a L.H.A. record in the amount of criminal histories that were run for section 8 re-certification. Four hundred and twenty-three (423) section 8 re-certifications were submitted to Investigations, for a **total savings of Nine thousand seven hundred and twenty-nine dollars.**

7 Section 8 Hearings

- Investigators attended no section eight hearings for the month of May.

8 VASH

- Four (4) for the month of May, for a **total savings of ninety-two dollars.**

Administration

- The investigative unit processed five (5) backgrounds on a L.H.A. new-hires, **for a savings of one hundred and fifteen dollars.**

The Manor at West Bartow

- No criminal history re-certs were run for the month of May, **Five new applications backgrounds were completed for a savings of one hundred and fifteen dollars.**

Washington Renaissance and Dakota Park

- Four (4) new applications for criminal history were submitted for May, for the Renaissance/Washington Oaks property, resulting in a savings of **ninety-two dollars.** No applications submitted for recertification for the month of May.

Colton Meadow/Bonnet Shores Villas

- Three (3) criminal histories were processed for Colton Meadow, for the month of May, **for a savings of sixty-nine dollars.** We also completed five (5) applications for recertification for a savings of **one hundred and five dollars.** **Three (3) criminal histories were processed for new applications for a savings of sixty-nine dollars at the Bonnett Shores Property. In addition we processed six (6) applications for**

recertification for a savings of one hundred and thirty-five dollars.

Lincoln Square Apartments

- Periodic checks of the vacated property.

General

- During the month of May, we completed five (5) background checks for Lakeland Housing Authority employment, and attended several meetings. In addition we wrote ten (10) parking violations, one (1) vehicle was towed for failure to comply with the 24 hour notice. By having the Investigation Department process the criminal backgrounds in-house, the Lakeland Housing Authority has saved **Twelve thousand three hundred and twenty-nine dollars**, for the month of May. This figure is based upon the cost of twenty-three dollars per background check by outside information suppliers. This set a record for the amount of criminal histories processed in one month.