



## **REGULAR BOARD MEETING**

December 16, 2013

## AGENDA

Board of Commissioners Meeting  
The Housing Authority of the City of Lakeland, Florida  
Monday, December 16, 2013 at 6:00 P.M.  
LHA Board Room  
430 Hartsell Avenue  
Lakeland, Florida

Pledge of Allegiance

Moment of Silence

Establish a Quorum

1. **Approval of the Minutes of the Regular Board Meeting held Monday, November 18, 2013**
2. **Old Business**  
LHA Recovery Plan Update
3. **New Business**
4. **Monthly Reports**
  - Financial Reports and Grant Updates
  - Housing Report
  - Development Report
  - Resident Services Report
  - Resolutions
    - Resolution #13-1370** – The Board of Commissioners is requested to approve the resolution authorizing revisions of the current utility allowance schedule for Housing Choice Voucher participants.
    - Resolution #13-1371** – The Board of Commissioners is requested to approve the 2014 Annual Budget as presented by staff.
    - Resolution #13-1372** – The Board of Commissioners is requested to approve the above-referenced resolution to authorize the Executive Director to enter into a task order-driven, indefinite delivery, indefinite quantity contract with each: *Baker Tilly Virchow Krause, LLP; IFH Solutions, Inc.; and TAG Associates of Florida, LLC*
    - Resolution #13-1373** – The Board of Commissioners is requested to approve the two attached revisions to the Housing Authority of the City of Lakeland Employee Handbook.

**5. Secretary's Report**

**6. Legal Report**

**7. Other Business**

Executive Director Goals

**Public Forum**

**Adjournment**

**MINUTES**  
**Regular Board Meeting of**  
**The Housing Authority of the City of Lakeland**  
**November 18, 2013**

The Commissioners of the Housing Authority of the City of Lakeland met for a Regular Board Meeting on Monday, November 18, 2013 at 6:00 p.m. at Lakeland Housing Authority, 430 Hartsell Avenue Lakeland, Florida.

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

Legal Counsel Present:                 Ricardo Gilmore, Attorney  
  Rhonda Stringer, Attorney

LHA Staff Present:                       Benjamin J. Stevenson, Executive Director  
  Valerie Brown, Sr. Director of Development  
  Earl Haynes, Director of Resident Services  
  Carlos Pizarro, Director of Housing  
  Eva Hall, Director of Finance  
  Cesar Diaz, IT Operations Manager  
  Tom Hornack, Administrative Services Manager  
  Shauna Ginn, Asset Manager  
  Patrick Roberts, Human Resources Generalist  
  Brenda Goodman, Executive Administrative Coordinator

Guests:                                     Brain Nemeroff – Berman & Hopkins, CPA  
  Brunilda Roman – FSS Graduate

The Meeting was called to order at 6:00 p.m. by Commissioner Michael Pimentel, Chairman. Pledge of Allegiance and a moment of silence were observed.

A quorum was established.

Commissioner Dorothy Sanders – Excused Absence

Commissioner Pimentel adjusted the agenda to allow Mr. Earl Haynes, Director of Resident Services to present his report. Mr. Haynes was excused from the meeting to attend a City-Wide Community Meeting on Gang Violence for the City of Lakeland.

The Resident Services Report was submitted as written. In addition to the monthly report and accomplishments, the City Wide Resident Organization recently met in November 2013. The organization is very motivated. Additionally, they are working very diligently with Resident Services staff and will be providing holiday activities for the residents; a food drive and toys for tots.

### **APPROVAL/ACCEPTANCE OF MINUTES**

- **Motion to approve and accept the Minutes of the Regular Board Meeting held November 18, 2013.  
Richardson – 2<sup>nd</sup> Hall**

#### **Vote: Commissioner**

Michael Pimentel – Aye

Ellis Hirsch – Aye

Bernice Evans – Aye

Rev. Richard Richardson – Aye

Eddie Hall – Aye

Joseph DiCesare – Aye

### **OLD BUSINESS**

Mr. Benjamin Stevenson, Executive Director informed the board one of the commissioner has concerns with the CD's that are being used to copy the recorded board meetings. Specifically, CD's requested and received are not audible. This item was discussed in detail by the commissioners. Each CD that is prepared by the staff is tested for audibility prior to fulfilling the public record request.

Attorney Ricardo Gilmore also addressed the board regarding an ongoing matter of "How do you get a subject matter on the regular board meeting agenda?" Mr. Gilmore thoroughly explained to the board that the agenda is established by the Executive Director, in consultation with the Chairman of the Board of Commissioners. Mr. Gilmore further advised the board that at any meeting, any commissioner can discuss any issue they request to discuss and it does not have to be on the agenda. However, there are designated and appropriate places to bring up a requested matter to be discussed.

Mr. Gilmore also deliberated with the board the matter of sending emails and communication between the Commissioners are provided for Florida's Government-in-the-Sunshine Law under certain circumstances. When communicating via email it is extremely easy to violate the Sunshine Law. Once a commissioner sends an email, it becomes public record and the wording of the communication can cause it to be in violation. Each commissioner voiced their concerns and a vote was taken regarding their decision not to receive emails from fellow commissioners.

The Board gave much discussion regarding the employee goals and evaluation criteria's for the Executive Director. Mr. Gilmore agreed to develop and share a criteria list of goals with Chairman Pimentel. Commissioner Richardson also agreed to contribute a criteria list for Mr. Gilmore to further review.

## **NEW BUSINESS**

### **FSS Graduate**

Chairman Pimentel presented the Certificate of Completion and stipend to recent FSS Graduate, Brunilda Roman. Ms. Roman is a single mother raising four children. She accomplished her goals of obtaining employment in a career path that empowered her to remain independent of cash assistance; obtained child care assistance purchase reliable transportation, and earned her BS Degree.

### **Financial Audit Presentation**

Mr. Brain Nemeroff, CPA Partner – Berman Hopkins, presented The Annual Financial Audit ending December 30, 2012. The audit covered three areas; Financials, Controls and Compliances (Single Audit). The Financial includes all programs and projects (not the LLLP's). Mr. Nemeroff handed out a condensed written summary of his report and their findings to the board along with a more detailed binder report of the audit.

### **Monthly Reports**

- **Financial Report** – Eva Hall gave a thorough Financial Report. Highlights of Ms. Hall's report included some of the issues that were presented by Brain Nemeroff, CPA in the audit findings. Ms. Hall advised the board that staff is currently working with HUD to correct these matters.

Mr. Stevenson advised the board that the agency is taking steps to address and correct the findings through The Corrective Action Plan approved by HUD. Updates on the Corrective Action Plan are included in each Board Report packet.

- **Housing Report** – Submitted as written
- **Development Report** – Submitted as written  
Ms. Valerie Brown, Director of Development, stated HUD approved the Homeownership Plan for Hampton Hills on November 14, 2013.
- **Legal Report** –  
See comments under Old Business

**RESOLUTIONS**

**Resolution #13-1368 – Resolution withdrawn.** The Board requested a list of services to be provided and included in the December Secretary’s Report.

**Resolution #13-1369** – The Board of Commissioners is requested to approve the above-referenced resolution to authorize the Executive Director to enter into a contract with *Non-Profit Insurance Services, Inc.*, to provide Workers’ Compensation Coverage.

**Motion to approve Resolution # 13-1366 – The Board of Commissioners**

Richardson – 2<sup>nd</sup> Hirsch

**Vote:** Commissioner

Michael Pimentel –Aye

Rev. Richard Richardson – Aye

Bernice Evans – Aye

Ellis Hirsch – Aye

Eddie Hall – Aye

Joseph DiCesare – Aye

**PUBLIC FORUM**

None

**SECRETARY REPORT -**

Submitted as written

**OTHER BUSINESS**

None

Meeting adjourned at 9:05 p.m.

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**Benjamin J. Stevenson, Secretary**



TO: Lakeland Housing Authority Finance Committee  
FROM: Eva Hall, LHA Director of Finance  
DATE: December 6, 2013  
RE: October 2013 Financial Statements

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

1. Central Office Cost Center (COCC)
2. Housing Choice Voucher Program (Section 8)
3. Public Housing Program (AMP 1)
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 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 Ten Months Ended October 31, 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%	253	-	253	100.00%	-
Management & Admin Income	29,534	18,933	1,326	7.00%	211,869	189,333	22,536	11.90%	<b>227,200</b>
<b>Total Revenue</b>	<b>29,534</b>	<b>18,933</b>	<b>10,601</b>	<b>55.99%</b>	<b>212,122</b>	<b>189,333</b>	<b>22,789</b>	<b>12.04%</b>	<b>227,200</b>
Administrative Expenses	73,509	99,833	(26,324)	-26.37%	792,101	992,321	(200,220)	-20.18%	<b>1,198,000</b>
Utility Expense	2,138	1,507	631	41.90%	19,187	15,067	4,120	27.34%	<b>18,080</b>
Maintenance Expense	3,582	1,175	2,407	204.85%	26,854	11,750	15,104	128.54% <sup>1</sup>	<b>14,100</b>
General Expenses	212	925	(713)	-77.08%	13,438	9,250	4,188	45.28%	<b>11,100</b>
Depreciation	133	146	(13)	-8.80%	1,332	1,458	(126)	-8.64%	<b>1,750</b>
<b>Total Expense</b>	<b>79,574</b>	<b>103,586</b>	<b>(24,012)</b>	<b>-23.18%</b>	<b>852,912</b>	<b>1,029,846</b>	<b>(176,934)</b>	<b>-17.18%</b>	<b>1,243,030</b>
<b>Net Operating Income (Loss)</b>	<b>(50,040)</b>	<b>(84,653)</b>	<b>34,613</b>	<b>-40.89%</b>	<b>(640,790)</b>	<b>(840,513)</b>	<b>199,723</b>	<b>-23.76%</b>	<b>(1,015,830)</b>
<b>Allocation Required from Non-Federal Funds</b>	<b>50,040</b>	<b>84,653</b>	<b>(34,613)</b>	<b>-40.89%</b>	<b>640,790</b>	<b>840,513</b>	<b>(199,723)</b>	<b>-23.76% <sup>2</sup></b>	<b>1,021,180</b>
									<b>5,350</b>

**Comments**

- <sup>1</sup> Maintenance Expense includes unplanned repairs at central office.
- <sup>2</sup> Allocation of Non-Federal funds has not been provided.

**Lakeland Housing Authority  
Central Office Cost Center  
Balance Sheet  
October 31, 2013**

<b>Assets</b>	<b>Liabilities and Net Assets</b>
Current Assets	Liabilities
Prepaid Expense	Current Liabilities
10,013	Accounts Payable
Total Current Assets	Due to Master Cash Account
10,013	Accr Compensated Absences
	2,391
	2,569,141
	42,818
	<b>Total Liabilities</b>
	<b>2,614,350</b>
Other Assets	Net Assets
Property & Equipment	Unrestricted Net Assets
33,769	(2,573,897)
Accumulated Depreciation	
(3,329)	
Total Other Assets	
30,440	
	<b>Total Net Assets</b>
	<b>(2,573,897)</b>
<b>Total Assets</b>	<b>Total Liabilities and Net Assets</b>
<b>40,453</b>	<b>40,453</b>

**Lakeland Housing Authority**  
**Section 8 Housing Choice Voucher Program**  
**Statement of Operations**  
**For the Ten Months Ended October 31, 2013**

	<b>Current Month</b>				<b>Year to Date</b>				<b>Annual Budget</b>
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
HAP/Administrative Revenue	656,534	897,694	(241,160)	-26.86%	8,377,497	8,966,682	(589,185)	-6.57%	<b>10,772,326</b>
Other Income	10	9	1	9.09%	591	92	499	542.39%	<b>110</b>
<b>Total Revenue</b>	<b>656,544</b>	<b>897,703</b>	<b>(241,159)</b>	<b>-26.86%</b>	<b>8,378,088</b>	<b>8,966,774</b>	<b>(588,686)</b>	<b>-6.57%</b>	<b>10,772,436</b>
Administrative Expenses	54,918	67,255	(12,337)	-18.34%	603,237	670,361	(67,124)	-10.01%	<b>807,055</b>
Utility Expense	354	375	(21)	-5.60%	3,389	3,750	(361)	-9.63%	<b>4,500</b>
Maintenance Expense	10,168	538	9,630	1791.13%	14,790	5,387	9,403	174.55%	<b>6,452</b>
General Expenses (Insurance, etc)	-	117	(117)	-100.00%	1,090	1,190	(100)	-8.40%	<b>1,398</b>
Housing Assistance Payments	761,570	802,077	(40,507)	-5.05%	7,661,621	7,999,119	(337,498)	-4.22%	<b>9,624,919</b>
Depreciation	315	350	(35)	-10.00%	3,150	3,500	(350)	-10.00%	<b>4,200</b>
<b>Total Expense</b>	<b>827,325</b>	<b>870,710</b>	<b>(43,385)</b>	<b>-4.98%</b>	<b>8,287,277</b>	<b>8,683,307</b>	<b>(396,030)</b>	<b>-4.56%</b>	<b>10,448,524</b>
<b>Net Operating Income (Loss)</b>	<b>(170,781)</b>	<b>26,993</b>	<b>(197,774)</b>	<b>-732.69%</b>	<b>90,811</b>	<b>283,467</b>	<b>(192,656)</b>	<b>-67.96%</b>	<b>323,912</b>

**Lakeland Housing Authority**  
**Section 8 Housing Choice Voucher Program**  
**Balance Sheet**  
**October 31, 2013**

<b>Assets</b>		<b>Liabilities and Equity</b>	
Current Assets		Liabilities	
Cash - Operating	159,159	Current Liabilities	
Cash - HAP	313,479	Due to Master Cash Account	381,884
Cash - FSS Escrow	110,004	Accr Compensated Absences	15,997
Accounts Receivable - Other Housing Authorities	27,524	FSS Escrow Liability	101,325
Accounts Receivable - Repayment Agreements	28,497		
Allow for Doubtful A/R	(28,497)	<b>Total Liabilities</b>	<b>499,206</b>
Other Current Assets	41,905		
Total Current Assets	652,071		
		Net Assets	
Other Assets		Net Assets	170,821
Furniture & Fixtures	28,867		
Accumulated Depreciation	(10,911)	<b>Total Equity</b>	<b>170,821</b>
Total Other Assets	17,956		
<b>Total Assets</b>	<b>670,027</b>	<b>Total Liabilities and Equity</b>	<b>670,027</b>

**Lakeland Housing Authority  
Public Housing (AMP 1)  
Statement of Operations  
For the Ten Months Ended October 31, 2013**

	<b>Current Month</b>				<b>Year to Date</b>				<b>Annual Budget</b>
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
Rental Income	25,059	24,500	559	2.28%	199,003	220,500	(21,497)	-9.75%	<b>294,000</b>
Other Tenant Income	769	738	31	4.20%	8,291	6,638	1,653	24.90%	<b>8,850</b>
Government Subsidy Income	47,803	65,092	(17,289)	-26.56%	481,781	585,824	(104,043)	-17.76%	<b>781,098</b>
Interest Income Restricted	2,818	20,750	(17,932)	-86.42%	25,435	186,750	(161,315)	-86.38% <sup>1</sup>	<b>249,000</b>
Other Income	288	1,316	(1,028)	-78.12%	12,506	11,850	656	5.54%	<b>15,800</b>
<b>Total Revenue</b>	<b>76,737</b>	<b>112,396</b>	<b>(35,659)</b>	<b>-31.73%</b>	<b>727,016</b>	<b>1,011,562</b>	<b>(284,546)</b>	<b>-28.13%</b>	<b>1,348,748</b>
Administrative Expenses	31,198	43,735	(12,537)	-28.67%	312,595	393,613	(81,018)	-20.58%	<b>524,818</b>
Tenant Services Expenses	137	1,225	(1,088)	-88.82%	3,946	11,025	(7,079)	-64.21%	<b>14,700</b>
Utility Expense	7,736	6,958	778	11.18%	62,717	62,625	92	0.15%	<b>83,500</b>
Maintenance Expense	17,592	37,723	(20,131)	-53.36%	228,079	339,502	(111,423)	-32.82%	<b>452,671</b>
General Expenses	16,784	6,056	10,728	177.15%	87,890	54,502	33,388	61.26% <sup>2</sup>	<b>72,670</b>
Housing Assistance Payments	4,578	2,875	1,703	59.23%	32,476	25,875	6,601	25.51%	<b>34,500</b>
Depreciation	66,917	66,917	0	0.00%	602,250	602,250	-	0.00%	<b>803,000</b>
<b>Total Expense</b>	<b>144,942</b>	<b>165,488</b>	<b>(20,546)</b>	<b>-12.42%</b>	<b>1,329,953</b>	<b>1,489,392</b>	<b>(159,439)</b>	<b>-10.70%</b>	<b>1,985,859</b>
<b>Net Operating Income (Loss)</b>	<b>(68,205)</b>	<b>(53,092)</b>	<b>(15,113)</b>	<b>28.47%</b>	<b>(602,937)</b>	<b>(477,830)</b>	<b>(125,107)</b>	<b>26.18%</b>	<b>(637,111)</b>

**Comments**

- <sup>1</sup> Interest income reduced due to receipt of principal payment from Bonnet Shores.
- <sup>2</sup> Increased insurance expense and increased bad debt expense.

**Lakeland Housing Authority  
Public Housing (AMP 1)  
Balance Sheet  
October 31, 2013**

**Assets**

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Current Assets	
Cash - Unrestricted	823,999
Cash - Restricted	40,795
Accounts Receivable	11,724
Allowance for Doubtful Accounts	(5,080)
Due from Other Programs	4,071,607
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	13,092
Other Current Assets	<u>226,775</u>
Total Current Assets	<u>6,946,634</u>
Other Assets	
Property & Equipment	12,458,026
Accumulated Depreciation	<u>(8,736,636)</u>
Total Other Assets	<u>3,721,390</u>
<b>Total Assets</b>	<b><u><u>10,668,024</u></u></b>

**Liabilities and Equity**

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Liabilities	
Current Liabilities	
Accounts Payable	5,389
Tenant Security Deposits	53,505
Accrued PILOT	30,640
Accrued Audit Fees	42,182
Tenant Prepaid Rent	4,859
Accr Compensated Absences Current	<u>3,170</u>
Total Current Liabilities	<u>139,745</u>
Other Liabilities	
Accr Compensated Absences - LT	12,453
FSS Liability	<u>40,069</u>
Total Other Liabilities	<u>52,522</u>
<b>Total Liabilities</b>	<b><u><u>192,267</u></u></b>
Equity	
Net Assets	10,475,757
<b>Total Equity</b>	<b><u><u>10,475,757</u></u></b>
<b>Total Liabilities and Equity</b>	<b><u><u>10,668,024</u></u></b>

**Lakeland Housing Authority  
Dakota Park Limited Partnership, LLLP  
d/b/a Carrington Place  
Statement of Operations  
For the Ten Months Ended October 31, 2013**

	<b>Current Month</b>				<b>Year to Date</b>				<b>Annual Budget</b>
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
Rental Income	10,438	9,196	1,242	13.51%	96,212	91,958	4,254	4.63%	<b>110,350</b>
Other Tenant Income	491	430	61	14.08%	2,778	4,304	(1,526)	-35.46%	<b>5,165</b>
Government Subsidy	5,801	7,072	(1,271)	-17.97%	58,143	70,717	(12,574)	-17.78%	<b>84,860</b>
Other Income	1	8	(7)	-87.37%	25	79	(54)	-68.35%	<b>95</b>
<b>Total Revenue</b>	<b>16,731</b>	<b>16,706</b>	<b>25</b>	<b>0.15%</b>	<b>157,158</b>	<b>167,058</b>	<b>(9,900)</b>	<b>-5.93%</b>	<b>200,470</b>
Administrative Expenses	3,308	4,720	(1,412)	-29.92%	40,712	48,403	(7,691)	-15.89%	<b>58,245</b>
Tenant Services Expense	19	42	(23)	-54.76%	73	417	(344)	-82.49%	<b>500</b>
Utility Expense	534	1,520	(986)	-64.87%	17,109	15,200	1,909	12.56%	<b>18,240</b>
Maintenance Expense	2,852	3,426	(574)	-16.75%	35,552	35,383	169	0.48%	<b>42,611</b>
General Expenses	-	1,905	(1,905)	-100.00%	15,091	19,047	(3,956)	-20.77%	<b>22,856</b>
Housing Assistance Payments	1,749	1,292	457	35.37%	16,753	12,917	3,836	29.70%	<b>15,500</b>
Financing Expenses	8,087	8,163	(76)	-0.93%	80,173	81,627	(1,454)	-1.78%	<b>97,952</b>
Depreciation & Amortization	2,199	7,648	(5,449)	-71.25% <sup>1</sup>	21,988	76,475	(54,487)	-71.25% <sup>1</sup>	<b>91,770</b>
<b>Total Expense</b>	<b>18,748</b>	<b>28,715</b>	<b>(9,967)</b>	<b>-34.71%</b>	<b>227,451</b>	<b>289,469</b>	<b>(62,018)</b>	<b>-21.42%</b>	<b>347,674</b>
<b>Net Operating Income (Loss)</b>	<b>(2,017)</b>	<b>(12,009)</b>	<b>9,992</b>	<b>-83.20%</b>	<b>(70,293)</b>	<b>(122,411)</b>	<b>52,118</b>	<b>-42.58%</b>	<b>(147,204)</b>
Reserve for Replacements	-	-	-	N/A	38,400	-	38,400	N/A <sup>2</sup>	-

**Comments**

- <sup>1</sup> Depreciation Expense budget is too high.
- <sup>2</sup> Reserve for Replacements Cash has been used for repair of parking lot and painting of property.

**Lakeland Housing Authority**  
**Dakota Park Limited Partnership, LLLP**  
**d/b/a Carrington Place**  
**Balance Sheet**  
**October 31, 2013**

<b>Assets</b>	<b>Liabilities and Equity</b>
<p>Current Assets</p> <p style="padding-left: 20px;">Cash - Unrestricted 18,783</p> <p style="padding-left: 20px;">Cash - Restricted 57,204</p> <p style="padding-left: 20px;">Accounts Receivable - Tenants 10,716</p> <p style="padding-left: 20px;">Allow for Doubtful A/R - Tenants (8,340)</p> <p style="padding-left: 20px;">Prepaid Expense 12,620</p> <p style="padding-left: 20px;">Other Current Assets 8,599</p> <hr style="border: 0.5px solid black;"/> <p>Total Current Assets 99,582</p> <p>Other Assets</p> <p style="padding-left: 20px;">Property &amp; Equipment 926,991</p> <p style="padding-left: 20px;">Accumulated Depreciation (40,936)</p> <hr style="border: 0.5px solid black;"/> <p style="padding-left: 20px;">886,055</p> <p style="padding-left: 20px;">Intangible Assets 71,725</p> <p style="padding-left: 20px;">Accumulated Amortization (32,746)</p> <hr style="border: 0.5px solid black;"/> <p style="padding-left: 20px;">38,979</p> <hr style="border: 0.5px solid black;"/> <p>Total Other Assets 925,034</p>	<p>Liabilities</p> <p>Current Liabilities</p> <p style="padding-left: 20px;">Accounts Payable -</p> <p style="padding-left: 20px;">Tenant Security Deposits 8,646</p> <p style="padding-left: 20px;">Accrued Audit Fees 8,283</p> <p style="padding-left: 20px;">Due to West Lake Management 96,626</p> <p style="padding-left: 20px;">Accr Compensated Absences Current 870</p> <hr style="border: 0.5px solid black;"/> <p>Total Current Liabilities 114,425</p> <p>Other Liabilities</p> <p style="padding-left: 20px;">Accrued Interest - HOPE VI 517,939</p> <p style="padding-left: 20px;">Accrued Developer Fee 149,860</p> <p style="padding-left: 20px;">Accr Compensated Absences - LT 1,616</p> <p style="padding-left: 20px;">FSS Escrow Liability 24,489</p> <p style="padding-left: 20px;">Due to Partner 124,954</p> <p style="padding-left: 20px;">Loan Payable - HOPE VI 714,591</p> <p style="padding-left: 20px;">Loan Payable - SunTrust 369,471</p> <p style="padding-left: 20px;">Loan Payable - LHA 101,380</p> <hr style="border: 0.5px solid black;"/> <p>Total Other Liabilities 2,004,300</p> <p><b>Total Liabilities</b> <b>2,118,725</b></p> <hr style="border: 0.5px solid black;"/> <p>Equity</p> <p style="padding-left: 20px;">Partners' Equity (1,094,109)</p> <hr style="border: 0.5px solid black;"/> <p><b>Total Equity</b> <b>(1,094,109)</b></p> <p><b>Total Liabilities and Equity</b> <b>1,024,616</b></p> <hr style="border: 0.5px solid black;"/>
<p><b>Total Assets</b> <b>1,024,616</b></p> <hr style="border: 0.5px solid black;"/>	<p><b>Total Liabilities and Equity</b> <b>1,024,616</b></p> <hr style="border: 0.5px solid black;"/>



**Lakeland Housing Authority  
Colton Meadow, LLLP  
Statement of Operations  
For the Ten Months Ended October 31, 2013**

	<b>Current Month</b>				<b>Year to Date</b>				<b>Annual Budget</b>
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
Rental Income	43,818	43,125	693	1.61%	438,076	431,250	6,826	1.58%	<b>517,500</b>
Other Tenant Income	1,255	1,663	(408)	-24.53%	11,723	16,629	(4,906)	-29.50%	<b>19,955</b>
Other Income	2	2	(0)	-3.85%	198	21	177	842.86%	<b>25</b>
<b>Total Revenue</b>	<b>45,075</b>	<b>44,790</b>	<b>285</b>	<b>0.64%</b>	<b>449,997</b>	<b>447,900</b>	<b>2,097</b>	<b>0.47%</b>	<b>537,480</b>
Administrative Expense	10,887	12,150	(1,263)	-10.40%	103,569	121,624	(18,055)	-14.84%	<b>145,805</b>
Tenant Services	-	125	(125)	-100.00%	571	1,250	(679)	-54.32%	<b>1,500</b>
Utility Expense	6,212	5,833	379	6.49%	53,936	58,333	(4,397)	-7.54%	<b>70,000</b>
Maintenance Expense	8,485	10,002	(1,517)	-15.16%	77,705	99,711	(22,006)	-22.07%	<b>120,020</b>
General Expense	7,876	6,939	937	13.51%	83,249	69,388	13,861	19.98% <sup>1</sup>	<b>83,265</b>
Financing Expense	4,658	7,515	(2,857)	-38.02%	41,902	75,153	(33,251)	-44.24% <sup>2</sup>	<b>90,184</b>
Depreciation & Amortization Expense	38,937	38,937	(0)	0.00%	389,373	389,373	-	0.00%	<b>467,247</b>
<b>Total Expense</b>	<b>77,055</b>	<b>81,502</b>	<b>(4,447)</b>	<b>-5.46%</b>	<b>750,305</b>	<b>814,832</b>	<b>(64,527)</b>	<b>-7.92%</b>	<b>978,021</b>
<b>Net Operating Income (Loss)</b>	<b>(31,980)</b>	<b>(36,712)</b>	<b>4,732</b>	<b>-12.89%</b>	<b>(300,308)</b>	<b>(366,932)</b>	<b>66,624</b>	<b>-18.16%</b>	<b>(440,541)</b>

**Comments**

- <sup>1</sup> General Expenses are over budget due to increases in insurance premiums, real estate taxes and bad debts.
- <sup>2</sup> Budget for Interest Expense on LHA Mortgage is too high due to a large principal payment made.

**Lakeland Housing Authority**  
**Colton Meadow, LLLP**  
**Balance Sheet**  
**October 31, 2013**

<b>Assets</b>		<b>Liabilities and Equity</b>	
<b>Current Assets</b>		<b>Liabilities</b>	
Cash - Unrestricted	581,580	<b>Current Liabilities</b>	
Cash - Security Deposits	22,175	Accounts Payable	11,188
Cash - Reserves and Escrow	1,000,748	Tenant Security Deposits	22,175
Accounts Receivable - Tenants	22,127	Accrued Interest Payable	10,526
Allow for Doubtful A/R - Tenants	(17,593)	Accrued Property Taxes	30,576
Prepaid Expense	46,898	Accrued Audit Fees	7,225
Other Current Assets	139,246	Due to West Lake Management	7,844
<b>Total Current Assets</b>	<b>1,795,181</b>	Tenant Prepaid Rent	1,384
		Accr Compensated Absences Current	604
		<b>Total Current Liabilities</b>	<b>91,522</b>
<b>Other Assets</b>		<b>Other Liabilities</b>	
Property & Equipment	12,156,799	Accr Compensated Absences - LT	1,122
Accumulated Depreciation	(1,284,743)	Mortgage Note Payable	450,845
	<b>10,872,056</b>	Mortgage - TCAP	1,231,424
		Mortgage - FHFC	8,710,185
Tax Credit and Monitoring Fees	208,695	Mortgage - HOME	115,900
Accumulated Amortization	(39,419)	Developer Fee Payable	1,639,667
	<b>169,276</b>	<b>Total Other Liabilities</b>	<b>12,149,143</b>
<b>Total Other Assets</b>	<b>11,041,332</b>	<b>Total Liabilities</b>	<b>12,240,666</b>
		Equity	
		Partners' Equity	595,847
		<b>Total Equity</b>	<b>595,847</b>
<b>Total Assets</b>	<b>12,836,513</b>	<b>Total Liabilities and Equity</b>	<b>12,836,513</b>

**Lakeland Housing Authority  
Bonnet Shores, LLLP  
Statement of Operations  
For the Ten Months Ended October 31, 2013**

	<b>Current Month</b>				<b>Year to Date</b>				<b>Annual Budget</b>
	Actual	Budget	\$ Variance	% Variance	Actual	Budget	\$ Variance	% Variance	
Rental Income	50,086	51,998	(1,912)	-3.68%	491,576	519,983	(28,407)	-5.46%	<b>623,980</b>
Other Tenant Income	585	971	(386)	-39.74%	13,189	9,708	3,481	35.86%	<b>11,650</b>
Other Income	10	1	9	1392.54%	20	7	13	185.71%	<b>8</b>
<b>Total Revenue</b>	<b>50,681</b>	<b>52,970</b>	<b>(2,289)</b>	<b>-4.32%</b>	<b>504,785</b>	<b>529,698</b>	<b>(24,913)</b>	<b>-4.70%</b>	<b>635,638</b>
Administrative Expense	10,598	11,879	(1,281)	-10.78%	105,812	118,882	(13,070)	-10.99%	<b>142,546</b>
Tenant Services	10	125	(115)	-92.00%	213	1,250	(1,037)	-82.96%	<b>1,500</b>
Utility Expense	5,292	4,375	917	20.96%	45,248	43,750	1,498	3.42%	<b>52,500</b>
Maintenance Expense	7,590	8,924	(1,334)	-14.95%	74,123	88,934	(14,811)	-16.65%	<b>107,085</b>
General Expense	9,518	6,654	2,864	43.04%	86,281	66,542	19,739	29.66% <sup>1</sup>	<b>79,850</b>
Financing Expense	11,596	14,709	(3,113)	-21.16%	102,400	147,085	(44,685)	-30.38% <sup>2</sup>	<b>176,502</b>
Depreciation & Amortization Expense	47,465	47,465	-	0.00%	474,648	474,648	-	0.00%	<b>569,578</b>
<b>Total Expense</b>	<b>92,069</b>	<b>94,130</b>	<b>(2,061)</b>	<b>-2.19%</b>	<b>888,725</b>	<b>941,091</b>	<b>(52,366)</b>	<b>-5.56%</b>	<b>1,129,561</b>
<b>Net Operating Income (Loss)</b>	<b>(41,388)</b>	<b>(41,160)</b>	<b>(228)</b>	<b>0.55%</b>	<b>(383,940)</b>	<b>(411,393)</b>	<b>27,453</b>	<b>-6.67%</b>	<b>(493,923)</b>

**Comments**

- 1 Fluctuation from General Expense budget is primarily due to underestimated Insurance Expense, \$13,298 (46.66%) over budget YTD, Real Estate Taxes, \$4,117 (11.9%) over budget and Bad Debt Expense \$8,778 (263.34%) over budget YTD.
- 2 Budget for Interest Expense on LHA Mortgage is too high due to a large principal payment made in January 2013.

**Lakeland Housing Authority**  
**Bonnet Shores, LLLP**  
**Balance Sheet**  
**October 31, 2013**

<b>Assets</b>		<b>Liabilities and Equity</b>	
Current Assets		Liabilities	
Cash - Unrestricted	111,748	Current Liabilites	
Cash - Restricted Deposits & Escrow	157,167	Accounts Payable	4,233
Operating Deficit Reserve	460,095	Tenant Security Deposits	22,700
Accounts Receivable - Tenants	18,027	Accrued Interest Payable	95,174
Allow for Doubtful A/R - Tenants	(13,895)	Accrued Property Taxes	38,700
Prepaid Expense	40,621	Accrued Audit Fees	7,775
Other Current Assets	124,165	Due to West Lake Management	8,171
Total Current Assets	897,928	Tenant Prepaid Rent	378
		Accr Compensated Absences	1,761
		Total Current Liabilities	178,892
Other Assets		Other Liabilities	
Property & Equipment	12,873,996	TCAP Mortgage	3,819,255
Accumulated Depreciation	(1,561,357)	HOME Loan	131,028
	11,312,639	LHA Mortgage	1,009,877
		Developer Fee Payable	450,000
Intangible Assets	288,008	Total Other Liabilities	5,410,160
Accumulated Amortization	(52,450)		
	235,558	<b>Total Liabilities</b>	<b>5,589,052</b>
Total Other Assets	11,548,197	Equity	
		Partners' Equity	6,857,073
		<b>Total Equity</b>	<b>6,857,073</b>
<b>Total Assets</b>	<b>12,446,125</b>	<b>Total Liabilities and Equity</b>	<b>12,446,125</b>

**Lakeland Housing Authority  
West Bartow Partnership, Ltd., LLLP  
Statement of Operations  
For the Ten Months Ended October 31, 2013**

	<b>Current Month</b>				<b>Year to Date</b>				<b>Annual</b>
	<b>Actual</b>	<b>Budget</b>	<b>\$ Variance</b>	<b>% Variance</b>	<b>Actual</b>	<b>Budget</b>	<b>\$ Variance</b>	<b>% Variance</b>	<b>Budget</b>
Rental Income	71,236	66,542	4,694	7.05%	725,507	665,417	60,090	9.03%	<b>798,500</b>
Other Tenant Income	290	271	19	7.01%	3,101	2,712	389	14.34%	<b>3,254</b>
Other Income	84	100	(16)	-16.00%	951	1,000	(49)	-4.90%	<b>1,200</b>
<b>Total Revenue</b>	<b>71,610</b>	<b>66,913</b>	<b>4,697</b>	<b>7.02%</b>	<b>729,559</b>	<b>669,129</b>	<b>60,430</b>	<b>9.03%</b>	<b>802,954</b>
Administrative Expenses	13,768	15,713	(1,945)	-12.38%	143,211	156,520	(13,309)	-8.50%	<b>188,555</b>
Tenants Service Expenses	-	208	(208)	-100.00%	641	2,083	(1,442)	-69.23%	<b>2,500</b>
Utility Expense	9,062	10,392	(1,330)	-12.80%	93,623	103,920	(10,297)	-9.91%	<b>124,704</b>
Maintenance Expense	4,411	11,908	(7,497)	-62.96%	92,676	118,505	(25,829)	-21.80%	<b>142,890</b>
General Expenses	4,387	4,171	217	5.19%	40,612	41,705	(1,093)	-2.62%	<b>50,046</b>
Financing Expenses	23,440	19,949	3,491	17.50% <sup>1</sup>	241,986	199,492	42,494	21.30% <sup>1</sup>	<b>239,390</b>
Depreciation & Amortization	41,940	41,803	137	0.33%	419,400	418,033	1,367	0.33%	<b>501,640</b>
<b>Total Expense</b>	<b>97,008</b>	<b>104,144</b>	<b>(7,136)</b>	<b>-6.85%</b>	<b>1,032,149</b>	<b>1,040,258</b>	<b>(8,109)</b>	<b>-0.78%</b>	<b>1,249,725</b>
<b>Net Operating Income (Loss)</b>	<b>(25,398)</b>	<b>(37,231)</b>	<b>11,833</b>	<b>-31.78%</b>	<b>(302,590)</b>	<b>(371,129)</b>	<b>68,539</b>	<b>-18.47%</b>	<b>(446,771)</b>

**Comments**

<sup>1</sup> Financing Expense budget does not include interest expense on developer fee payable. Expense = \$46,427 YTD

**Lakeland Housing Authority**  
**West Bartow Partnership, Ltd., LLLP**  
**Balance Sheet**  
**October 31, 2013**

<b>Assets</b>	<b>Liabilities and Equity</b>
<p>Current Assets</p> <p style="padding-left: 20px;">Cash - Unrestricted 76,908</p> <p style="padding-left: 20px;">Cash - Security Deposits 8,225</p> <p style="padding-left: 20px;">Cash - Reserves &amp; Escrow 396,870</p> <p style="padding-left: 20px;">Accounts Receivable - Tenants 4,224</p> <p style="padding-left: 20px;">Allow for Doubtful A/R - Tenants (1,134)</p> <p style="padding-left: 20px;">Prepaid Expense 40,205</p> <p style="padding-left: 20px;">Other Current Assets 85</p> <hr style="border: 0.5px solid black;"/> <p>Total Current Assets 525,383</p> <p>Other Assets</p> <p style="padding-left: 20px;">Property &amp; Equipment 15,099,032</p> <p style="padding-left: 20px;">Accumulated Depreciation (2,039,978)</p> <hr style="border: 0.5px solid black;"/> <p style="padding-left: 20px;">13,059,054</p> <p style="padding-left: 20px;">Intangible Assets 535,679</p> <p style="padding-left: 20px;">Accumulated Amortization (138,611)</p> <hr style="border: 0.5px solid black;"/> <p style="padding-left: 20px;">397,068</p> <hr style="border: 0.5px solid black;"/> <p>Total Other Assets 13,456,122</p> <hr style="border: 0.5px solid black;"/> <p><b>Total Assets 13,981,505</b></p>	<p>Liabilities</p> <p style="padding-left: 20px;">Accounts Payable 9,695</p> <p style="padding-left: 20px;">Tenant Security Deposits 8,200</p> <p style="padding-left: 20px;">Accrued Property Taxes 2,109</p> <p style="padding-left: 20px;">Accrued Interest Payable 9,689</p> <p style="padding-left: 20px;">Accrued Audit Fees 9,225</p> <p style="padding-left: 20px;">Due to West Lake Management 10,640</p> <p style="padding-left: 20px;">Tenant Prepaid Rent 75</p> <p style="padding-left: 20px;">Accr Compensated Absences 4,948</p> <p style="padding-left: 20px;">Mortgage Note Payable 3,232,927</p> <p style="padding-left: 20px;">Second Mortgage Note Payable 850,000</p> <p style="padding-left: 20px;">Third Mortgage Note Payable 394,424</p> <p style="padding-left: 20px;">Fourth Mortgage Note Payable 400,000</p> <p style="padding-left: 20px;">Note Payable - City of Bartow Impact Fees 564,621</p> <p style="padding-left: 20px;">Deferred Development Fee 1,570,197</p> <hr style="border: 0.5px solid black;"/> <p><b>Total Liabilities 7,066,750</b></p> <p>Partners' Equity 6,914,755</p> <hr style="border: 0.5px solid black;"/> <p><b>Total Equity 6,914,755</b></p> <hr style="border: 0.5px solid black;"/> <p><b>Total Liabilities and Equity 13,981,505</b></p>

**LAKELAND HOUSING AUTHORITY**  
Updated 12/6/2013

		START DATE	OBLIGATION END DATE	DISTRIBUTION END DATE	AUTHORIZED	OBLIGATION 90% THRESHHOLD	OBLIGATED AMOUNT	DISBURSED	AVAILABLE BALANCE
<b>Capital Fund Program</b>	<b>(HUD)</b>								
CFP - 2011		07-15-11	08-03-13	08-02-15	562,980.00	506,682.00	532,317.00	518,723.00	44,257.00
CFP - 2012		03-12-12	03-11-14	03-11-16	327,414.00	294,672.60	20,000.00	16,673.00	310,741.00
CFP -2013		08-09-13	09-08-15	09-08-17	251,538.00	226,384.20	19,000.00	0.00	251,538.00
				<b>CFP Subtotal:</b>	<b>1,141,932.00</b>	<b>1,027,738.80</b>	<b>571,317.00</b>	<b>535,396.00</b>	<b>606,536.00</b>
<b>Replacement Housing Factor</b>	<b>(HUD)</b>								
RHF - 2009(a)		09-15-09	10-29-15	07-27-17	282,108.00	253,897.20	0.00	0.00	282,108.00
RHF - 2009(b)		04-02-10	10-29-15	10-29-17	149,804.00	134,823.60	0.00	0.00	149,804.00
RHF - 2010		07-15-10	10-29-15	10-29-17	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	10-29-15	10-29-17	185,485.00	166,936.50	0.00	0.00	185,485.00
RHF - 2012(b)		03-12-12	10-29-15	10-29-17	70,661.00	63,594.90	0.00	0.00	70,661.00
RHF - 2013		08-09-13	09-08-15	09-08-17	271,433.00	244,289.70	0.00	0.00	271,433.00
				<b>RHF Subtotal:</b>	<b>1,781,197.00</b>	<b>1,358,787.60</b>	<b>0.00</b>	<b>0.00</b>	<b>1,781,197.00</b>
<b>HOPE VI</b>	<b>(HUD)</b>	04-05-00		12-31-17	<b>21,842,801.00</b>		<b>19,908,767.13</b>	<b>19,908,767.13</b>	<b>1,934,033.87</b>
<b>Safety &amp; Security Grant</b>	<b>(HUD)</b>	03-20-13	03-19-14	03-19-15	250,000.00	225,000.00	5,600.00	5,161.08	244,838.92
				<b>Safety &amp; Security Subtotal:</b>	<b>250,000.00</b>	<b>225,000.00</b>	<b>5,600.00</b>	<b>5,161.08</b>	<b>244,838.92</b>
<b>Resident Opportunities and Self Sufficiency</b>	<b>(HUD)</b>								
ROSS - Family Self Sufficiency 2012		09-26-12	07-01-14		52,084.00			14,097.62	37,986.38
ROSS - Service Coordinator 2011		09-22-11	09-29-14		140,838.00			115,689.56	25,148.44
				<b>ROSS Subtotal:</b>	<b>192,922.00</b>			<b>115,689.56</b>	<b>63,134.82</b>
<b>YouthBuild</b>	<b>(DOL)</b>	06-01-11	05-31-14		997,492.00			581,577.86	415,914.14
				<b>YouthBuild Subtotal:</b>	<b>997,492.00</b>			<b>581,577.86</b>	<b>415,914.14</b>
<b>21st Century</b>	<b>(DOE)</b>	08-01-13	07-31-14	09-20-14	324,331.00			73,324.41	251,006.59
				<b>21st Century Subtotal:</b>	<b>324,331.00</b>			<b>73,324.41</b>	<b>251,006.59</b>

# Housing Management

## Board Report December meeting 2013

- **Public Housing (PH), Housing Choice Voucher (HCV) and West Lake Management Communities Reports**
  - Housing communities reports
    1. West Lake
    2. West Lake Addition
    3. Cecil Gober
    4. John Wright Homes
    5. Carrington Place (Formerly known as Dakota Apartments)
    6. Renaissance/Washington Ridge
    7. Villas at Lake Bonnet
    8. Colton Meadow
    9. The Manor at West Bartow
  - Housing Choice Voucher Program
    1. Intake & Occupancy Report
    2. Housing Choice Voucher report

We have been implementing new and innovative customer feedback systems that foster friendly, respectful and effective staffs interface with our customers that are both genuine and professional. Additionally, we are expanding use of state-of-the-art technology to improve our service to individuals and families while reducing costs. We have entered into unprecedented levels of partnering with other local service agencies; a powerful approach to sharing resources in order to get our important work done rapidly and efficiently.

And we count with a truly dedicated staff that cares about our residents, receives important training, and regularly provides extraordinary service beyond the simple “call of duty.”

The Management Department has been developing a Crime Free Multi-Housing Program as a way of partnering with local landlords, property managers, and residents to improve public safety in the community through monthly meetings and crime watch groups.

The Housing staff is working with other departments specifically with the Development staff to continue our successful development program that is focusing on the production of self-supporting affordable housing through;

- Extremely thorough long-term planning and performance measures;
- Strong governance and management;
- Moderate reliance on Department of Housing and Urban Development (HUD) funding;
- Stronger property management measures than other rated public housing authorities;
- Above average condition of all properties, and significant ongoing improvements and replacement of older housing stock.

This month we are presenting the new HUD required annual utility allowance for Section 8 and Public Housing, the Section 8 program utility allowances must be modified because the new numbers based on the energy study are over or under the 10% variance. The Public Housing energy study shows changes that are less than the 10% variance, so no changes are required.

During the month of November, the following communities received great remarks from our investors, Carrington Place was inspected in November 21 by a third party auditor representing the investors, receiving great reviews and



Renaissance at Washington Ridge and Carrington Place were audited and inspected on December 4 by Boston Capital, also receiving high remarks. Actually, the auditor mentioned that we (the new management team) in comparison to the team (Third party contractor and Management company) that was in charge of the sites from 2009 to 2011 (Note: during this period these sites failed most of the inspections) has done a lot for the two communities and that she feels more comfortable reporting back to the investors and partners.

We have also submitted the budgets for the properties to the investors for approval and comments. During this process the investors and partners will submit their questions and propose changes until the final budget is approved.

Business opportunities, we have signed an agreement with Colton Meadow, the Villas at Lake Bonnet, the Manor at West Bartow, the Lakeridge Homeowners Association, etc... to provide landscaping services. Our goal is to increase our clientele based and subsequently our net operating income. Furthermore, in 2014 we will start looking to add third party properties to our portfolio which will allow us to increase the bottom line and further our development activities.

Housing Choice Voucher Program, the program will be relocated back into the LHA COCC building, this move is due to the saving measures we are taking in order to stay in line with HUD reductions in subsidy. Additionally, we are currently working on collecting all the required information for the 2014 SEMAP report.

### **Public Housing PIC Reporting Percentage**

All Housing Authorities are required to submit information to HUD through the PIH Information Center (PIC). All transactions processed on the Public Housing 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 Public Housing program:

Effective Date	HCV	Date Collected
10/31/2013	99.66%	12/03/2013

## Housing Choice Voucher Program Monthly Board Report November 2013

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- **Tenant-Based Waitlist**

As of November 30, 2013, the Housing Choice Voucher tenant based waiting list contained one hundred fifty one (151) applicants.

- **VASH Waitlist**

As of November 30, 2013, the Veteran Affairs Supportive Housing waiting list contained no applicants.

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

As of November 30, 2013, Lakeland Housing Authority project-based waiting list for the Manor at West Bartow contained six (6) applicants.

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

As of November 30, 2013, Lakeland Housing Authority project-based waiting list for the Villas at Lake Bonnet contained one hundred and three (103) applicants.

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

As of November 30, 2013, Lakeland Housing Authority project-based waiting list for Habitat for Humanity contained one (1) applicant.

### **HCV Program Information**

- **Port Outs**

LHA currently has twenty (20) port-outs in the month of November. Port outs are clients that use their voucher in another jurisdiction. The total amount of Portable HAP payment for the month of November is \$14,091.40. This includes the Admin Fee of \$596.40.

- **Port Ins**

LHA currently has one hundred twenty (1209) port-ins for the month of November. Port-ins are participants that transferred from another housing agency that we are billing for HAP and administrative fees.

- **Lease-up & Movers**

As of November 30, 2013, Lakeland Housing Authority issued fourteen (14) vouchers to movers. We received five (5) Requests for Tenancy Approvals during the month of November. We processed twenty one (21) unit transfers, zero (0) initial move-in, and two (2) port-in with a date effective in November.

- **Active Clients**

As of November 30, 2013, LHA is servicing 1,270 families on the Housing Choice Voucher program. These families include 916 regular Housing Choice Voucher holders, 45 Mainstream Disabled Housing Vouchers, 53 VASH, 114 Project-Based Vouchers, 22 Tenant Protection Program (TenPro) and 120 Port Ins.

- **EOP – End of Participation**

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

<b>Reason</b>	<b>Number</b>
Termination – Criminal	0
Termination – Unreported income and/or family composition	1
Left w/out notice	1
No longer need S/8 Assistance	1
Deceased	0
Landlord Eviction	0
Lease and/or Program Violations non-curable	0
Voucher Expired	0

- **Monthly HAP Analysis**

HAP disbursement for November 2013 was \$646,702 and Admin Fee paid to Receiving PHAs administering our vouchers was \$418.

- **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:

<b>Effective Date</b>	<b>HCV</b>	<b>Date Collected</b>
10/31/2013	100.25%	12/03/2013

- **General information and activities for the month of November**

- The Housing Choice Voucher Department processed one hundred eight (108) annual certifications and sixty three (63) interim certifications.
- The Housing Choice Voucher program conducted five (5) informal hearing in the month of November.

## RECEPTION MONTHLY REPORT 2013

	VISITOR'S COUNT	RFTA	REQUEST TO LIST PROPERTY	INTERIM CHANGE	SCHEDULED APPOINTMENTS	STAMPED MAIL
January	451	16	38	37	67	3157
February	392	5	14	32	62	4829
March	605	3	14	29	80	4248
April	532	10	20	44	144	1787
May	390	20	21	55	90	1750
June	424	17	18	45	57	671
July	441	14	28	45	61	1851
August	440	24	21	52	100	2105
September	429	16	30	38	105	2000
October	382	11	40	36	120	200
November	314	5	31	30	100	853
December						



Reports from the Communities  
 November 2013

Communities

1. West Lake
2. West Lake Addition
3. Cecil Gober
4. John Wright Homes
5. Carrington Place (Formerly known as Dakota Apartments)
6. Renaissance/Washington Ridge
7. Villas at Lake Bonnet
8. Colton Meadow
9. The Manor at West Bartow

Please follow the sequence above. Figures are as of November 30.

Number	1	2	3	4	5	6	7	8	9
Occupancy %	95%	100%	100%	100%	100%	99%	99%	98%	99%
Vacant units	3	0	0	0	0	1	1	2	1
Annual Turnover rate %	22%	18%	3%	15%	11%	25%	10%	10%	1%
Current rents:									
1 bedroom	387	425	481	N/A	N/A	495	N/A	N/A	699
2 bedrooms	443	508	N/A	526	587	563	627	627	801
3 bedrooms	543	576	N/A	579	668	637	709	709	N/A
4 bedrooms	581	N/A	N/A	N/A	734	699	N/A	780	N/A
5 bedrooms	N/A	N/A	N/A	N/A	1000	N/A	N/A	N/A	N/A
Unit inspections	6	12	7	1	10	196	4	3	0
Building inspections	6	10	6	1	7	53	6	6	0
Vegetation trimmed	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes
Security issues (Insurance claims)	No	No	No	No	No	No	No	No	No
Management referrals (Late rent notices)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Number of Annual Certifications done	9	10	12	1	10	40	2	5	39
Newsletter distributed	Yes	Yes	Yes	Yes	No	No	No	No	Yes
Community Manager's Name	Vanessa C. Johnson	Vanessa C. Johnson	Vanessa C. Johnson	Vanessa C. Johnson	Kasandra Davis	Kasandra Davis	Cynthia Craig	Cynthia Craig	Jennifer Robinson
Comments	Monthly residents meeting	Monthly residents meeting	Monthly residents meeting	Monthly residents meeting	Community partner is servicing the residents every Saturday with activities for Children. Health Fair and Harvest event for Children too.	Health Screenings, movie day, birthday celebrations, resident meetings and daily feeding	Monthly residents meetings and Tutoring: Weekly; each Wednesday from 4pm to 6pm	Monthly residents meetings and Tutoring: Weekly; each Wednesday from 4pm to 6pm	Monthly residents meeting and community yard sale, bingo daily, craft and movie night and a Christmas Dinner

By: Carlos R. Pizarro, Director of Housing

## REAL ESTATE PLANNING & DEVELOPMENT

### I. Authority-Wide Updates

**Section 3 and M/WBE:** Three (3) new contracts were executed November 1-30, 2013. One (1) contract was awarded to GLE Associates, Inc. (GLE). It was a task order for a limited cause and origin investigation at the Central Office in an amount not to exceed \$1,750. The other agreement was with Residential Investment Group, Inc. in an amount not to exceed \$54,725 for reroofing of various buildings in the Westlake Apartments Community. Marshalls, LLC also received an agreement in the amount of \$6,377 for replacement of a 10-ton air conditioning compressor unit at the Lake Ridge Community Building. Execution of these contracts has had the following effect on LHA's Section 3 and M/WBE percentages:

- The amount of work contracted to outside vendors by LHA, or its affiliates, increased by \$62,852 from \$452,266 to **\$515,118**.
- The total dollar volume of work contracted to M/WBE firms increased from \$235,948 to **\$290,673**. This equates to 56% of the total dollar volume contracted by LHA.
- Ten (10) of the 37 contracts are with M/WBE firms. This represents 27% of the contracts.
- Three (3) of the 37 contracts are with Section 3 Business Concerns; which represents approximately 8% of the contracts.
- Three (3) Section 3 Hires have been employed as part of LHA's existing contracts.

**Green Physical Needs Assessment (GPNA):** Staff continued to work with representatives from Clampett Industries, LLC d.b.a. EMG Holdings, LLC (EMG) to finalize the GPNAs for each community and closeout the project. The project is scheduled to be completely closed out by December 31, 2013.

**Lake Ridge Homeowners Association:** Staff continued to manage the operations of the 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 and addressing and resolving the delinquent HOA fees. The Annual HOA Meeting occurred on Monday, November 25, 2013. A call for nominees to the Board of Directors was made as part of the meeting. All five (5) nominees were elected to the Board by acclamation. The next HOA Meeting is scheduled for Thursday, January 23, 2014.

**Fiscal Year 2014 Budgets:** During this reporting period staff continued to work with team members from Housing and Finance to refine the 2014 Annual Budget. The budget will be submitted for approval via Resolution Number 13-1371.

**Financial Advisor:** Staff issued the Request for Proposal (RFP) for Financial Advisor on October 2, 2013. LHA received 10 responses to the RFP prior to the October 23, 2013 deadline. On November 1, 2013, the Evaluation Committee met to rank proposals from the 10 firms. Proposals submitted by five (5) of the firms indicated to the Evaluation Committee that their firms had the ability to best serve the needs of LHA.

## REAL ESTATE PLANNING & DEVELOPMENT

Subsequently, staff scheduled interviews with each of the five highest ranking firms. One (1) firm declined to be interviewed. Interviews with the remaining four (4) firms occurred on December 4, 2013. The interview process revealed that no one firm possessed expertise in all financial areas outlined by the RFP. However, all requirements of the RFP could be addressed if LHA proceeded with establishment of the indefinite delivery/indefinite quantity (IDIQ) pool with three of the firms. Resolution Number 13-1372 recommends contracting with Baker Tilly Virchow Krause, LLP (Madison, Wisconsin); IFH Solutions, Inc. (Canton, Georgia); and TAG Associates of Florida, LLC (Celebration, Florida).

### II. LHA Portfolio

#### Arbor Manor

- Staff did not perform any activities related to Arbor Manor this reporting period

#### Cecil Gober

- Aging-In-Place Design: The Stop Work Order dated July 11, 2013 remains in effect. There are no new items to report.
- Aging-In-Place Modernization: There are no updates to provide for this item. This item will remain "On Hold" until revisions to the design are completed.
- Tax Credit Application: Staff continued to explore the feasibility of using SAIL funding in conjunction with tax-exempt bond financing to rehabilitate Cecil Gober. On November 22, 2013, staff submitted comments to Florida Housing Finance Corporation on the SAIL Request for Applications.

#### Hampton Hills

- Homeownership Plan: On November 7, 2013, outside counsel contacted staff at HUD's Special Application Center (SAC) to obtain a status on approval of the plan. During the call outside counsel discovered that the Director of SAC had retired. Subsequently, outside counsel facilitated a conference call with the Acting Director to obtain a status on approval of the plan. The conference call occurred on Tuesday, November 12, 2013. SAC forwarded approval of the plan two days later on November 14, 2013. Staff reviewed the Implementing Agreement to ensure that terms contained within the document were consistent with the plan proposed by LHA for Hampton Hills. Once the Implementing Agreement is fully executed, LHA may proceed with implementation of the Homeownership Plan for Hampton Hills.
- 3887 Covington Lane: GLE Associates, Inc. (GLE) submitted the topographical survey and geotechnical report to LHA on October 30, 2013. The next step is for GLE to design a solution that will allow the side yard to drain.

## REAL ESTATE PLANNING & DEVELOPMENT

### John Wright

- Staff did not perform any activities related to John Wright during this reporting period.

### Westlake

- Fiscal Year 2012 Capital Fund Emergency Safety and Security Program: On December 6, 2013, LHA issued the Request for Proposal for remote video surveillance equipment. Proposals are due by 2 p.m. on January 8, 2014. LHA has until March 20, 2014 to obligate 90% of the grant award for Dakota Park and Westlake. Surveillance Equipment for The Manor at Washington Oaks and the Central Office will be funded with Capital Fund Program (CFP) 2012 and 2013.
- Redevelopment of Westlake: Staff did not perform any activities related to this project during this reporting period.
- Reroofing of Various Buildings: The Pre-Construction Conference occurred on November 13, 2013 at 8:30 a.m. Repairs to the roofs are in progress. All work is scheduled to be completed by December 20, 2013.

### Williamstown

- Staff did not perform any activities related to Williamstown during this reporting period.

## III. Mixed Finance Developments

- Taxes: There are no updates related to taxes this reporting period.

### Colton Meadow

- In 2011 Paul Colton Villas GP, Inc., Polk County Housing, Inc., and Polk County Housing Developers, Inc. established an Operating Deficit Reserve for Colton Meadow. The amount of the reserve was \$880,866. A total of \$440,433 of the reserve was funded from the second and third installment of Developer Fees that Polk County Housing Developers, Inc. (PCHD) received upon stabilization. PCHD did not actually receive the fees. Instead, the funds were sent to AmeriNational Community Services, Inc. (AmeriNational) to be held in an interest bearing escrow account as a completion and operating deficit guaranty. However, the Completion and Operating Deficit Guaranty allows for \$440,433 of the Operating Deficit Reserve to be released as developer fee upon the achievement of two milestones. First, the project must achieve 100% lien free construction completion; which occurred on January 31, 2011. Additionally, the project must demonstrate a Debt Service Coverage Ratio of 1.15 to 1.00 for 24 consecutive months. That milestone was reached in November 2013. Subsequently, staff submitted a request to Florida Housing Finance Corporation (FHFC) for release of the funds on December 4, 2013. FHFC and AmeriNational representatives are in the process of reviewing the request.

## REAL ESTATE PLANNING & DEVELOPMENT

### **Carrington Place (formerly Dakota Park)**

- Fiscal Year 2012 Capital Fund Emergency Safety and Security Program: On December 6, 2013, LHA issued the Request for Proposal for remote video surveillance equipment. Proposals are due by 2 p.m. on January 8, 2014. LHA has until March 20, 2014 to obligate 90% of the grant award for Dakota Park and Westlake. Surveillance Equipment for The Manor at Washington Oaks and the Central Office will be funded with Capital Fund Program (CFP) 2012 and 2013.

### **Renaissance**

- FY 1999 HOPE VI Funds: The status of the 1999 HOPE VI funds remain unchanged. To recap, staff submitted the Alternative Development Plan (ADP) to HUD for approval on Friday, May 31, 2013. The Revitalization Plan (RP) Amendment was submitted to HUD on August 9, 2013. Submission of the Development Proposal occurred on August 19, 2013. Staff received questions from HUD regarding the ADP, RP Amendment, and Development Proposal on September 18, 2013. Staff addressed HUD's questions via issuance of Supplemental Information. Staff hand delivered the Supplemental Information to HUD on October 22, 2013. HUD requested a clarification on two items contained within the Supplemental Information on November 1, 2013. Staff transmitted the clarifications to HUD on November 22, 2013.

### **The Manor at West Bartow**

- The loan documents from Florida Housing Finance Agency (FHFC) requires its properties to comply with Fannie Mae Insurance Guidelines. As a result of changes within FHFC's policies, all properties are now required to carry sinkhole coverage in the state of Florida. Additionally, all properties must have mold coverage. The insurance policy for the Manor at West Bartow only consists of catastrophic ground cover collapse, which is very limited. Furthermore, the policy contains mold exclusion. Staff continues to work with FHFC's representative and the insurance carrier to determine the coverage required for each event so that a new insurance policy may be purchased for the site.

### **Villas at Lake Bonnet**

- Staff did not perform any activities related to Villas at Lake Bonnet this reporting period.

### **Magnolia Pointe**

- The Magnolia Ponte Condo Association did send a contractor to the one unit that LHA owns at 1200 Unitah #3. However, the contractor did not repair any of the structural damage that existed at the beam. Instead, the contractor just painted over the damage. Staff notified the Magnolia Ponte Condo Association that the repairs are unacceptable. Staff continues to wait to receive notification from Magnolia Pointe Condo Association of how the contractor plans to correct the repairs.



December 2013

## 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 November 2013:

- Issued an Invitation for Bids for *Replacement of Certain Breaker Panel Boxes and Circuit Breakers at WestLake Apartments*
- Developed an agreement with **Residential Investment Group, Inc.** for *Reroofing Various Buildings in the WestLake Apartments Community* with a not-to-exceed value of \$54,725
- Developed an agreement with **Marshalls, LLC** for the *Replacement of a 10-Ton Air Conditioning Compressor Unit at the Lake Ridge Community Building* with a not-to-exceed value of \$6,377
- Issued Task Order 03 to the **GLE Associates, Inc.** environmental testing/building inspection agreement for *Limited Cause and Origin Investigation—Central Office* for a not-to-exceed amount of \$1,750

**LAKELAND HOUSING AUTHORITY**  
SECTION 3 AND M/WBE SUMMARY REPORT  
(Existing Contracts: April 1, 2012 -November 30, 2013)

Item #	Contractor	Amount	M/WBE	Type	M/WBE Totals	Section 3 Firm	Section 3 Firm Totals	Section 3 Hires	Section 3 Totals
1	Rodmon and Rodman Hampton Hills	\$20,000.00	Yes	African-American	1	Yes	1	No	0
2	Bio Mass Tech	\$33,278.05	No	N/A	0	No	0	No	0
3	Robert's Painting	\$8,100.00	No	N/A	0	No	0	No	0
4	Zee's Construction	\$24,500.00	No	N/A	0	No	0	No	0
5	NKA Contractors	\$23,750.00	Yes	African-American	1	No	0	No	0
6	Jackson Management Consulting	\$10,198.00	Yes	African-American	1	No	0	No	0
7	Florida Dance Theatre	\$3,840.00	No	N/A	0	No	0	No	0
8	Rodmon and Rodmon (09-27-12 to 10-26-12)	\$5,750.00	Yes	African-American	1	Yes	1	No	0
9	Rodmon and Rodmon (10-29-12 to 10-28-13)	\$98,000.00	Yes	African-American	1	Yes	1	No	0
10	Bruce Reeves	\$5,000.00	No	N/A	0	No	0	No	0
11	Beachfront Community Outreach	\$31,900.00	Yes	African-American	1	No	0	Yes	1
12	PAINTSMART USA, INC.	\$31,000.00	Yes	African-American	1	No	0	Yes	2
13	Nova Engineering and Environmental, LLC	\$19,000.00	No	N/A	0	No	0	No	0
14	Atkins Paving, Inc	\$7,400.00	Yes	African-American	1	No	0	No	0
15	Best Termite & Pest Control	\$24,000.00	No	N/A	0	No	0	No	0
16	Clampett Industries dba EMG	\$39,000.00	No	N/A	0	No	0	No	0
17	Reeves Building and Plumbing Contractor	\$7,950.00	Yes	African-American	1	No	0	No	0
18	Jacksonville Sound	\$552.00	No	N/A	0	No	0	No	0
19	Marshalls, LLC	\$6,377.00	No	N/A	0	No	0	No	0
20	R.I.G., Inc.	\$54,725.00	Yes	N/A	1	No	0	No	0
<i>Indefinite Delivery, Indefinite Quantity Architectural Services Pool</i>									
21	GLE Associates	\$0.00	No	N/A	0	No	0	No	0
22	Wallis Murphey Boyington	\$0.00	No	N/A	0	No	0	No	0
23	Bessolo Design Group	\$0.00	No	N/A	0	No	0	No	0
24	Robert Reid Wedding	\$47,227.50	No	N/A	0	No	0	No	0
<i>Indefinite Delivery, Indefinite Quantity Property Appraisal Services Pool</i>									
25	Valuation Advisors	\$1,500.00	No	N/A	0	No	0	No	0
<i>Indefinite Delivery, Indefinite Quantity Surveying Services Pool</i>									
26	DRMP	\$0.00	No	N/A	0	No	0	No	0
27	Hamilton Engineering & Surveying	\$0.00	No	N/A	0	No	0	No	0
28	ECON	\$5,020.00	No	N/A	0	No	0	No	0
29	Pickett & Associates	\$0.00	No	N/A	0	No	0	No	0
<i>Indefinite Delivery, Indefinite Quantity Environmental Testing/Building Inspection Services Pool</i>									
30	ACT-American Compliance Technologies	\$0.00	No	N/A	0	No	0	No	0
31	GLE Associates	\$5,275.00	No	N/A	0	No	0	No	0

Note: Amounts referenced within the table include all contracts, amendments/change orders, and/or task orders issued to the vendor between April 1, 2012 and November 30, 2013.

**LAKELAND HOUSING AUTHORITY**  
SECTION 3 AND M/WBE SUMMARY REPORT  
(Existing Contracts: April 1, 2012 -November 30, 2013)

32	Terracon Consultants	\$0.00	No	N/A	0	No	0	No	0
<i>Indefinite Delivery, Indefinite Quantity Engineering Services Pool</i>									
33	Boggs Engineering (Civil)	\$350.00	No	N/A	0	No	0	No	0
34	Hamilton Engineering & Surveying (Civil)	\$0.00	No	N/A	0	No	0	No	0
35	EE & G Environmental (Environmental)	\$0.00	No	N/A	0	No	0	No	0
36	GLE Associates (Multi-discipline)	\$1,425.00	No	N/A	0	No	0	No	0
37	Biller Reinhart (Structural)	\$0.00	No	N/A	0	No	0	No	0
<b>TOTALS</b>		<b>\$515,117.55</b>			<b>10</b>		<b>3</b>		<b>3</b>

Note: Amounts referenced within the table include all contracts, amendments/change orders, and/or task orders issued to the vendor between April 1, 2012 and November 30, 2013.

**LAKELAND HOUSING AUTHORITY**  
SECTION 3 AND M/WBE SUMMARY  
(New Contracts: November 1-30, 2013)

Item #	Contractor	Amount	M/WBE	Type	M/WBE Totals	Section 3 Firm	Section 3 Firm Totals	Section 3 Hires	Section 3 Totals
1	Marshalls, LLC	\$6,377.00	No	N/A	0	No	0	No	0
2	R.I.G., Inc.	\$54,725.00	Yes	N/A	1	No	0	No	0
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
<i>Indefinite Delivery, Indefinite Quantity Architectural Services Pool</i>									
15									
16									
17									
18									
<i>Indefinite Delivery, Indefinite Quantity Property Appraisal Services Pool</i>									
19									
<i>Indefinite Delivery, Indefinite Quantity Surveying Services Pool</i>									
20									
21									
22									
23									
<i>Indefinite Delivery, Indefinite Quantity Environmental Testing/Building Inspection Services Pool</i>									
24	GLE Associates	\$1,750.00	No	N/A	0	No	0	No	0
25									
26									
<i>Indefinite Delivery, Indefinite Quantity Engineering Services Pool</i>									
27									
28									
29									
30									
31									
<b>TOTALS</b>		<b>\$62,852.00</b>			<b>1</b>		<b>0</b>		<b>0</b>

Note: Amounts referenced within the table include all contracts, amendments/change orders, and/or task orders issued to the vendor November 1-30, 2013.

## INVESTIGATIVE BOARD REPORT

The following activities were accomplished November 1-30, 2013:

### 1 Small Claims Court

- There was no small claim cases made for the month of November.

### 2 Eviction Court

- Two evictions were filed for the month of November. The two were from West Lake Management, and were for non-payment of rent. One was filed for Lakewood Terrace Apts. (we act as an agent for Lakewood Terrace Apts.)

### 3 Applicant Criminal Histories

- During the month of November, two (02) criminal histories were processed for Public Housing applicants **resulting in a net savings to the Lakeland Housing Authority of forty-six dollars (\$46).**

### 4 Public Housing Re-certification Criminal Histories

- No re-certifications were submitted for the month of November.

### 5 Conflict Resolutions

- One for the month of November.

### 6 Public Housing Fraud Recovery

- None for the month of November

### 7 Repayment Agreements

- One for the month of November for un-paid balance in the amount of \$300.00 (three hundred dollars and no cents)

## Section 8

### 1 Section 8 Terminations

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

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

## INVESTIGATIVE BOARD REPORT

### 2 Section 8 Repayment Agreements

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

### 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 November, the Lakeland Housing Authority Investigations Department ran three (03) criminal histories for Section 8 applicants. **This resulted in a net savings of sixty-nine dollars (\$69).**

### 6 Section 8 Re-certification Criminal Histories

- During the month of November, three (03) section 8 re-certifications were submitted to Investigations, for a **total savings of sixty-nine dollars (\$69).**

### 7 Section 8 Hearings

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

### 8 VASH

- Five (05) for the month of November, for a **total savings of one hundred and fifteen dollars (\$115).**

#### Administration

- The investigative unit processed two (2) backgrounds on a L.H.A. new-hires, for a **savings of forty-six dollars (\$46).**

#### The Manor at West Bartow

- Three criminal history re-certs were run for the month of November, for a **savings of sixty-nine dollars (\$69).**

#### Washington Renaissance and Carrington Place (formerly Dakota Park Apartments)

- Six (06) new applications for criminal history were submitted for November, for the Renaissance/Washington Oaks property, resulting in a savings of **one hundred and thirty-eight dollars (\$138)**. Two (02) applications submitted for recertification for the month of November, for a savings of **forty-six dollars (\$46)**.

## INVESTIGATIVE BOARD REPORT

### Colton Meadow/Villas at Lake Bonnet

- Seven (07) criminal histories were processed for Colton Meadow, for the month of November, **for a savings of one hundred and sixty-one dollars (\$161)**. We also completed two (02) applications for recertification for a savings of **forty-six dollars (\$46)**. **Six (06) criminal histories were processed for new applications for a savings of one hundred and thirty-eight dollars (\$138) at the Villas at Lake Bonnet property.** Four (04) recertifications were submitted to investigations for processing, for a savings of ninety-two dollars (\$92).

### Lincoln Square Apartments

- No longer do checks on this property

### General

- During the month of November, we completed two (02) background checks for Lakeland Housing Authority employment, and attended several meetings. In addition we wrote ten (10) parking violations. One 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 **one thousand two hundred and sixty-five dollars (\$1,265)**, for the month of November. This figure is based upon the cost of twenty-three dollars per background check by outside information suppliers. The Lakeland Housing Authority Investigation Department is now doing outside vendor work for Lakewood Terrace Apartments. We are now handling all evictions, and conflict resolutions.

**Resident Services  
November 2013 Board Report**

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

**Production Summary**

The ROSS Resident Services 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. Residents continue to sign-up for the Residential Employment Transportation Assistance Program (RETAP), a partnership between LHA and Polk Transit that provides free public transportation (city bus) to persons who are employed, seeking employment and/or attending classes to further their education.

**Community Involvement**

On Monday, November 18, 2013 the City of Lakeland held a Community Meeting to address gang-related issues. There have been a number of shootings in the last few months (20 shootings, 16 in the Northwest Lakeland District). The purpose of the meeting was to receive input from the members of the community to create steps needed to curb gang membership within the community. The meeting was held at the Coleman Busch Building. The welcome was presented by Mayor Gow B. Fields.

The Community Meeting Gang Overview Presentation included the following:

- An overview of gangs by the Lakeland Police Department. This overview included the changing gang demographics and membership activity.
- Community understanding of what to look for to identify gang behavior.
- Identifying the gaps of what is missing in community programs as well as listing alternatives.
- Identifying community resources and understanding positive community-based programs.
- How to start a plan and dialogue needed to move forward.

Earl W. Haynes, LHA Resident Services Director, was afforded the opportunity to attend this meeting and I'm glad that I did. I was in denial and naive about the seriousness of gang activity here in our Lakeland community. It is real and prevalent with 260 documented gang members and associates. Right now in Lakeland, we have 46 listed gangs.

A special thanks goes out to Commissioner DiCesare for bringing to our attention the Department of Revenue General Tax Administration disposal of surplus property. LHA's Department of Resident Services submitted a memorandum requesting an in-kind contribution of surplus computers to be used in various capacities to enhance the self-sufficiency of our residents and timely



communication with our City Wide Resident Organization (CWRO). As a result, LHA was approved to receive eleven (11) laptops and other miscellaneous equipment. We also thank Ellen Johnson, Program Administrator; Sherri Parsons, Property Analyst; Linda Sabatino, Property Contact; and Beverly Rousseau, Property Delegate.

### **City-Wide Residents Organization (CWRO)**

A meeting with the members of the City-Wide Residents Organization (CWRO) was held on Nov. 14<sup>th</sup>. Earl Haynes, LHA Resident Services Director rendered an overview of LHA's Department of Resident Services. Some of the topics covered were the Memorandum of Understanding (MOU) between LHA and the CWRO, Resident Participation Funds and the contact Coordinators for Resident Services: Cynthia Zorn-Shaw and Linda Willis. An overview of LHA's Department of Housing was given by Carlos Pizarro, LHA Housing Director. The CWRO members shared updates, proposed activities desired for the residents, questions and concerns. On Nov. 25<sup>th</sup> -27<sup>th</sup>, Judith Haggins, CWRO representative of Dakota Park Apartments, conducted training sessions to teach the youth residents of Dakota Park Apartments, how to be respectful, good neighbors, and how to keep the property and community center clean. Lunch was served to the participating youth, daily.

### **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 six at LHA's Emma Turner Center. During the month of November 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. Through LHA's collaboration effort with Catholic Charities' Polk Prosperity Campaign Volunteers, on November 13<sup>th</sup> and 14<sup>th</sup>, the Center served as a training site for persons who want to serve as Volunteers Income Tax Assistance. Ameshia Jackson and Latryna Carlton conducted the training. Volunteers are needed for the following: Greeter/Administrative, Tax Preparer, and Advanced Tax Preparer. Two more workshops are scheduled for December 4<sup>th</sup> – 5<sup>th</sup>, and December 11<sup>th</sup> – 12<sup>th</sup>. As a VITA volunteer, LHA residents can receive free training that can be included on their Resume', gain experience and confidence for future employment, get information to help them to file their own tax return, work one-on-one with families, help families to save money, and help local economics and communities.

### **Upcoming Christmas Events**

The following Christmas events are scheduled for LHA residents:

- November 18<sup>th</sup> – December 18<sup>th</sup> - Toy & Food Drive
- December 14<sup>th</sup> - Christmas Social for West Lake and John Wright Homes at West Lake Homes
- December 21<sup>st</sup> - Rock the Block at The Renaissance

- **YouthBuild-Lakeland**



**YouthBuild Lakeland** received a grant from the Traveler's Foundation, the charitable arm of Travelers. This is our fourth grant award since 2010. This year's award was \$12,500.

**Academics:**

Youthbuild continues to help the community through GED preparation. The program is currently offering preparation to 11 young adults. On November 5<sup>th</sup>, five of the students took the GED exam and are eagerly awaiting their results. The remaining students are receiving individualized help to prepare the testing in early December.

**Placement:**

**New Employment**

Three of our recent graduates are working temporarily with Lakeland Housing Authority's Renaissance apartments as part of the maintenance crew.

Tracy Delgado was hired as an assistant activities director for Hawthorne Inn of Winter Haven!

**Certified Nursing Training**

Congratulations to Tracy Delgado, Cheyanna Hayes, Shantel Holt, Nick Dozier and Taniesha Palmer! These five, CYCLE 9 graduates have completed training that enables them to sit for the exam administered by the Florida Department of Nursing. Upon passing this exam, they will be licensed certified nursing assistants.

## Polk State College

Adam Swanson, Myric Hosegood and Nicholas Trader, Cycle 9 graduates will soon complete their first semester at PSC and will resume their studies in January! Adam is liberal arts major; Nicholas and Myric are pursuing criminal justice degrees. Jordan Lowe and Shantel Holt are both registered to begin their first semester in January. Jordan will be studying journalism and Shantel is seeking entrance to the Nursing Department.

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

October 2013	# FSS Tenants	# with Escrow	% with Escrow	Escrow Amount (\$)
Public Housing (02,04) (05)	30	16	53	32,209.97
Dakota Park (13)	08	04	50	24,961.45
Renaissance (14)	11	03	27	20,949.55
Totals	49	22	45*	78,120.97

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

**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:** Zero (0)

**Termination/Forfeiture/Transfer/Disbursement:** One (1) evicted from Property 04; forfeited \$8,836.00; One (1) became self-sufficient from Property 02 by paying flat rent; One (1) interim disbursement from Property 04 in the amount of \$988.00.

**Earned Income from Employment:** One (1) started earning escrow funds.

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

Programs	# Of FSS Tenants	% Slots filled	# Tenants with Escrow	% With Escrow
Section 8 (HCV)	64	85	27	42%

**Escrow Balances**

- The balance of the Section 8 FSS Escrow November 2013 is \$89,087.81
- The average amount is \$3,299.55

**Recruiting:** Received two (2) letters of interest

**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 November 2013.

**Goals completed/enrolled by the Section 8 FSS participants:** Two (2) new enrollments.

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

**Services needed to complete Contract of Participation:** A large number of our clients need assistance with childcare; 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; and Polk Work Partner Management

## Westlake 21<sup>st</sup> Century Community Learning Center

- We had 74 students enrolled in the after-school program. The program was closed on November 11<sup>th</sup> and the 25<sup>th</sup> through the 29<sup>th</sup>. The students learned about community service by having a Thanksgiving visit to the elderly. We had a Parental Involvement night on November 7<sup>th</sup>. Our 21<sup>st</sup> CCLC staff training was on November 21<sup>st</sup>. Our program partnered with Liberty National Life Insurance Blanco Agencies and had a food distribution on November 27<sup>th</sup>.

### Upcoming

- The After-School Program will be closed December 23<sup>rd</sup> through January 6<sup>th</sup>. The 21<sup>st</sup> CCLC is planning a coat and shoe drive for the homeless during the month of December. We will have a Parental Involvement Night on December 19<sup>th</sup>. The students will be visiting, bringing handmade gifts, and singing to the elderly on December 20<sup>th</sup>. Our next 21<sup>st</sup> CCLC staff meeting is on December 20<sup>th</sup>.

---

Earl W. Haynes  
Resident Services Director

Janiene Bambridge  
Interim Resident Services Manager

Cynthia E. Zorn-Shaw  
ROSS Service Coordinator

Kim Bean  
21<sup>st</sup> CCLC Site Coordinator

Linda Willis  
PH/FSS Coordinator

Dayen Valentine  
S8/FSS Coordinator

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

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

**Re: Resolution # 13-1370**

The Board of Commissioners is requested to approve the above-referenced resolution to authorize revisions of the current utility allowance schedule for Housing Choice Voucher participants.

**2. Who is making request:**

A. Entity: The Housing Authority of the City of Lakeland

B. Project: Implement the utility allowance schedules for participants effective January 01, 2014.

C. Originator: Carlos Pizarro

**3. Cost Estimate:**

N/A

**Narrative:**

The Department of Housing and Urban Development requires the Housing Authority to review its utility allowances annually. The review shall include all changes in circumstances including completion of modernization and/or other energy conservation measures implemented by the Housing Authority which would lead to a change in reasonable consumption requirements and changes in utility rates.

The utility allowance survey method is the preferred method of obtaining current utility rates and charges for Public Housing and Section 8 Housing Choice Voucher programs. The outcome of this study will enable the Housing Authority to update the current utility allowance schedule.

The Housing Authority solicited three vendors to provide the study. *Housing Authority Services* was selected as the consulting firm for the public housing utility allowance study. *Housing Authority Services* has over twenty years' experience in federal, state, and local government consulting services in the following areas:

- Financial Management and Capital Fund Program
- Agency Plans and Policies
- PHAS
- SEMAP
- HQS

- Family Self Sufficiency
- Reasonable Rent Determination
- Utility Allowances
- Energy Audits
- Physical Needs Assessments

Based on previous experience and work history, the Housing Authority requested that the *Housing Authority Services* conduct the utility allowance study for the Section 8 and the Public Housing program participants.

#### OBJECTIVE

The objective of this study is to update the utility allowances with current utility suppliers' rates and charges for electricity, natural gas, water and sewer from the City, County and other jurisdictions. The methodology used to analyze the current utility allowances included a review of Monthly Consumption Allowances, Rate Information Gathering, Computation of Consumption Costs, submission of Section 8 and Public Housing HUD Forms, gathering Supporting Documentation, and finally implementing the allowances within 90 days of approval.

#### PRESENT SITUATION

The Housing Authority has a current utility allowance schedule that will be updated with the new utility allowance schedule (see attached HUD-52667 forms) based on the *Housing Authority Services* survey. The summary of the *Housing Authority Services* survey is attached as the *Previous and Current Utility Rates* document. (Note: the Public Housing utility allowances do not need any modifications as the variance or changes from the prior year are within the HUD guidelines.)

#### ANTICIPATED OUTCOME

By approving this Resolution, the Housing Authority will be able to implement the updated utility allowances in its programs and will therefore be compliant with HUD mandated utility allowance regulation 24 CFR 965.507 (b).

#### WHO BENEFITS

The Public Housing residents and the Section 8 participants of Lakeland Housing Authority will benefit.

## **RESOLUTION NO. 13-1370**

### **APPROVAL OF REVISED HOUSING CHOICE VOUCHER UTILITY ALLOWANCE SCHEDULES**

**WHEREAS**, the Housing Authority of the City of Lakeland is required by the United States Department of Housing and Urban Development to ensure that its Public Housing program and its Housing Choice Voucher (Section 8) program review and, if necessary, update the utility allowances for program participants on an annual basis; and

**WHEREAS**, after a study was performed to review the Housing Authority of the City of Lakeland's utility allowances, it was determined that the only adjustments that were necessary were to the Housing Choice Voucher program; and

**WHEREAS**, the revised utility allowances have been posted for thirty (30) days to allow for public review and comment;

**NOW THEREFORE, BE IT RESOLVED** that the Board of Commissioners of the Housing Authority of the City of Lakeland hereby approves the attached Housing Choice Voucher (Section 8) utility allowances effective January 01, 2014.

#### **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 Resolution No. 13-1370 dated December 16, 2013.

Attested by:

\_\_\_\_\_  
Benjamin Stevenson, Secretary

\_\_\_\_\_  
Michael A. Pimentel, Chairman



HUD-52667 Forms

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Auburndale</b>	Unit Type Low Rise/High Rise/Garden/Walk-Up	Date (mm/dd/yyyy)
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Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	4	7	7	9	10	11
	b. Bottle Gas	17	30	30	38	43	47
	c. Oil / Electric	6	7	8	9	10	10
	d. Heat Pump	3	3	3	4	4	4
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		16	24	32	40	48	56
Air Conditioning/Heat Pump		18	21	31	42	52	63
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		11	11	13	16	19	21
Sewer		35	35	35	35	35	35
Trash Collection		16	16	16	16	16	16
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00		20	20	20	20	20	20
Electric Flat Fee 8.00							

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family \_\_\_\_\_

Address of Unit \_\_\_\_\_

Number of Bedrooms \_\_\_\_\_

Utility or Service	per month cost
Heating	\$ _____
Cooking	_____
Other Electric	_____
Air Conditioning	_____
Water Heating	_____
Water	_____
Sewer	_____
Trash Collection	_____
Range/Microwave	_____
Refrigerator	_____
Other	_____
<b>Total</b>	<b>\$ _____</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Auburndale</b>	Unit Type Row House/Town House/Semi-Detached Duplex	Date (mm/dd/yyyy)
--	--	-------------------

Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	21	30	34	43	47	51
	c. Oil / Electric	7	8	9	10	11	12
	d. Heat Pump	3	3	4	4	4	5
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		16	26	36	50	60	70
Air Conditioning/Heat Pump		19	22	33	44	56	67
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		11	11	13	16	19	21
Sewer		35	35	35	35	35	35
Trash Collection		16	16	16	16	16	16
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		20	20	20	20	20	20

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family \_\_\_\_\_

Address of Unit \_\_\_\_\_

Number of Bedrooms \_\_\_\_\_

Utility or Service	per month cost
Heating	\$ _____
Cooking	_____
Other Electric	_____
Air Conditioning	_____
Water Heating	_____
Water	_____
Sewer	_____
Trash Collection	_____
Range/Microwave	_____
Refrigerator	_____
Other	_____
<b>Total</b>	<b>\$ _____</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Auburndale</b>	Unit Type <b>Single Family</b>	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances						
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	30	38	43	51	60	64
	c. Oil / Electric	9	10	11	13	14	15
	d. Heat Pump	4	4	4	5	6	6
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		23	34	44	59	69	80
Air Conditioning/Heat Pump		22	24	37	49	62	75
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		11	11	13	16	19	21
Sewer		35	35	35	35	35	35
Trash Collection		16	16	16	16	16	16
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		20	20	20	20	20	20

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family

Address of Unit

Number of Bedrooms

Utility or Service	per month cost
Heating	\$
Cooking	
Other Electric	
Air Conditioning	
Water Heating	
Water	
Sewer	
Trash Collection	
Range/Microwave	
Refrigerator	
Other	
<b>Total</b>	\$

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Bartow</b>	Unit Type Low Rise/High Rise/Garden/Walk-Up	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances					
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas	4	7	7	9	10	11
b. Bottle Gas	17	30	30	38	43	47
c. Oil / Electric	8	9	10	12	13	14
d. Heat Pump	3	4	4	5	5	6
Cooking						
a. Natural Gas	4	5	8	9	11	12
b. Bottle Gas	17	22	35	39	48	52
c. Oil / Electric	6	8	10	12	14	17
d. Coal / Other						
Other Electric	22	32	42	53	63	74
Air Conditioning/Heat Pump	24	27	41	55	70	84
Water Heating						
a. Natural Gas	7	10	13	16	20	24
b. Bottle Gas	31	44	57	70	87	105
c. Oil / Electric	13	20	27	34	41	48
d. Coal / Other						
Water	19	19	22	27	32	39
Sewer	28	28	31	33	36	39
Trash Collection	19	19	19	19	19	19
Range/Microwave	12	12	12	12	12	12
Refrigerator	13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00	20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.	Utility or Service	per month cost
Name of Family	Heating	\$
Address of Unit	Cooking	
Number of Bedrooms	Other Electric	
	Air Conditioning	
	Water Heating	
	Water	
	Sewer	
	Trash Collection	
	Range/Microwave	
	Refrigerator	
	Other	
	<b>Total</b>	<b>\$</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Bartow</b>	Unit Type Row House/Town House/Semi-Detached Duplex	Date (mm/dd/yyyy)
--	--	-------------------

Utility or Service	Monthly Dollar Allowances					
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas	7	9	10	12	14	15
b. Bottle Gas	21	30	34	43	47	51
c. Oil / Electric	9	11	12	13	15	16
d. Heat Pump	4	4	5	5	6	6
Cooking						
a. Natural Gas	4	5	8	9	11	12
b. Bottle Gas	17	22	35	39	48	52
c. Oil / Electric	8	10	13	16	19	22
d. Coal / Other						
Other Electric	22	35	48	66	80	93
Air Conditioning/Heat Pump	25/26	29	44	59	74	89
Water Heating						
a. Natural Gas	7	10	13	16	20	24
b. Bottle Gas	31	44	57	70	87	105
c. Oil / Electric	13	20	27	34	41	48
d. Coal / Other						
Water	19	19	22	27	32	39
Sewer	28	28	31	33	36	39
Trash Collection	19	19	19	19	19	19
Range/Microwave	12	12	12	12	12	12
Refrigerator	13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00	20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.	Utility or Service	per month cost
Name of Family	Heating	\$
	Cooking	
	Other Electric	
	Air Conditioning	
	Water Heating	
	Water	
	Sewer	
	Trash Collection	
	Range/Microwave	
	Refrigerator	
Address of Unit	Other	
	<b>Total</b>	\$
Number of Bedrooms		

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Bartow</b>	Unit Type <b>Single Family Detached</b>	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances					
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas	7	9	10	12	14	15
b. Bottle Gas	30	38	43	51	60	64
c. Oil / Electric	12	13	15	17	18	20
d. Heat Pump	5	5	6	7	7	8
Cooking						
a. Natural Gas	4	5	8	9	11	12
b. Bottle Gas	17	22	35	39	48	52
c. Oil / Electric	8	10	13	16	19	22
d. Coal / Other						
Other Electric	30	45	59	78	92	106
Air Conditioning/Heat Pump	28/29	32	49	65	82	99
Water Heating						
a. Natural Gas	7	10	13	16	20	24
b. Bottle Gas	31	44	57	70	87	105
c. Oil / Electric	13	20	27	34	41	48
d. Coal / Other						
Water	19	19	22	27	32	39
Sewer	28	28	31	33	36	39
Trash Collection	19	19	19	19	19	19
Range/Microwave	12	12	12	12	12	12
Refrigerator	13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00	20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.	Utility or Service	per month cost
Name of Family	Heating	\$
Address of Unit	Cooking	
Number of Bedrooms	Other Electric	
	Air Conditioning	
	Water Heating	
	Water	
	Sewer	
	Trash Collection	
	Range/Microwave	
	Refrigerator	
	Other	
	<b>Total</b>	\$

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Haines City</b>	Unit Type Low Rise/High Rise/Garden/Walk-Up	Date (mm/dd/yyyy)
---	--	-------------------

Utility or Service	Monthly Dollar Allowances					
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas	4	7	7	9	10	11
b. Bottle Gas	17	30	30	38	43	47
c. Oil / Electric	6	7	8	9	10	10
d. Heat Pump	3	3	3	4	4	4
Cooking						
a. Natural Gas	4	5	8	9	11	12
b. Bottle Gas	17	22	35	39	48	52
c. Oil / Electric	6	8	10	12	14	17
d. Coal / Other						
Other Electric	16	24	32	40	48	56
Air Conditioning/Heat Pump	18	21	31	42	52	63
Water Heating						
a. Natural Gas	7	10	13	16	20	24
b. Bottle Gas	31	44	57	70	87	105
c. Oil / Electric	10	15	20	25	31	36
d. Coal / Other						
Water	14	14	15	17	19	20
Sewer	35	36	48	51	58	66
Trash Collection	20	20	20	20	20	20
Range/Microwave	12	12	12	12	12	12
Refrigerator	13	13	13	13	13	13
Natural Gas Flat Fee 12.00						
Electric Flat Fee 8.00	20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.	Utility or Service	per month cost
Name of Family	Heating	\$
Address of Unit	Cooking	
Number of Bedrooms	Other Electric	
	Air Conditioning	
	Water Heating	
	Water	
	Sewer	
	Trash Collection	
	Range/Microwave	
	Refrigerator	
	Other	
	<b>Total</b>	<b>\$</b>



# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Haines City</b>	Unit Type Row House/Town House/Semi-Detached Duplex	Date (mm/dd/yyyy)
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Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	21	30	34	43	47	51
	c. Oil / Electric	7	8	9	10	11	12
	d. Heat Pump	3	3	4	4	4	5
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		16	26	36	50	60	70
Air Conditioning/Heat Pump		19	22	33	44	56	67
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		14	14	16	17	19	20
Sewer		35	36	43	51	58	66
Trash Collection		20	20	20	20	20	20
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00		20	20	20	20	20	20
Electric Flat Fee 8.00							

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.		Utility or Service	per month cost
Name of Family _____  Address of Unit _____  Number of Bedrooms _____		Heating	\$ _____
		Cooking	_____
		Other Electric	_____
		Air Conditioning	_____
		Water Heating	_____
		Water	_____
		Sewer	_____
		Trash Collection	_____
		Range/Microwave	_____
		Refrigerator	_____
		Other	_____
		<b>Total</b>	<b>\$ _____</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Haines City</b>	Unit Type <b>Single Family</b>	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances						
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	30	38	43	51	60	64
	c. Oil / Electric	9	10	11	13	14	15
	d. Heat Pump	4	4	4	5	6	6
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric	23	34	44	59	69	80	
Air Conditioning/Heat Pump	22	24	37	49	62	75	
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water	16	16	18	19	24	27	
Sewer	35	36	43	51	58	66	
Trash Collection	20	20	20	20	20	20	
Range/Microwave	12	12	12	12	12	12	
Refrigerator	13	13	13	13	13	13	
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00	20	20	20	20	20	20	

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family \_\_\_\_\_

Address of Unit \_\_\_\_\_

Number of Bedrooms \_\_\_\_\_

Utility or Service	per month cost
Heating	\$ _____
Cooking	_____
Other Electric	_____
Air Conditioning	_____
Water Heating	_____
Water	_____
Sewer	_____
Trash Collection	_____
Range/Microwave	_____
Refrigerator	_____
Other	_____
<b>Total</b>	<b>\$ _____</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Lake Wales</b>	Unit Type Low Rise/High Rise/Garden/Walk-Up	Date (mm/dd/yyyy)
--	--	-------------------

Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	4	7	7	9	10	11
	b. Bottle Gas	17	30	30	38	43	47
	c. Oil / Electric	6	7	8	9	10	10
	d. Heat Pump	3	3	3	4	4	4
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		16	24	32	40	48	56
Air Conditioning/Heat Pump		18	21	31	42	52	63
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		16	16	20	26	31	36
Sewer		31	32	36	42	50	57
Trash Collection		19	19	19	19	19	19
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		20	20	20	20	20	20

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family

Address of Unit

Number of Bedrooms

Utility or Service	per month cost
Heating	\$
Cooking	
Other Electric	
Air Conditioning	
Water Heating	
Water	
Sewer	
Trash Collection	
Range/Microwave	
Refrigerator	
Other	
<b>Total</b>	<b>\$</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Lake Wales</b>	Unit Type Row House/Town House/Semi-Detached Duplex	Date (mm/dd/yyyy)
--	--	-------------------

Utility or Service	Monthly Dollar Allowances					
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas	7	9	10	12	14	15
b. Bottle Gas	21	30	34	43	47	51
c. Oil / Electric	7	8	9	10	11	12
d. Heat Pump	3	3	4	4	4	5
Cooking						
a. Natural Gas	4	5	8	9	11	12
b. Bottle Gas	17	22	35	39	48	52
c. Oil / Electric	6	8	10	12	14	17
d. Coal / Other						
Other Electric	16	26	36	50	60	70
Air Conditioning/Heat Pump	19	22	33	44	56	67
Water Heating						
a. Natural Gas	7	10	13	16	20	24
b. Bottle Gas	31	44	57	70	87	105
c. Oil / Electric	10	15	20	25	31	36
d. Coal / Other						
Water	16	16	20	26	31	36
Sewer	31	32	36	42	50	57
Trash Collection	19	19	19	19	19	19
Range/Microwave	12	12	12	12	12	12
Refrigerator	13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00	20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.	Utility or Service	per month cost
Name of Family          Address of Unit          Number of Bedrooms	Heating	\$
	Cooking	
	Other Electric	
	Air Conditioning	
	Water Heating	
	Water	
	Sewer	
	Trash Collection	
	Range/Microwave	
	Refrigerator	
Other		
<b>Total</b>	<b>\$</b>	

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Auburnville</b>	Unit Type <b>Single Family</b>	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances						
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	30	38	43	51	60	64
	c. Oil / Electric	9	10	11	13	14	15
	d. Heat Pump	4	4	4	5	6	6
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric	23	34	44	59	69	80	
Air Conditioning/Heat Pump	22	24	37	49	62	75	
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water	11	13	17	23	28	36	
Sewer	21	32	36	42	50	57	
Trash Collection	19	19	19	19	19	19	
Range/Microwave	12	12	12	12	12	12	
Refrigerator	13	13	13	13	13	13	
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00	20	20	20	20	20	20	

<p><b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.</p> <p>Name of Family _____</p> <p>Address of Unit _____</p> <p>Number of Bedrooms _____</p>	Utility or Service	per month cost
	Heating	\$ _____
	Cooking	_____
	Other Electric	_____
	Air Conditioning	_____
	Water Heating	_____
	Water	_____
	Sewer	_____
	Trash Collection	_____
	Range/Microwave	_____
Refrigerator	_____	
Other	_____	
<b>Total</b>	<b>\$ _____</b>	

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Lakeland</b>	Unit Type Low Rise/High Rise/Garden/Walk-Up	Date (mm/dd/yyyy)
--	--	-------------------

Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	4	7	7	9	10	11
	b. Bottle Gas	17	30	30	38	43	47
	c. Oil / Electric	6	7	8	9	10	10
	d. Heat Pump	3	3	3	4	4	4
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		16	24	32	40	48	56
Air Conditioning/Heat Pump		18	21	31	42	52	63
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		16	17	20	23	26	30
Sewer		26	26	31	36	42	47
Trash Collection		17	17	17	17	17	17
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.		Utility or Service	per month cost
		Heating	\$
Name of Family _____  Address of Unit _____  Number of Bedrooms _____		Cooking	
		Other Electric	
		Air Conditioning	
		Water Heating	
		Water	
		Sewer	
		Trash Collection	
		Range/Microwave	
		Refrigerator	
		Other	
<b>Total</b>		<b>\$</b>	

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Lakeland</b>	Unit Type Row House/Town House/Semi-Detached Duplex	Date (mm/dd/yyyy)
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Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	21	30	34	43	47	51
	c. Oil / Electric	7	8	9	10	11	12
	d. Heat Pump	3	3	4	4	4	5
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		16	26	36	50	60	70
Air Conditioning/Heat Pump		19	22	33	44	56	67
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		16	17	20	23	26	30
Sewer		26	26	31	36	42	47
Trash Collection		17	17	17	17	17	17
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.		Utility or Service	per month cost
Name of Family _____  Address of Unit _____  Number of Bedrooms _____		Heating	\$ _____
		Cooking	_____
		Other Electric	_____
		Air Conditioning	_____
		Water Heating	_____
		Water	_____
		Sewer	_____
		Trash Collection	_____
		Range/Microwave	_____
		Refrigerator	_____
		Other	_____
		<b>Total</b>	<b>\$ _____</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Lakeland</b>	Unit Type <b>Single Family</b>	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances						
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	30	38	43	51	60	64
	c. Oil / Electric	9	10	11	13	14	15
	d. Heat Pump	4	4	4	5	6	6
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		23	34	44	59	69	80
Air Conditioning/Heat Pump		22	24	37	49	62	75
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		20	22	24	28	31	35
Sewer		28	28	33	39	44	49
Trash Collection		17	17	17	17	17	17
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.	Utility or Service	per month cost
Name of Family	Heating	\$
Address of Unit	Cooking	
Number of Bedrooms	Other Electric	
	Air Conditioning	
	Water Heating	
	Water	
	Sewer	
	Trash Collection	
	Range/Microwave	
	Refrigerator	
	Other	
	<b>Total</b>	<b>\$</b>



# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – Polk County</b>	Unit Type Low Rise/High Rise/Garden/Walk-Up	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances						
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	a. Natural Gas	4	7	7	9	10	11
	b. Bottle Gas	17	30	30	38	43	47
	c. Oil / Electric	6	7	8	9	10	10
	d. Heat Pump	3	3	3	4	4	4
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		16	24	32	40	48	56
Air Conditioning/Heat Pump		18	21	31	42	52	63
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		17	18	22	26	29	33
Sewer		57	58	67	76	78	78
Trash Collection							
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.	Utility or Service	per month cost
Name of Family	Heating	\$
Address of Unit	Cooking	
Number of Bedrooms	Other Electric	
	Air Conditioning	
	Water Heating	
	Water	
	Sewer	
	Trash Collection	
	Range/Microwave	
	Refrigerator	
	Other	
	<b>Total</b>	<b>\$</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – Polk County</b>	Unit Type Row House/Town House/Semi-Detached Duplex	Date (mm/dd/yyyy)
---	--	-------------------

Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	21	30	34	43	47	51
	c. Oil / Electric	7	8	9	10	11	12
	d. Heat Pump	3	3	4	4	4	5
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		16	26	36	50	60	70
Air Conditioning/Heat Pump		19	22	33	44	56	67
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		17	18	22	26	29	33
Sewer		57	58	67	76	78	78
Trash Collection							
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.		Utility or Service	per month cost
		Heating	\$
Name of Family _____  Address of Unit _____  Number of Bedrooms _____		Cooking	
		Other Electric	
		Air Conditioning	
		Water Heating	
		Water	
		Sewer	
		Trash Collection	
		Range/Microwave	
		Refrigerator	
		Other	
<b>Total</b>		<b>\$</b>	

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – Polk County</b>	Unit Type <b>Single Family</b>	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances						
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	30	38	43	51	60	64
	c. Oil / Electric	9	10	11	13	14	15
	d. Heat Pump	4	4	4	5	6	6
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric	23	34	44	59	69	80	
Air Conditioning/Heat Pump	22	24	37	49	62	75	
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water	23	23	27	31	43	50	
Sewer	57	58	67	76	78	78	
Trash Collection							
Range/Microwave	12	12	12	12	12	12	
Refrigerator	13	13	13	13	13	13	
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00	20	20	20	20	20	20	

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family

Address of Unit

Number of Bedrooms

Utility or Service	per month cost
Heating	\$
Cooking	
Other Electric	
Air Conditioning	
Water Heating	
Water	
Sewer	
Trash Collection	
Range/Microwave	
Refrigerator	
Other	
<b>Total</b>	<b>\$</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Winter Haven</b>	Unit Type Low Rise/High Rise/Garden/Walk-Up	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances					
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating						
a. Natural Gas	4	7	7	9	10	11
b. Bottle Gas	17	30	30	38	43	47
c. Oil / Electric	6	7	8	9	10	10
d. Heat Pump	3	3	3	4	4	4
Cooking						
a. Natural Gas	4	5	8	9	11	12
b. Bottle Gas	17	22	35	39	48	52
c. Oil / Electric	6	8	10	12	14	17
d. Coal / Other						
Other Electric	16	24	32	40	48	56
Air Conditioning/Heat Pump	18	21	31	42	52	63
Water Heating						
a. Natural Gas	7	10	13	16	20	24
b. Bottle Gas	31	44	57	70	87	105
c. Oil / Electric	10	15	20	25	31	36
d. Coal / Other						
Water	18	18	21	26	32	37
Sewer	25	25	32	39	46	53
Trash Collection	21	21	21	21	21	21
Range/Microwave	12	12	12	12	12	12
Refrigerator	13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00	20	20	20	20	20	20

<p><b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.</p> <p>Name of Family _____</p> <p>Address of Unit _____</p> <p>Number of Bedrooms _____</p>	Utility or Service	per month cost
	Heating	\$ _____
	Cooking	_____
	Other Electric	_____
	Air Conditioning	_____
	Water Heating	_____
	Water	_____
	Sewer	_____
	Trash Collection	_____
	Range/Microwave	_____
Refrigerator	_____	
Other	_____	
<b>Total</b>	<b>\$ _____</b>	

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Winter Haven</b>	Unit Type Row House/Town House/Semi-Detached Duplex	Date (mm/dd/yyyy)
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Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	21	30	34	43	47	51
	c. Oil / Electric	7	8	9	10	11	12
	d. Heat Pump	3	3	4	4	4	5
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric		16	26	36	50	60	70
Air Conditioning/Heat Pump		19	22	33	44	56	67
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water		18	18	21	26	32	37
Sewer		25	25	32	39	46	53
Trash Collection		21	21	21	21	21	21
Range/Microwave		12	12	12	12	12	12
Refrigerator		13	13	13	13	13	13
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		20	20	20	20	20	20

<b>Actual Family Allowances</b> To be used by the family to compute allowance. Complete below for the actual unit rented.		Utility or Service	per month cost
Name of Family _____  Address of Unit _____  Number of Bedrooms _____		Heating	\$ _____
		Cooking	_____
		Other Electric	_____
		Air Conditioning	_____
		Water Heating	_____
		Water	_____
		Sewer	_____
		Trash Collection	_____
		Range/Microwave	_____
		Refrigerator	_____
		Other	_____
		<b>Total</b>	<b>\$ _____</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – City of Winter Haven</b>	Unit Type <b>Single Family</b>	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances						
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	a. Natural Gas	7	9	10	12	14	15
	b. Bottle Gas	30	38	43	51	60	64
	c. Oil / Electric	9	10	11	13	14	15
	d. Heat Pump	4	4	4	5	6	6
Cooking	a. Natural Gas	4	5	8	9	11	12
	b. Bottle Gas	17	22	35	39	48	52
	c. Oil / Electric	6	8	10	12	14	17
	d. Coal / Other						
Other Electric	23	34	44	59	69	80	
Air Conditioning/Heat Pump	22	24	37	49	62	75	
Water Heating	a. Natural Gas	7	10	13	16	20	24
	b. Bottle Gas	31	44	57	70	87	105
	c. Oil / Electric	10	15	20	25	31	36
	d. Coal / Other						
Water	22	23	28	33	39	47	
Sewer	25	25	32	39	46	53	
Trash Collection	21	21	21	21	21	21	
Range/Microwave	12	12	12	12	12	12	
Refrigerator	13	13	13	13	13	13	
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00	20	20	20	20	20	20	

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family

Address of Unit

Number of Bedrooms

Utility or Service	per month cost
Heating	\$
Cooking	
Other Electric	
Air Conditioning	
Water Heating	
Water	
Sewer	
Trash Collection	
Range/Microwave	
Refrigerator	
Other	
<b>Total</b>	<b>\$</b>

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – Renaissance</b>	Unit Type High Rise/Garden/Apartment/Walk-Up	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances					
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas					
	b. Bottle Gas					
	c. Oil / Electric		7	8	9	10
	d. Heat Pump					
Cooking	a. Natural Gas					
	b. Bottle Gas					
	c. Oil / Electric		8	10	12	14
	d. Coal / Other					
Other Electric		24	32	40	48	56
Air Conditioning/Heat Pump		21	31	42	52	63
Water Heating	a. Natural Gas					
	b. Bottle Gas					
	c. Oil / Electric		15	20	25	31
	d. Coal / Other					
Water		17	20	23	26	30
Sewer		26	31	36	42	47
Trash Collection		17	17	17	17	17
Range/Microwave						
Refrigerator						
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00		8	8	8	8	8

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family

Address of Unit

Number of Bedrooms

Utility or Service	per month cost
Heating	\$
Cooking	
Other Electric	
Air Conditioning	
Water Heating	
Water	
Sewer	
Trash Collection	
Range/Microwave	
Refrigerator	
Other	
<b>Total</b>	\$

# Allowances for Tenant-Furnished Utilities and Other Services

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 4/30/2014)

Public Reporting Statement and Instructions on back

Locality <b>Lakeland Housing Authority – Renaissance</b>	Unit Type Semi-Detached / Duplex	Date (mm/dd/yyyy)
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Utility or Service	Monthly Dollar Allowances					
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas					
	b. Bottle Gas					
	c. Oil / Electric			9	10	11
	d. Heat Pump					
Cooking	a. Natural Gas					
	b. Bottle Gas					
	c. Oil / Electric			10	12	14
	d. Coal / Other					
Other Electric			36	50	60	
Air Conditioning/Heat Pump			33	44	56	
Water Heating	a. Natural Gas					
	b. Bottle Gas					
	c. Oil / Electric			20	25	31
	d. Coal / Other					
Water			20	23	26	
Sewer			31	36	42	
Trash Collection			17	17	17	
Range/Microwave						
Refrigerator						
Natural Gas Flat Fee 12.00 Electric Flat Fee 8.00			8	8	8	

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family \_\_\_\_\_

Address of Unit \_\_\_\_\_

Number of Bedrooms \_\_\_\_\_

Utility or Service	per month cost
Heating	\$
Cooking	
Other Electric	
Air Conditioning	
Water Heating	
Water	
Sewer	
Trash Collection	
Range/Microwave	
Refrigerator	
Other	
<b>Total</b>	<b>\$</b>



The following section compares differences from previous utility rates to current utility rates. In addition, changes are represented in percentages.

Utility services surveyed include; electric, natural gas, bottle gas/propane, water, sewage and trash removal. Additionally, included in the survey are surcharges and taxes.

**PREVIOUS AND CURRENT UTILITY RATES**

## Comparison of Current to Previous Utility Rates

### Electric

	Measurement	Rates		Difference	
		8/2012	11/2013	Amount	Percent
<b>Lakeland Electric</b>					
Energy Charge	per kwh	0.0488200	0.0488200		
Fuel Charge	per kwh	0.0423000	0.0408500		
Environmental Charge	per kwh	0.0024560	0.0026830		
Smart Grid Charge	per kwh	0.0001400	0.0001400		
	<b>Total</b>	0.0937160	0.0924930		
Florida Gross Receipts Tax	% of total	2.5%	2.5%	-0.0012230	-1.3%
Utility Tax	% of total	10.0%	10.0%		0.0%
	<b>Total</b>	12.5%	12.5%		-1.3%
<b>Difference</b>					
				<b>Amount</b>	<b>Percent</b>
Customer Charge	per month	8.00	8.00	0.00	0.0%
	<b>Total</b>	\$8.00	\$8.00		0.0%
				<b>Amount</b>	<b>Percent</b>

	Measurement	Rates		Difference	
		8/2012	11/2013	Amount	Percent
<b>City of Bartow</b>					
Energy Charge	per kwh	0.061820	0.0467000		
Fuel Charge	per kwh	0.071310	0.0792500		
	<b>Total</b>	0.133130	0.1259500		
Florida Gross Receipts Tax	% of total	2.5%	2.5%	-0.0071800	-5.4%
Sales Tax	% of total	8.0%	8.0%		0.0%
	<b>Total</b>	10.5%	10.5%		-5.4%
<b>Difference</b>					
				<b>Amount</b>	<b>Percent</b>
Customer Charge	per month	6.70	8.00	1.30	19.4%
	<b>Total</b>	\$6.70	\$8.00		19.4%
				<b>Amount</b>	<b>Percent</b>

### Natural Gas

	Measurement	Rates		Difference	
		8/2012	11/2013	Amount	Percent
<b>Peoples Gas System (TECO)</b>					
Distribution Charge	per therm	0.26782	0.26782		
Power Cost Adjustment (PCA)	per therm	0.78106	0.80106		
	<b>Total</b>	1.04888	1.06888	0.02000	1.9%
Florida Gross Receipts Tax	% of total	2.5%	2.5%		0.0%
	<b>Total</b>	2.5%	2.5%		0.0%
<b>Difference</b>					
				<b>Amount</b>	<b>Percent</b>
Customer Charge	per month	12.00	12.00	0.00	0.0%
	<b>Total</b>	\$12.00	\$12.00		0.0%
				<b>Amount</b>	<b>Percent</b>

**HOUSING AUTHORITY SERVICES**  
A Division of Housing Services Consulting group, LLC:

**Bottle Gas/Propane**

**Amerigas**  
Fuel Rate

Measurement	8/2012	11/2013
per gallon	4.25	5.00
<b>Total</b>	<b>\$4.25</b>	<b>\$5.00</b>

Difference	
Amount	Percent
\$0.75	17.6%
% of change	17.6%

**Countryside Propane**  
Fuel Rate

Measurement	8/2012	11/2013
per gallon	4.05	3.49
<b>Total</b>	<b>\$4.05</b>	<b>\$3.49</b>

Difference	
Amount	Percent
-\$0.56	-13.8%
% of change	-13.8%

**Water & Sewer**

**City of Auburndale**

Water Rate 4001-12,000  
Water Rate 12,001-35,000

Measurement	Rates	
	8/2012	11/2013
per 1000 gal	1.60	1.73
per 1000 gal	2.40	2.60
<b>Total</b>	<b>\$4.00</b>	<b>\$4.33</b>

Difference	
Amount	Percent
0.33	8.3%
0.72	8.1%
% of change	0.0%

Water Minimum Charge

per month	8.86	9.58
<b>Total</b>	<b>\$8.86</b>	<b>\$9.58</b>

% of total	10.0%	10.0%
<b>Total</b>	<b>10.0%</b>	<b>10.0%</b>
% of change		16.4%

Tax

% of total	10.0%	10.0%
<b>Total</b>	<b>10.0%</b>	<b>10.0%</b>

Sewer Charge  
Stormwater Fee

per month	31.30	33.85
per month	0.75	0.75
<b>Total</b>	<b>\$32.05</b>	<b>\$34.60</b>

Difference	
Amount	Percent
2.55	8.0%
% of change	8.0%

**City of Bartow**

Water Rate 0-6000  
Water Rate 6001-8000  
Water Rate over 8000

Measurement	Rates	
	8/2012	11/2013
per 1000 gal	1.85	2.16
per 1000 gal	2.53	2.95
per 1000 gal	3.42	3.99
<b>Total</b>	<b>\$7.80</b>	<b>\$9.10</b>

Difference	
Amount	Percent
1.30	16.7%
1.34	16.7%
% of change	0.0%

Water Minimum Charge

per month	8.01	9.35
<b>Total</b>	<b>\$8.01</b>	<b>\$9.35</b>

% of total	10.0%	10.0%
<b>Total</b>	<b>10.0%</b>	<b>10.0%</b>
% of change		33.4%

Tax

% of total	10.0%	10.0%
<b>Total</b>	<b>10.0%</b>	<b>10.0%</b>

Sewer Charge  
Sewer Minimum Charge

per 1000 gal	1.78	1.78
per month	21.32	21.32
<b>Total</b>	<b>\$23.10</b>	<b>\$23.10</b>

Difference	
Amount	Percent
0.00	0.0%
% of change	0.0%

**Rates**

HOUSING AUTHORITY SERVICES  
A Division of Housing Services Consulting group, LLC.

**City of Haines City**

	Measurement	8/2012	11/2013	Difference	
				Amount	Percent
Water Consumption Charge	per 1000 gal	0.75	0.77		
Water Consumption Charge	per 1000 gal	0.98	1.00		
Water Consumption Charge	per 1000 gal	1.50	1.54		
	<b>Total</b>	<b>\$3.23</b>	<b>\$3.31</b>		
Water Base Service Charge	per month	9.29	9.51	0.08	2.5%
	<b>Total</b>	<b>\$9.29</b>	<b>\$9.51</b>	<b>0.22</b>	<b>2.4%</b>
Tax	% of total	10.0%	10.0%		0.0%
	<b>Total</b>	<b>10.0%</b>	<b>10.0%</b>	<b>% of change</b>	<b>4.8%</b>

	Measurement	8/2012	11/2013	Difference	
				Amount	Percent
Wastewater Consump. Charge	per 1000 gal	4.83	4.95		
	<b>Total</b>	<b>4.83</b>	<b>4.95</b>	<b>0.12</b>	<b>2.5%</b>
Wastewater Base Ser. Charge	per month	17.06	17.47	0.41	2.4%
	<b>Total</b>	<b>\$17.06</b>	<b>\$17.47</b>	<b>% of change</b>	<b>4.9%</b>

**Rates**

**City of Lake Wales**

	Measurement	8/2012	11/2013	Difference	
				Amount	Percent
Water Vol.Chg. 0-5000	per 1000 gal	2.24	2.36		
Water Vol.Chg. 5001-10,000	per 1000 gal	3.03	3.19		
Water Vol. Chg. 10,000-20,000	per 1000 gal	4.70	4.94		
	<b>Total</b>	<b>\$9.97</b>	<b>\$10.49</b>		
Water Serv. Availability Chg.	per month	5.66	5.95	0.52	5.2%
	<b>Total</b>	<b>\$5.66</b>	<b>\$5.95</b>	<b>0.29</b>	<b>5.1%</b>
Tax	% of total	10.0%	10.0%		0.0%
	<b>Total</b>	<b>10.0%</b>	<b>10.0%</b>	<b>% of change</b>	<b>10.3%</b>

	Measurement	8/2012	11/2013	Difference	
				Amount	Percent
Sewer Vol. Chg. 0-5000	per 1000 gal	2.64	2.78		
Sewer Vol. Chg. Over 5000	per 1000 gal	4.63	4.87		
	<b>Total</b>	<b>7.27</b>	<b>7.65</b>	<b>0.38</b>	<b>5.2%</b>
Sewer Serv. Availability Chg.	per month	20.10	21.12	1.02	5.1%
	<b>Total</b>	<b>\$20.10</b>	<b>\$21.12</b>	<b>% of change</b>	<b>5.1%</b>

HOUSING AUTHORITY SERVICES  
A Division of Housing Services Consulting group, LLC.

	Measurement	Rates		Difference	
		8/2012	11/2013		
<b>City of Lakeland</b>					
Water Consump.0-7000	per 1000 gal	1.76	1.87		
Water Consump.7001-12,000	per 1000 gal	2.16	2.30		
Water Consump. 12,001-19,000	per 1000 gal	2.71	2.88		
	<b>Total</b>	\$6.63	\$7.05		
Water Minimum Charge	per month	7.49	7.99	0.42	6.3%
	<b>Total</b>	\$7.49	\$7.99	0.50	6.7%
Tax	% of total	10.0%	10.0%		0.0%
	<b>Total</b>	10.0%	10.0%	% of change	13.0%
<b>Wastewater Vol. Charge</b>					
	per 1000 gal	3.25	3.44		
	<b>Total</b>	3.25	3.44		
Wastewater Fixed Chg (single)	per 1000 gal	14.83	15.33	0.19	5.8%
Wastewater Fixed Chg (multi)	per month	12.16	13.18	1.52	5.6%
	<b>Total</b>	\$26.99	\$28.51	% of change	11.5%

	Measurement	Rates		Difference	
		8/2012	11/2013		
<b>Polk County Utilities</b>					
Water Usage 0-3000	per 1000 gal	1.67	1.75		
Water Usage 3001-10,000	per 1000 gal	2.22	2.33		
Water Usage 10,001-20,000	per 1000 gal	4.41	4.63		
	<b>Total</b>	\$8.30	\$8.71		
Water Base Charge	per month	8.79	9.23	0.41	4.9%
	<b>Total</b>	\$8.79	\$9.23	0.44	5.0%
Tax	% of total	10.0%	10.0%		0.0%
	<b>Total</b>	10.0%	10.0%	% of change	9.9%
<b>Wastewater Usage 0-7000 cap</b>					
	per 1000 gal	5.88	6.17		
	<b>Total</b>	5.88	6.17	0.29	4.9%
Wastewater Base Charge	per month	32.78	34.42	1.64	5.0%
	<b>Total</b>	\$32.78	\$34.42	% of change	9.9%

HOUSING AUTHORITY SERVICES  
A Division of Housing Services Consulting group, LLC.

<i>City of Winter Haven (Single)</i>	<i>Measurement</i>	<i>Rates</i>		<i>Difference</i>	
		8/2012	11/2013		
Water Usage 1-1000	per 1000 gal	1.59	1.72		
Water Usage 1001-2000	per 1000 gal	1.76	1.89		
Water Usage 2001-3000	per 1000 gal	2.05	2.21		
Water Usage 3001-5000	per 1000 gal	1.81	1.95		
Water Usage 5001-10,000	per 1000 gal	3.06	3.25		
Water Usage 10,001-15,000	per 1000 gal	3.24	4.48		
<b>Total</b>		<b>\$13.51</b>	<b>\$15.50</b>		
Administration Charge	per month	2.45	2.63	<i>Amount</i>	<i>Percent</i>
Water Base Charge	per month	5.45	5.85	1.99	14.7%
<b>Total</b>		<b>\$7.90</b>	<b>\$8.48</b>	0.58	7.3%
Tax	% of total	10.0%	10.0%		0.0%
<b>Total</b>		<b>10.0%</b>	<b>10.0%</b>	% of change	22.1%
Sewer Usage 0-1000	per 1000 gal	3.82	4.10	<i>Difference</i>	
Sewer Usage 1001-2000	per 1000 gal	4.09	4.39		
Sewer Usage 2001-3000	per 1000 gal	4.89	5.25		
Sewer Usage 3001-14,000 cap	per 1000 gal	4.25	4.57		
<b>Total</b>		<b>\$17.05</b>	<b>\$18.31</b>	<i>Amount</i>	<i>Percent</i>
Sewer Base Charge	per month	7.71	8.27	1.26	7.4%
<b>Total</b>		<b>\$7.71</b>	<b>\$8.27</b>	0.56	7.3%
				% of change	14.7%

<i>Winter Haven (Multi)</i>	<i>Measurement</i>	<i>Rates</i>		<i>Difference</i>	
		8/2012	11/2013		
Water Usage Chg 0-5000	per 1000 gal	1.81	1.95		
Water Usage Chg 5001-10,000	per 1000 gal	3.06	3.28		
Water Usage Chg 10,001-15,000	per 1000 gal	3.24	3.48		
<b>Total</b>		<b>\$8.11</b>	<b>\$8.71</b>	<i>Amount</i>	<i>Percent</i>
Administrative Charge	per month	\$2.45	\$2.63	0.60	7.4%
Water Base Charge	per month	6.01	6.45	0.44	7.3%
<b>Total</b>		<b>\$6.01</b>	<b>\$6.45</b>		0.0%
Tax	% of total	10.0%	10.0%		
<b>Total</b>		<b>10.0%</b>	<b>10.0%</b>	% of change	14.7%
Sewer Usage Charge	per 1000 gal	4.25	4.57	<i>Amount</i>	<i>Percent</i>
<b>Total</b>		<b>4.25</b>	<b>4.57</b>	0.32	7.5%
Sewer Base Charge	per month	8.47	9.09	0.62	7.3%
<b>Total</b>		<b>\$8.47</b>	<b>\$9.09</b>	% of change	7.3%

HOUSING AUTHORITY SERVICES  
A Division of Housing Services Consulting group, LLC.

**Trash Collection**

	<b>Rates</b>		<b>Difference</b>		
		8/2012	11/2013	Amount	Percent
<b>City of Auburndale</b>					
Garbage and Refuse	per month	14.75	15.65		
	<b>Total</b>	<b>\$14.75</b>	<b>\$15.65</b>	<b>\$0.90</b>	<b>6.1%</b>
				<b>% of change</b>	<b>6.1%</b>

	<b>Rates</b>		<b>Difference</b>		
		8/2012	11/2013	Amount	Percent
<b>City of Bartow</b>					
Garbage	per month	18.75	18.75		
	<b>Total</b>	<b>\$18.75</b>	<b>\$18.75</b>	<b>\$0.00</b>	<b>0.0%</b>
				<b>% of change</b>	<b>0.0%</b>

	<b>Rates</b>		<b>Difference</b>		
		8/2012	11/2013	Amount	Percent
<b>City of Haines City</b>					
Garbage and Refuse	per month	17.27	19.67		
	<b>Total</b>	<b>\$17.27</b>	<b>\$19.67</b>	<b>\$2.40</b>	<b>13.9%</b>
				<b>% of change</b>	<b>13.9%</b>

	<b>Rates</b>		<b>Difference</b>		
		8/2012	11/2013	Amount	Percent
<b>City of Lake Wales</b>					
Solid Waste	per month	14.50	18.32		
Recycling	per month	2.00	1.06		
	<b>Total</b>	<b>\$16.50</b>	<b>\$19.38</b>	<b>\$2.88</b>	<b>17.5%</b>
				<b>% of change</b>	<b>17.5%</b>

	<b>Rates</b>		<b>Difference</b>		
		8/2012	11/2013	Amount	Percent
<b>City of Lakeland</b>					
Solid Waste	per month	14.50	14.50		
Recycling	per month	2.00	2.00		
	<b>Total</b>	<b>\$16.50</b>	<b>\$16.50</b>	<b>\$0.00</b>	<b>0.0%</b>
				<b>% of change</b>	<b>0.0%</b>

	<b>Rates</b>		<b>Difference</b>		
		8/2012	11/2013	Amount	Percent
<b>City of Winter Haven</b>					
Garbage Collection	per month	18.07	18.98		
Recycling	per month	2.15	2.26		
	<b>Total</b>	<b>\$20.22</b>	<b>\$21.24</b>	<b>\$1.02</b>	<b>5.0%</b>
				<b>% of change</b>	<b>5.0%</b>

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

**1. Describe Board Action requested and why it is necessary:**

**Re: Resolution # 13-1371**

The Board of Commissioners is requested to approve the 2014 Annual Budget as presented by staff.

**2. Who is making request:**

A. Entity: LHA

B. Project: Approving the 2014 Annual Budget

C. Originator: Eva Hall/Carlos Pizarro

**3. Cost Estimate:**

N/A

**Narrative:**

The Board of Commissioners provides oversight and direction to the Housing Authority of the City of Lakeland. Annually, the Board reviews, comments, and when satisfied, approves the Annual Budget for: the Central Office Cost Center; the Section 8 program; the Public Housing program, which includes AMP 1 and AMP 4; as well as the budgets for the Housing Authority of the City of Lakeland's other instrumentalities. This resolution provides for approval of the 2014 budget.



**RESOLUTION NO. 13-1371**

**APPROVAL OF THE 2014 ANNUAL BUDGET**

**WHEREAS**, the Board of Commissioners of the Housing Authority of the City of Lakeland, Florida has reviewed the proposed 2014 Annual Budget for: the Central Office Cost Center; the Section 8 program; the Public Housing program, which includes AMP 1 and AMP 4; and the other instrumentalities for which the Board of Commissioners provide oversight and direction; and

**WHEREAS**, the Board of Commissioners has determined that the proposed expenditures are necessary for the efficient and effective operation of the Housing Authority of the City of Lakeland for the purpose of providing affordable housing to low-income families; and

**WHEREAS**, the proposed expenditures will be consistent with the provisions of law and the Annual Contributions Contract;

**NOW THEREFORE, BE IT RESOLVED** that the Board of Commissioners of the Housing Authority of the City of Lakeland hereby approves the 2014 Annual Budget as presented by staff.

**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. 13-1371 dated December 16, 2013.

Attested by:

\_\_\_\_\_  
Benjamin Stevenson, Secretary

\_\_\_\_\_  
Michael A. Pimentel, Chair

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

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

**Re: Resolution # 13-1372**

The Board of Commissioners is requested to approve the above-referenced resolution to authorize the Executive Director to enter into a task order-driven, indefinite delivery, indefinite quantity contract with each: *Baker Tilly Virchow Krause, LLP*; *IFH Solutions, Inc.*; and *TAG Associates of Florida, LLC*.

**2. Who is making request:**

- A. Entity: The Housing Authority of the City of Lakeland
- B. Project: Provision of Financial Advisor Services
- C. Originator: Valerie Brown

**3. Cost Estimate:**

Not-to-exceed \$500,000.

**Narrative:**

In order to both enhance the financial stability and to increase the rate of financial growth of the Housing Authority of the City of Lakeland, staff--with the concurrence of the Board of Commissioners--issued a Request for Proposals for *Financial Advisor Services*.

The Request for Proposals (RFP), which was issued on October 09, 2013, was emailed to 24 professional firms. Notice of the RFP was advertised in the *Lakeland Ledger*. It 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*.

Ten responses to the RFP were received prior to the October 23, 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 five of the ten firms:

- *Baker Tilly Virchow Krause, LLP* (Madison, Wisconsin)
- *CSG Advisors, Inc.* (San Francisco, California)
- *Duvernay & Brooks, LLC* (New York, New York)
- *IFH Solutions, Inc.* (Canton, Georgia)
- *TAG Associates of Florida, LLC* (Celebration, Florida)

indicated to the review team that these firms had the ability to best serve the anticipated needs of the Housing Authority. Therefore, all five firms were invited to be individually interviewed by the three-member review team on December 04, 2013.

On December 03, 2013, the interview team was advised by *Duvernay & Brooks, LLC* that, with regret, it decided to decline its opportunity to interview.

On December 04, 2013, the team interviewed the remaining four firms. The next day, the interview team met and each member provided his/her evaluation of each interviewed firm. (A copy of the scoring matrix is provided after the *Resolution*.)

In the ensuing discussion, the interview team determined that each of the three highest-ranked firms possessed expertise in three different areas that would best serve the anticipated needs of the Housing Authority. Therefore, staff is recommending that the Board of Commissioners approve contracting with these firms at its December 16, 2013 meeting.

## RESOLUTION NO. 13-1372

### APPROVING THE AWARD OF CONTRACTS FOR FINANCIAL ADVISOR SERVICES

**WHEREAS**, the Housing Authority of the City of Lakeland desires to both enhance its financial stability and to increase the rate of its financial growth; and

**WHEREAS**, on October 09, 2013, the staff of the Housing Authority of the City of Lakeland issued a Request for Proposals for the provision of *Financial Advisor Services*; and

**WHEREAS**, on October 23, 2013, responses were received from ten professional firms interested in providing the above services to the Housing Authority of the City of Lakeland; and

**WHEREAS**, after ranking these ten responses, the five highest-ranked firms (see attached matrix) were invited to be individually interview by the staff review committee; and

**WHEREAS**, the results of these interviews indicated that the three highest-ranked firms (see attached matrix) possess expertise in three different areas that would best serve the anticipated needs of the Housing Authority of the City of Lakeland;

**NOW THEREFORE, BE IT RESOLVED** that the Board of Commissioners of the Housing Authority of the City of Lakeland hereby approves the award of a task order-driven, indefinite delivery, indefinite quantity contract for *Financial Advisor Services* for each: ***Baker Tilly Virchow Krause, LLP; IFH Solutions, Inc.; and TAG Associates of Florida, LLC*** effective January 01, 2014 and ending December 31, 2015 with the combined, not-to-exceed value of the three contracts of \$500,000, with the right to renew each of the three contracts for an additional three-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. 13-1372 dated December 16, 2013.

Attested by:

\_\_\_\_\_  
Benjamin Stevenson, Secretary

\_\_\_\_\_  
Michael A. Pimentel, Chair

**PROPOSAL RATING SHEET MATRIX  
FINANCIAL ADVISOR SERVICES**

CRITERIA	EVALUATOR	RESPONDENTS									
		Baker Tilly	CliftonLarsonAllen	Cohn Reznick	CSG Advisors	Duvernay & Brooks	Housing and Financial Services	IFH Solutions	Milner & Caringella	Recap Real Estates Advisors	TAG Associated of Florida
<i>Information requested under Tab 1 – Experience</i> (Possible 0 to 35 points)	A	32.5	15.0	27.5	25.0	20.0	7.5	20.0	20.0	17.5	22.5
	B	30.0	30.0	31.0	28.0	35.0	5.0	20.0	29.0	26.0	35.0
	C	25.0	30.0	30.0	30.0	30.0	5.0	34.0	15.0	29.0	28.0
<i>Information requested under Tab 2 – Staff Experience and Organization</i> (Possible 0 to 20 points)	A	20.0	17.0	17.0	17.0	17.0	10.0	17.0	17.0	17.0	20.0
	B	12.0	10.0	10.0	12.0	20.0	5.0	15.0	18.0	18.0	19.0
	C	15.0	10.0	20.0	20.0	20.0	5.0	20.0	20.0	18.0	19.0
<i>Information requested under Tab 3--Capacity to Provide Professional Services in a Timely Manner</i> (Possible 0 to 25 points)	A	25.0	25.0	25.0	25.0	12.5	0.0	25.0	12.5	12.5	25.0
	B	15.0	8.0	18.0	20.0	12.0	5.0	15.0	8.0	15.0	23.0
	C	20.0	25.0	15.0	25.0	19.0	0.0	25.0	15.0	18.0	23.0

CRITERIA	EVALUATOR	Baker Tilly	CliftonLarsonAllen	Cohn Reznick	CSG Advisors	Duvernay & Brooks	Housing and Financial Services	IFH Solutions	Millner & Caringella	Recap Real Estates Advisors	TAG Associated of Florida
		<i>Information requested under Tab 4--Fee Schedule (0 to 20 points)</i>	A	20.0	20.0	10.0	20.0	20.0	20.0	20.0	20.0
	B	12.0	18.0	12.0	12.0	18.0	15.0	15.0	18.0	12.0	18.0
	C	10.0	15.0	0.0	20.0	16.0	20.0	20.0	15.0	10.0	19.0
<i>Information requested under Tab 5--Submission of Required Documents (No points to be awarded) (Y or N)</i>	A	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
	B	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
	C	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
<b>TOTAL</b>		236.5	223.0	215.5	254.0	239.5	97.5	246.0	207.5	213.0	271.5
<b>AVERAGE SCORE</b>		78.83	74.33	71.83	84.67	79.83	32.50	82.00	69.17	71.00	90.50
<b>RANKING</b>		5th	6th	7th	2nd	4th	10th	3rd	9th	8th	1st

**INTERVIEW RATING MATRIX  
FINANCIAL ADVISOR SERVICES**

CRITERIA	RATER	INTERVIEWED FIRMS			
		BAKER TILLY	CSG ADVISORS	IFH SOLUTIONS	TAG ASSOCIATES
1. Discuss your firm’s experience in assisting public housing authorities (PHAs) in developing a strategy to repay short and long-term debt. Describe whether or not your firm assisted any of these PHAs in changing their designation from “troubled” to “standard” performer, “standard” to “high” performer, or has your firm assisted a PHA from getting out of receivership? State which team members listed within your proposal performed these tasks. Outline whether or not these individuals were actual housing authority employees, outside consultants serving in the role of staff augmentation, or members of a receiver team. Specify whether or not the strategy developed was implemented before or after HUD mandated that PHAs convert to the asset management model. (0-30 points)	A	15	15	30	25
	B	26	20	30	27
	C	26	17	29	30
2. Discuss whether or not any of the team members listed within your proposal have experience with: Yardi, LOCCS, and PIC. For team members with: Yardi, LOCCS, and/or PIC experience, outline each member’s proficiency with the specific software. (0-10 points)	A	6	8	10	8
	B	2	5	10	6
	C	6	9	8	9
3. Describe your firm’s experience in assisting PHAs that self-develop. A key item for discussion will be your firm’s experience in determining the taxability of blended component units versus related organizations. Outline which team members listed within your proposal has this experience and specify whether or not these individuals were actual housing authority employees, outside consultants serving in the role of staff augmentation, or members of a receiver team. (0-15 points)	A	10	8	15	15
	B	9	7	12	12
	C	14	6	15	15

CRITERIA	RATER	INTERVIEWED FIRMS			
		BAKER TILLY	CSG ADVISORS	IFH SOLUTIONS	TAG ASSOCIATES
4. Outline how your firm assisted PHAs or third party developers in creating an exit strategy for tax credit properties approaching the end of the compliance period. Describe how the exit strategy addressed mixed-finance projects with emerging capital needs and outstanding deferred developer fees. State which team members listed within your proposal performed these tasks. Outline whether or not these individuals were actual housing authority employees, outside consultants serving in the role of staff augmentation, or members of a receiver team. (0-20 points)	<i>A</i>	20	15	15	15
	<i>B</i>	16	15	18	17
	<i>C</i>	19	14	20	18
5. Describe your firm's contingency plans to address the loss of any key team members listed above. (0-10 points)	<i>A</i>	10	8	8	10
	<i>B</i>	0	0	0	0
	<i>C</i>	10	6	10	10
6. Has your company work with a housing management company to further develop their business model so the management company can increase their net operating income through securing other third party contracts. ( 0-15 points)	<i>A</i>	10	10	10	15
	<i>B</i>	12	10	14	14
	<i>C</i>	15	7	15	15
	<b>Total</b>	226	180	269	261
	<b>Average</b>	75.3	60.0	89.7	87.0
	<b>RANK</b>	<i>3rd</i>	<i>4th</i>	<i>1st</i>	<i>2nd</i>



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

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

**Re: Resolution # 13-1373**  
The Board of Commissioners is requested to approve the two attached revisions to the Housing Authority of the City of Lakeland's *Employee Handbook*.

**2. Who is making request:**

A. Entity: the Housing Authority of the City of Lakeland  
B. re: The *Employee Handbook*:  
    Revising item *708 Resignation*  
    Adding item *710 Reduction in Force*  
C. Originator: Benjamin Stevenson

**3. Cost Estimate:**

n/a

**Narrative:**

A viable organization periodically reviews its policies and procedures and updates them as evolving circumstances require. The Human Resource staff of the Housing Authority of the City of Lakeland reviewed the current *Employee Handbook* and determined that certain modifications and additions are necessary. Upon approval of this resolution by the Board of Commissioners, the *Employee Handbook* will be modified as follows:

- Modifying item *708 Resignation*--The language in the current handbook is insufficient to address the various situations in which an employee would leave the employ of the Housing Authority of the City of Lakeland. The attached revised item *708* will be retitled as *Types of Separation* and will provide more comprehensive language to address the different types of employee separations from the Housing Authority.
- Adding item *710 Reduction in Force*--In light of the experiences of recent years, the Housing Authority of the City of Lakeland has and continues to experience decreased financial resources. As a result, the Housing Authority may be compelled to reduce its expenditures by reducing the number of Housing Authority staff. The addition of this item to the *Employee Handbook* will provide guidance in the event that the Housing Authority finds it necessary to reduce its workforce.

**RESOLUTION NO. 13-1373**

**APPROVING TWO REVISIONS TO THE EMPLOYEE HANDBOOK**

**WHEREAS**, the Housing Authority of the City of Lakeland approved its current employee handbook in November 2011; and

**WHEREAS**, the Human Resources staff of the Housing Authority of the City of Lakeland reviewed the text in the current handbook and determined that two revisions were needed; and

**WHEREAS**, specifically, the language in the current handbook is insufficient to address the various situations in which an employee would leave the employ of the Housing Authority of the City of Lakeland; and

**WHEREAS**, specifically, the reduced amount of financial resources made available to the Housing Authority of the City of Lakeland may necessitate the Housing Authority to reduce its expenditures by reducing the number of its staff; and

**WHEREAS**, the staff of the Housing Authority of the City of Lakeland generated revised language for item **708** as well as language for an additional item, item **710**, (text attached to this resolution) to the *Employee Handbook*;

**NOW THEREFORE, BE IT RESOLVED** that the Board of Commissioners of the Housing Authority of the City of Lakeland hereby approves the attached modifications to item **708** as well as adding the language of new item **710** to the *Employee Handbook*.

**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 13-1373 dated December 16, 2013.

Attested by:

\_\_\_\_\_  
Benjamin Stevenson, Secretary

\_\_\_\_\_  
Michael A. Pimentel, Chair

*The original language approved in November 2011 currently reads:*

### **708 Resignation**

Effective Date: 1/1/2012

Resignation is a voluntary act initiated by the employee to terminate employment with LHA. Although advance notice is not required, LHA requests at least 2 weeks' written resignation notice from all employees.

Prior to an employee's departure, an exit interview will be scheduled to discuss the reasons for resignation and the effect of the resignation on benefits.

If an employee does not provide advance notice as requested, the employee will be considered ineligible for rehire.

*The revised language which will replace the above in its entirety will read:*

### **708 Types of Separation**

Effective Date: 1/1/2014

Separation of employees from positions shall be designated as one of the following and shall be accomplished in the manner indicated: resignation; abandonment of position; layoff; disability; death; retirement; dismissal; and reduction in force.

#### Resignation

To resign in good standing, a non-exempt employee is required to give a written notice to his/her immediate supervisor, at least, two (2) weeks prior to the effective date of his/her resignation. An exempt/managerial/Information Technology employee is required to give, at least, a thirty (30) calendar days written notice to his/her immediate supervisor. Failure to comply with this rule shall be entered on the service record of the employee and will render the employee ineligible for rehire.

#### Abandonment of Position

An employee who is absent from work without authorization for three (3) or more consecutive workdays and fails to report his/her absences shall be deemed to have abandoned the position. Should this situation arise, the following will occur:

- The Office of Human Resources will send an overnight letter to the employee proposing termination and providing the employee three (3) days in which to contact either his/her supervisor or an Office of Human Resources representative.
- The employee will be provided with an opportunity to respond with any extenuating circumstances that prevented the employee from returning to work or contacting the appropriate individuals at LHA.
- If the employee responds to this request, the Office of Human Resources will review the circumstance and make a determination on whether to proceed with the termination or allow the employee to return to his or her position.

- If the employee does not respond within the time provided, his or her employment with LHA will be terminated effective the proposed separation date.
- A final termination notice is forwarded to the employee.
- Should the employee have any unsettled accounts or unreturned property, LHA reserves the right to offset any funds due the employee. If the funds are not sufficient, this information will be forwarded to the Executive Director or his/her designee for further action.
- The employee will be considered ineligible for rehire.

### Layoff

The Executive Director may identify a number of positions, by job title, to be vacated which will result in the layoff of one or more employees when the Executive Director deems it necessary because of a shortage of funds or work, or other material changes in the duties of organization, or for related reasons which do not reflect discredit upon the service of the employee. Any employee who has been separated for a period of twelve (12) months or less, because of a layoff, shall be considered for reinstatement if the employee meets the minimum qualifications for any new openings. Employees who are reinstated shall serve a probationary period of six (6) months. The layoff of employees shall be made based on performance evaluations with outstanding performance outweighing satisfactory performance, etc.

### Disability

An employee may be separated for disability when he or she can no longer perform the essential functions of the job with or without a reasonable accommodation in accordance with the requirements of the ADA. Individuals who are injured on the job may or may not be protected by the ADA. Such instances must be evaluated on a case-by-case basis. In all such cases, however, the disability must be supported by medical evidence acceptable to the Executive Director. LHA will take all necessary precautions to ensure that it is in compliance with the ADA in all such instances.

### Death

When an individual dies while employed by LHA, all compensation due shall be paid to a legal representative of the employee's estate or any other properly designated individual.

### Dismissal

The Executive Director or his/her designee may dismiss an employee as outlined in item **405 Employment Termination** and other sections of this Handbook. The employee shall be furnished notice of dismissal in writing. The employee has the right to answer the charge in accordance with the LHA's grievance procedure.

*The addition of item 710 will read:*

### **710 Reduction in Force**

Effective Date: 1/1/2014

#### Purpose and Scope:

The purpose of this policy is to prescribe the manner in which exempt and non-exempt employees are released in an equitable manner should a reduction in force become necessary. A reduction in force may require the separation, involuntary demotion, reassignment, or reduction in work hours of the effected employees.

LHA may implement a reduction in force for one or more of the following reasons:

- reorganization;
- work shortage;
- loss of funding; or
- outsourcing/privatization

#### Management Decisions:

LHA shall determine the following items prior to developing the Reduction in Force plan:

- What is the reason(s) for the reduction in force?
- What area(s) are to be impacted by the Reduction in Force program?
- What position title(s) within the program area(s) are to be affected?
- How many positions in each position title(s) are to be eliminated?

#### Program Area(s)

LHA shall determine which program area(s) the reduction in force will impact. The program area may be: the entire organization, a department, a unit, or a geographical location.

#### Program Group(s)

LHA shall determine the program group(s) based on the position title(s) within the program area(s) that the reduction in force would affect. If the reduction in force is to apply to more than one position title, each position title will be treated separately.

#### Position Identification

LHA shall identify the position(s) within the program area(s) and program group(s) by identifying the following information:

- Position title; and
- Total number of positions in the position title within the program area to be eliminated

#### Reduction in Force Determinations

In the event LHA finds it necessary to reduce the number of employees in any job classification, probationary, part-time and temporary employees in that job classification will be released first. Ability to perform the duties of the

classification, job performance, absenteeism, and seniority shall be factors in determining the order of layoff of employees.

#### Sequence of Reduction in Force

The order of the reduction in force of employees in each position title(s) shall be based upon a schedule of retention points for each employee as defined in the Reduction in Force plan. If two or more employees affected by a reduction in force have the same number of retention points, the employees' individual performance and attendance will determine the order of the employees affected.

#### Retention of Necessary Qualifications

No employee with a lower number of retention points shall be retained in preference to another employee in a program area(s) and group(s) with a higher number of retention points except when LHA determines that a *Retention of Necessary Qualifications* applies.

When *Retention of Necessary Qualifications* is to be used in a Reduction in Force plan, justification for this retention must be documented and afterwards approved by the Executive Director prior to submitting the request for a Reduction in Force Plan to Office of Human Resources. The Office of Human Resources will retain documentation to support any retentions made on this basis.

#### Writing and Implementation of the Reduction in Force Plan

Once the Executive Director has made the decisions outlined above, the Office of Human Resources shall develop and implement the Reduction in Force Plan. At minimum:

- The plan shall include the development of a:
  - Schedule of retention points for each employee
  - Sample of the letter that will be provided to each affected employee
  - Schedule of individual meetings with each affected employee
- The Reduction in Force shall be implemented during the meeting with each affected employee. During this meeting, the employee will be:
  - Advised of the reason for the Reduction in Force
  - Provided with an organizational chart
  - Provided with a copy of the Reduction in Force policy
  - Provided with a signed-letter advising the employee of his or her employment separation and the possible resources that the employee may access during his or her transition.

#### Grievance Rights

Any employee who is affected by a reduction in force has the right to file a grievance and to appeal to the Office of Human Resources only if the grievance or appeal is based on improper or inconsistent application of a Reduction in Force policy or plan. After review of the employee's appeal, the Office of Human Resources shall make its recommendations to the Executive Director.

## **Secretary's Report December 2013**

### **Payroll and Human Resources Services**

At the November 2013 Board meeting, commissioners requested a written summary of the services to be provided by the Payroll and Human Resources Services consultant that would be replacing ADP. Below is a summary of the services to be provided:

#### Handbooks

- English Employee Handbook
- Spanish Employee Handbook
  - Professional Printing & Binding
  - Federal and state posters
  - Constant Review of Federal and State policies with Corresponding Updates
  - Legally Reviewed by Fisher & Philips

#### Manuals

- Interview & Selection Manuals
- Performance Appraisals
- Supervisor Procedures

#### Forms & Templates

- Job descriptions
- Performance Reviews
- Employee Discipline forms
- Access to hundreds other forms and template

#### Training & Development webinars

- Non-Harassment
- Fair Labor Standards Act (FLSA)
- Effective Employee Discipline and Termination
- Top 10 HR Issues
- Hiring Practices
- Performance Appraisals

#### Safety & Loss Control

- Accident Investigation
- Back Safety
- Bio-Medical Waste
- Blood borne Pathogens
- Chemical Safety (corrosive liquids)
- Compressed Gas
- Confined Space
- Construction
- Crisis and Disaster Planning

## **Secretary's Report**

### **December 2013**

- Darkroom Safety
- Demolition
- Electrical Safety
- Emergency Action and Fire prevention Planning
- Emergency Exits and Egress
- Ergonomics
- Eyebath and Safety Showers
- Fall Protection(Fall Arrest Systems)
- Forklift
- Hand and Portable Powered Tools
- Hazard Communication
- Housekeeping
- Injury & Illness Prevention Program
- Lockout/tag-out procedures
- Material Handling
- Overhead Cranes and Hoists
- Powered Platforms
- Safe Driving
- Spill Prevention
- Using Contractors
- Vehicle Mounted, Elevated & Rotating Work Platforms (Boom Trucks)
- Ventilation
- Walking and Working Surfaces
- Water Conservation
- Welding, Cutting and Brazing

### **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 and the recent federal government shutdown 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



**Secretary's Report  
December 2013**

anticipation of increased HAP. Staff continues to work with the Miami Field office to correct this item. LHA has applied for set aside funding for additional HAP as well. Staff is also working with other PHA's to absorb vouchers currently being paid by LHA which is also result in a savings for LHA. Staff continues to monitor this item as well as the impact of the Sequestration Budget and the recent federal government shutdown on the Section 8 program at LHA.

**HOPE VI Funds Expenditure**

HUD would like for LHA to obligate the HOPE VI funds as quickly as possible. Staff submitted a Development Proposal to use the HOPE VI funds to construct some affordable rental housing units on the vacant lots at the HOPE VI site. Since that time, staff has had follow-up conversations with Juan Miranda of HUD-Miami regarding the unexpended HOPE VI funds. Staff has provided responses to their follow-up questions. We are waiting on HUD approval of the proposal. Details will be provided for the Board at a later date.

**Annual Budget/Agency Update**

A workshop on the 2014 Agency Budget was held on November 7, 2013 at 5:30 pm. Each commissioner was given a copy of the budget for their review. A resolution requesting commissioner approval of the budget is included with this month's Board packet.

A copy of the Corrective Action Plan is submitted to the HUD-Miami office for review and comment on a monthly basis. 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 are 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.

The LHA Recovery Plan update is a standard part of the Board agenda.

**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.

**Secretary's Report  
December 2013**

**Agency Plan**

LHA staff has completed work on the Agency Plan that was submitted to HUD in October 2013. The Plan was approved by the LHA Board of Commissioners at the October 16, 2013 Board meeting. 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 the Resident Advisory Board, 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 October 9, 2013 at the LHA central office. After completion of the public process, the Plan was submitted to the U.S. Department of Housing and Urban Development Miami office for review and approval.

**Meetings**

I also participated as a guest speaker on Career Day at the Donald Woods Opportunity Center. I shared some of my government experiences with the students.

I also attended County Government Day with the 31<sup>st</sup> Class of Leadership Lakeland. I continue to learn more about Lakeland.

Respectfully submitted,

*Benjamin Stevenson*

Secretary