

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ
AGENDA OF THE REGULAR BOARD MEETING
May 22, 2024 at 11:00 a.m.
HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ
2160 41st Avenue, Capitola, CA 95010

1. Roll Call

HOUSING AUTHORITY BOARD OF COMMISSIONERS:

Chairperson Andy Schiffrin	4 year term expires, March 17, 2027
Vice Chairperson Providence Martinez Alaniz	4 year term expires, February 10, 2027
Commissioner Carol Berg	4 year term expires, May 21, 2025
Commissioner Ligaya Eligio	2 year term expires, October 18, 2024
Commissioner Annette Melendrez	4 year term expires, September 29, 2027
Commissioner Silvia Morales	4 year term September 1, 2027
Commissioner Richard Schmale	2 year term expires, May 12, 2025

2. Consideration of Late Additions and Changes to the Agenda

3. Consent Agenda

A. Minutes of the Regular Meeting held March 27, 2024

Motion to Approve

B. Recertification Program Assistance Services Contract

Motion to Delegate Authority to the Executive Director to Execute a Contract with Jamie Kinney Consulting.

C. Personnel Policies and Procedures Revision

Motion to Approve Revisions to Personnel Policies and Procedures

D. Salary Compensation Study

Receive Salary Compensation Study

E. Housing Authority Fiscal Year 2023/2024 Agency Goals – Quarter 3 Report

Receive Report

4. Oral Communications (All oral communications must be directed to an item not listed on this agenda and must be within the jurisdiction of the Board. Presentations must not exceed three minutes in length. The Board will not take action or respond immediately to any Oral Communication presented, but may choose to follow up at a later time or schedule item for a subsequent agenda. The Board may limit the total amount of time allowed for oral communication). Anyone addressing the Board of Commissioners is asked to complete a card and leave it with the Board secretary so that their names may be accurately recorded in the Minutes.

5. Unfinished Business

6. New Business
 - A. Agency Budget for FY 2024-2025
Approve Agency Budget for FY 2024-2025
7. Written Correspondence
8. Director's Report
9. Reports from Board Members
(Board members may report on meetings attended, if any, or other items of interest.)
10. Closed Session
11. Report on Closed Session
12. Adjournment

The Housing Authority complies with the Americans with Disabilities Act. If you are a person with disabilities and you require special assistance in order to participate, please contact the Board secretary at 831-454-9455, ext. 201 at least 72 hours in advance of the meeting in order to make arrangements. Persons with disabilities may request a copy of the agenda in an alternative format.

Spanish language translation is available on an as needed basis. Please make arrangements 72 hours in advance by contacting the Housing Authority at 831-454-9455, ext. 280.

Agendas can be obtained from the Housing Authority of the County of Santa Cruz Administration Department.

AGENDA ITEM NO. 1 Roll Call

Chairperson Schiffrin called the meeting to order at 11:00 a.m. Members present Chairperson Schiffrin, Vice Chairperson Martinez Alaniz, Commissioners Berg, Eligio, Melendrez, Morales and Schmale

Members Absent

None.

Staff Present

Jennifer Panetta, Tom Graham and Courtney Byrd of the Housing Authority

AGENDA ITEM NO. 2 Consideration of Late Additions or Changes to the Agenda

None.

AGENDA ITEM NO. 3 Consent Agenda

Chairperson Schiffrin asked for a motion to approve the Consent Agenda unless any Board of Commissioners or members of the public would like to pull an item from the agenda or have comments/questions on an item.

Commissioner Martinez Alaniz moved for the approval of the Consent Agenda; Commissioner Eligio seconded the motion and it as passed by the following vote:

AYES: Commissioners Berg, Eligio, Martinez Alaniz, Melendrez, Morales, Schiffrin and Schmale

NOES: None

ABSENT: None

ABSTAIN: None

Agenda Item 3A. Approved Minutes of the Regular Meeting held February 28, 2024

Agenda Item 3B. Approved the Agency-Wide Audited Financial Statements for Fiscal Year Ending June 30, 2023

AGENDA ITEM NO. 4 Oral Communications

None.

AGENDA ITEM NO. 5A Unfinished Business

None.

AGENDA ITEM NO. 6A Public Hearing, Review and Consideration of Draft 2024 Annual PHA

Plan, Administrative Plan, and MTW Supplement for the Housing Authority of the County of Santa Cruz

Secretary Panetta reminded the Board that in January, staff reviewed the draft Annual PHA Plan, Administrative Plan, and MTW Supplement to the PHA Plan with the Resident Advisory Board (RAB). The RAB supported the draft documents as presented. In February 2024, the Board of Commissioners reviewed and engaged in a discussion of the prepared drafts of the 2024 Annual PHA Plan, 2024 MTW Supplement to the Annual PHA Plan, and 2024 Housing Choice Voucher Program Administrative Plan.

Secretary Panetta informed the Board of some minor editorial revisions that have occurred since the February Board of Commissioners meeting, and which have been incorporated into the current draft of the MTW Supplement.

Secretary Panetta informed the Board of Commissioners that copies of the draft Agency Plan, HCV Administrative Plan, and MTW Supplement, have been made available to the public through the Housing Authority's website. Since Friday, February 2, 2024, notices inviting public review and comment on these plans have been continuously published every Friday, in both English and Spanish, in the Santa Cruz Sentinel, the Watsonville Pajaronian, and the Hollister Freelance.

Secretary Panetta informed the Board that staff have received no public comments on the posted documents. However, Secretary Panetta informed the Board that two letters were received with written comments. One from the County of Santa Cruz and one from Mercy Housing. Secretary Panetta informed the Board that both of these letters with written comments pertain to concerns about the scoring criteria for awarding Project Based Vouchers (PBV). The comments that were received from the County and Mercy Housing address documents that are not part of the Housing Authority's Annual Agency Plan, Administrative Plan or MTW Supplement. Secretary Panetta stated that these comments should be discussed as the PBV RFP scoring documents are updated. Secretary Panetta informed the Board that there is an item on this agenda regarding the PBV RFP document.

Chairperson Schiffrin opened the Public Hearing for the Draft Agency Plan, Draft Administrative Plan and associated materials at 11:06 a.m.

Public Hearing Comments:

No Public in attendance with comments.

Chairperson Schiffrin closed the Public Hearing for the Draft Agency Plan, Draft Administrative Plan and associated materials at 11:06 a.m.

Chairperson Schiffrin opened the Public Hearing for the Move to Work Supplement at 11:06 a.m.

Public Hearing Comments:

No Public in attendance with comments

Chairperson Schiffrin closed the Public Hearing for the Move to Work Supplement at 11:07 a.m.

End of Public Comments.

A Board discussion followed. Chairperson Schiffrin asked the Board of Commissioners if they had any further questions regarding the Housing Authority of the County of Santa Cruz plans before them. The Board of Commissioners had no further questions. The Board thanked staff for their work on the Annual PHA Plan.

Commissioner Melendrez moved to Adopt Resolution No. 2024-01: Authorizing Execution of PHA Certification of Compliance with PHA Plans and Related Regulations; Board Resolution to Accompany the Annual PHA Plan for the Housing Authority of the County of Santa Cruz and Resolution No. 2024-02: Authorizing Execution of MTW Certifications of Compliance with Regulations; Board Resolution to Accompany the MTW Supplement to the Annual PHA Plan for the Housing Authority of the County of Santa Cruz.; Commissioner Berg seconded the motion and it as passed by the following vote:

AYES: Commissioners Berg, Eligio, Martinez Alaniz, Melendrez, Morales, Schiffrin and Schmale
NOES: None
ABSENT: None
ABSTAIN: None

AGENDA ITEM NO. 6B Housing Authority Stakeholder Survey – Final Results

Deputy Executive Director Graham informed the Board of Commissioners that the Housing Authority’s Stakeholder Survey done by the research firm Zilo has been completed. The information from the study is intended to help to inform the development of additional programs and services in subsequent years. Deputy Director Graham informed the Board that the Housing Authority Stakeholder Survey included Housing Choice Voucher Participants (HCV), Residents of Housing Authority owned a managed properties and HCV landlords.

The 2024 Stakeholder Survey provided a wealth of information about the experiences and perspectives of families in the Housing Choice Voucher Program, residents of Housing Authority owned and managed properties, and participating landlords. Deputy Director Graham summarized the key themes and highlights of each group that was surveyed.

Deputy Director Graham informed the Boad that the overarching theme was general appreciation and

gratitude felt by the HCV participants, residents and landlords towards the housing assistance program and that there is a strong sense of community support for the staff members who facilitate the program. Director Graham informed the Board that staff will utilize the data in the reports and accompanying data to provide recommendations on New Horizons Programs and Services Year Three Plan as well as Housing Authority Agency Goals, both of which will be provided to the Board at the June 2024 regular meeting. A discussion followed.

Commissioners thanked staff for the presentation and commented on the positive feedback from those involved with the Housing Authority and thanked staff for their work on survey.

AGENDA ITEM NO. 6C Project-Based Voucher Request for Proposals

Secretary Panetta informed the Board that in alignment with the Annual PHA Plan goals, the Housing Authority has substantially expanded the Project Based Voucher (PBV) Program to support the development of affordable housing. Secretary Panetta informed the Board that the Housing Authority currently maintains an open Request for Proposals (RFP) to provide interested parties with the opportunity to request PBVs. Secretary Panetta informed the Board that since the release of the September 2023 RFP, the Housing Authority has received an exceptionally high volume of PBV requests, including new applications for both new construction and existing affordable projects, along with applications from projects that already have an award of PBVs that have requested additional vouchers. Secretary Panetta stated that in response to the demand for PBVs combined with voucher and funding limitations, staff recommends a temporary closure of the PBV RFP effective August 1, 2024. Staff further proposes to work with the Board of Commissioners to develop an updated RFP framework and scoring criteria that will allow the Housing Authority to continue to expand on the success of the PBV program within programmatic and funding constraints. A discussion followed.

Chairperson Schiffrin purposed a Subcommittee of three Board Commissioners to work with staff to update the PBV RFP. The Board of Commissioners agreed. Chairperson Schiffrin, Vice-Chairperson Martinez Alaniz and Commissioner Berg volunteered to be on the Subcommittee.

Commissioner Berg moved to Authorize Staff to Temporarily Close the PBV RFP effective August 1, 2024 and Establish a Subcommittee of three Board Commissioners to work with Staff on an Updated PBV RFP; Commissioner Martinez Alaniz seconded the motion and it as passed by the following vote:

- AYES: Commissioners Berg, Eligio, Martinez Alaniz, Melendrez, Morales, Schiffrin and Schmale
NOES: None
ABSENT: None

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ, MINUTES OF THE REGULAR MEETING MARCH 27, 2024 AT THE HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ, 2160 41ST AVENUE, CAPITOLA, CA 95010

ABSTAIN: None

AGENDA ITEM NO. 7 Written Correspondence
None.

AGENDA ITEM NO. 8 Report of Executive Director

Deputy Executive Director Graham updated the Board on the Natural Bridges Apartments. Tenant occupancy is scheduled for Fall 2024.

Deputy Executive Director Graham informed the Board that New Horizons released a Request for Qualification for roofing contractors to bid on replacing the existing roofs at 15 properties.

Deputy Executive Director Graham informed the Board that the Housing Authority is working with the Association of Energy Affordability on solar for multifamily affordable housing program to get solar on Housing Authority sites.

Executive Director Panetta stated that the 2024 Housing Authority Community Report is included in the Board packet. Staff is very proud of the report.

Executive Director Panetta informed the Board that the local regional chapter of NAHRO will be hosting the annual conference in San Jose this year, May 28 – 30th. Conference registration will open soon. Staff expects that this conference will include a Commissioners Fundamentals course that may be of interest to any Commissioners that have not yet taken this. Executive Director Panetta informed the Board that in-house training for the Brown Act over Zoom has been scheduled for April 25, 2024 at 11:00 a.m.

Executive Director Panetta gave the Board a legislative update. Executive Director Panetta informed the Board that HUD Secretary Ms. Marsha Fudge announced that she will be retiring. Ms. Adrienne Todman will be Acting Secretary.

AGENDA ITEM NO. 9 Reports from Board Members
None.

AGENDA ITEM NO. 10 Closed Session
None.

AGENDA ITEM NO. 11 Report on Closed Session
None.

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ, MINUTES OF THE REGULAR MEETING MARCH 27, 2024 AT THE HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ, 2160 41ST AVENUE, CAPITOLA, CA 95010

AGENDA ITEM NO. 12 Adjournment

The Board of Commissioners meeting was adjourned at 12:27 p.m.

I hereby certify that these minutes were approved by the Housing Authority of the County of Santa Cruz, on the Twenty Second Day of May, 2024.

Chairperson of the Authority

ATTEST: _____

Secretary

AGENDA ITEM SUMMARY

MEETING DATE: May 22, 2024

ITEM NUMBER: 3B

FROM: Executive Director

SUBJECT: Recertification Program Assistance Services Contract

RECOMMENDATION: Delegate Authority to the Executive Director to Execute a Contract with Jamie Kinney Consulting.

BACKGROUND SUMMARY:

In April 2024, the Housing Authority of the County of Santa Cruz issued a Request for Proposals (RFP) for Recertification Program Assistance for a qualified consultant to provide professional services to assist with processing program recertification transactions as part of the Housing Choice Voucher (HCV), Section 8 program, and other rental assistance programs administered by the Housing Authority.

The evaluation panel consisted of three members from the Housing Authority management team to review and score each proposal. Three consultants submitted proposals for review. Qualified consultants were required to have three years of experience providing consulting program services to housing authorities in the administration of HCV and other rental assistance programs.

Jamie Kinney Consulting (JKC), the selected proposal received the top score among the three responses. JKC has extensive experience providing consulting services to housing authorities, including HACSC, which includes practical knowledge of Yardi software, the client management system used by the Housing Authority. JKC has experience in processing and completing program recertification and interpreting and applying HUD regulations, Administrative Plans, and other procedural guidelines.

This contract is intended to provide on-demand scalable services in which the volume of services will fluctuate month-to-month based on the needs of the Housing Authority. The volume of transactions performed by JKC will vary depending on Agency workload and staff capacity, allowing the Agency to maintain timeliness of re-examinations and other routine transactions during periods of staff turnover, leaves of absence, or other Agency needs. The services are not intended to replace any staff positions, but rather to assist the Agency when there are gaps in staffing or capacity limitations. The Housing Authority is not obligated to assign a minimum number of recertifications per month.

The maximum compensation limit of the contract is \$600,000 with an initial term of three years

with the option to extend the term for up-to 2 additional one-year periods.

RECOMMENDATION: Delegate Authority to the Executive Director to Execute a Contract with Jamie Kinney Consulting.

AGENDA ITEM SUMMARY

MEETING DATE: May 22, 2024

ITEM NUMBER: 3C

FROM: Executive Director

SUBJECT: Personnel Policies and Procedures Revision

RECOMMENDATION: Approve Revisions to Personnel Policies and Procedures

BACKGROUND SUMMARY:

Housing Authority staff has worked in collaboration with our labor law attorney Robert Wilger at Littler, to draft an update to our Personnel Policies and Procedures, bringing our policies into alignment with recent changes to laws, regulations, and best practices.

Below is a summary of changes to the Personnel Policies. A redlined draft of the Policies and Procedures is attached for your review.

- Addition of Fragrance & Odor Policy on page 21, section V.
- Removed the Medical Examinations section under Employment Procedures, on page 22, Section C.
- Addition of Investigations of Current Employees on Page 22, Section D.
- Inclusion of Protected Activity and Protection Against Retaliation for Engaging in Protected Activities on Page 23, Section E.
- Updated Separation from Employment on Page 44, Section X.A.7 to allow payout of accrued and unused sick time upon separation.
- Revised Bereavement Leave on Page 45, Section X.B to allow up to five days paid leave per year and added clarification on covered family members as defined by law.
- Addition of Reproductive Loss Leave on Page 45, Section X.C as mandated by new California employment law.

RECOMMENDATION: Approve Revision to Personnel Policies and Procedures



HOUSING AUTHORITY

OF THE COUNTY OF SANTA CRUZ

2160 41st Ave, Capitola CA 95010

PERSONNEL POLICIES AND PROCEDURES

Revised ~~June 21, 2023~~ May, 2024

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PERSONNEL POLICIES AND PROCEDURES

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

I. STATEMENT OF AUTHORITY AND BASIC PRINCIPLES

The Board of Commissioners of the Housing Authority of the County of Santa Cruz (the "Authority"), in adopting these Personnel Policies and Procedures (also referred to as the "Personnel Policies") delegates the responsibility for its administration to the Executive Director, and charges the Executive Director to employ, assign and manage all personnel of the Authority on the basis of qualification and ability without regard to any legally protected characteristics.

These personnel policies and procedures are designed to afford each employee a clear summary of employment rights, benefits, conditions and responsibilities. It is further the desire of the Authority to provide the staff with working conditions conducive to individual satisfaction and achievement of the Authority's goals.

Copies of the Personnel Policies and Procedures of the Authority will be distributed to all employees and be available to them at each regular worksite. If an employee is unable to read and understand these Personnel Policies and Procedures in the English language and upon their request, the Authority will provide a translated version. Upon request, the Authority will also make a good faith effort to provide such assistance with regard to job descriptions, assignments, and disciplinary and/or grievance procedures.

None of our personnel documents and benefit plans, including these Personnel Policies, constitutes, or is intended to constitute, an express or implied contract guaranteeing continued employment for any employee.

Not all of the Authority's policies and procedures are set forth in these Personnel Policies. If an employee has any questions or concerns about these Personnel Policies or any other policy or procedure, please ask your supervisor or Human Resources.

Nothing in these Personnel Policies or in any other document or policy is intended to violate or supersede any local, state or federal law. Nothing in these Personnel Policies or in any other document or policy is intended to limit any concerted activities by employees relating to their wages, hours or working conditions, or any other conduct protected by Section 7 of the National Labor Relations Act (NLRA). Furthermore, nothing in these Personnel Policies prohibits an employee from reporting concerns to, filing a charge or complaint with, making lawful disclosures to, providing documents or other information to or participating in an investigation or hearing conducted by the Equal Employment Opportunity Commission ("EEOC"), National Labor Relations Board ("NLRB") or any other federal, state or local agency charged with the enforcement of any laws.

A. Applicability

Unless indicated otherwise, the Personnel Policies and Procedures shall apply to all Authority employees except the Executive Director.

B. Merit Principles

In order to assure a high quality of public service, personnel administration shall be guided by these merit employment principles:

1. Recruiting, selecting, and advancing employees on the basis of their relative ability, knowledge and skills;
2. Providing equitable compensation through a system of position classification;
3. Retaining employees on the basis of the adequacy of their performance, correcting inadequate performance, and separating employees whose inadequate performance is not corrected;
4. Assuring ethical treatment of applicants and employees in all aspects of personnel administration without regard to legally protected characteristics; and
5. Assuring that employees are protected against coercion for partisan political purposes and are prohibited from using their official authority for the purpose of interfering with or affecting the results of an election or a nomination for office.

C. Equal Employment Opportunity/Non-Discrimination

The Authority is an equal opportunity employer. In accordance with applicable law, we prohibit discrimination against any applicant or employee, individuals providing services in the workplace pursuant to a contract, unpaid interns and volunteers based on their actual or perceived: race (including traits historically associated with race, such as hair texture and protective hairstyles), religious creed, color, national origin, ancestry, physical or mental disability, medical condition, genetic information, marital status (including registered domestic partnership status), sex and gender (including pregnancy, childbirth, lactation and related medical conditions), gender identity and gender expression (including transgender individuals who are transitioning, have transitioned, or are perceived to be transitioning to the gender with which they identify), age (40 and over), sexual orientation, Civil Air Patrol status, military and veteran status and any other consideration protected by federal, state or local law (collectively referred to as "protected characteristics").

For purposes of this policy, discrimination on the basis of "national origin" also includes discrimination against an individual because that person holds or presents the California driver's license issued to those who cannot document their lawful presence in the United States, as well as discrimination based upon any of the following: an individual's or individual's ancestors' actual or perceived physical, cultural or linguistic characteristics associated with a national origin group; marriage to or association with individuals of a national origin group; tribal affiliation; membership in or association with an organization identified with or seeking to promote the interests of a national origin group; attendance or participation in schools, churches, temples, mosques or other religious institutions generally used by persons of a national origin group; or a name that is associated with a national origin group. An employee's or applicant for employment's immigration status will not be considered for any employment purpose except as necessary to comply with federal, state or local law.

The Authority allows employees to self-identify their gender, name and/or pronoun, including gender-neutral pronouns. The Authority will use an employee's gender or legal name as indicated on a government-issued identification document, only as necessary to meet an obligation mandated by law. Otherwise, the Authority will identify the employee in accordance with the employee's current gender identity and preferred name.

The Authority will not tolerate discrimination or harassment based upon these protected characteristics or any other characteristic protected by applicable federal, state or local law. The Authority also does not retaliate or otherwise discriminate against applicants or employees who request a reasonable accommodation for reasons related to disability or religion. Our commitment to equal opportunity employment applies to all persons involved in our operations and prohibits unlawful discrimination and harassment by any employee, including supervisors and co-workers.

D. Unlawful Harassment

The Authority is committed to providing a work environment free of harassment based on any legally protected characteristic. As a result, we maintain a strict policy prohibiting sexual harassment and harassment against employees, applicants for employment, individuals providing services in the workplace pursuant to a contract, unpaid interns or volunteers based on any legally-recognized basis, including, but not limited to, their actual or perceived race (including traits historically associated with race, such as hair texture and protective hairstyles), religious creed, color, national origin, ancestry, physical or mental disability, medical condition, genetic information, marital status (including registered domestic partnership status), sex and gender (including pregnancy, childbirth, lactation and related medical conditions), gender identity and gender expression (including transgender individuals who are transitioning, have transitioned, or are perceived to be transitioning to the gender with which they identify), age (40 or over), sexual orientation, Civil Air Patrol status, military and veteran status, immigration status or any other consideration protected by federal, state or local law.

For purposes of this policy, discrimination on the basis of "national origin" also includes harassment against an individual because that person holds or presents the California driver's license issued to those who cannot document their lawful presence in the United States and based on any of the following: an individual's or individual's ancestors' actual or perceived physical, cultural or linguistic characteristics associated with a national origin group; marriage to or association with individuals of a national origin group; tribal affiliation; membership in or association with an organization identified with or seeking to promote the interests of a national origin group; attendance or participation in schools, churches, temples, mosques or other religious institutions generally used by persons of a national origin group; or a name that is associated with a national origin group. All such harassment is prohibited.

This policy applies to all persons involved in our operations, including coworkers, supervisors, managers, temporary or seasonal workers, agents, clients, vendors, customers, or any other third party interacting with the Authority ("third parties") and prohibits proscribed harassing conduct by any employee or third party of the Authority, including nonsupervisory employees, supervisors and managers. If such harassment occurs on the Authority's premises or is directed toward an employee or a third party interacting with the Authority, the procedures in this policy should be followed.

1. Sexual Harassment Defined

Sexual Harassment includes unwanted sexual advances, requests for sexual favors or visual, verbal or physical conduct of a sexual nature when:

- Submission to such conduct is made a term or condition of employment; or
- Submission to or rejection of such conduct is used as a basis for employment decisions affecting the individual; or
- Such conduct has the purpose or effect of unreasonably interfering with an employee's work performance or creating an intimidating, hostile or offensive working environment.

Sexual harassment includes various forms of offensive behavior based on sex and includes gender-based harassment of a person of the same sex as the harasser. The following is a partial list:

- Unwanted sexual advances.
- Offering employment benefits in exchange for sexual favors.
- Making or threatening reprisals after a negative response to sexual advances.

- Visual conduct: leering, making sexual gestures, displaying of sexually suggestive objects or pictures, cartoons, posters, websites, emails or text messages.
- Verbal conduct: making or using derogatory comments, epithets, slurs, sexually explicit jokes, comments about an employee's body or dress.
- Verbal sexual advances or propositions.
- Verbal abuse of a sexual nature, graphic verbal commentary about an individual's body, sexually degrading words to describe an individual, suggestive or obscene letters, notes or invitations.
- Physical conduct: touching, assault, impeding or blocking movements.
- Retaliation for making harassment reports or threatening to report harassment.

This policy also protects employees from harassment by vendors or clients. If harassment occurs on the job by someone not employed by the Authority, the procedures in this policy should be followed.

This prohibitions and protections of this policy apply to all people, regardless of gender, sexual orientation or gender expression.

2. Other Types of Harassment

Prohibited harassment on the basis of the legally protected characteristics set forth above and includes behavior similar to sexual harassment such as:

- Verbal conduct including threats, epithets, derogatory comments or slurs.
- Visual conduct including derogatory posters, photography, cartoons, drawings, websites, emails, text messages or gestures.
- Physical conduct including assault, unwanted touching or blocking normal movement.
- Retaliation for making harassment reports or threatening to report harassment.

3. Abusive Conduct Prevention

It is expected that the Authority and persons in the workplace perform their jobs productively as assigned, and in a manner that meets all of management's expectations, during working times, and that they refrain from any malicious, patently offensive or abusive conduct including but not limited to conduct that a reasonable person would find offensive based on any of the protected characteristics described above. Examples of abusive conduct include repeated infliction of verbal abuse, such as the use of malicious, derogatory remarks, insults, and epithets, verbal or physical conduct that a reasonable person would find threatening, intimidating, or humiliating, or the intentional sabotage or undermining of a person's work performance.

4. Complaint Procedure

Any employee who believes that he or she has been harassed or discriminated against by a coworker, supervisor, agent, client, vendor or customer of the Authority, or any other third party interacting with the Authority or any individual who is aware of the harassment, discrimination, retaliation or abusive conduct directed toward others, should immediately provide a written or verbal report to their supervisor, any other

member of management, or the Human Resources Director at 2160 41st Ave, Capitola CA 95010 to report such incidents. The Authority will endeavor to protect the privacy and confidentiality of all parties involved to the extent possible, consistent with a thorough investigation.

Supervisors and managers who receive complaints of misconduct must immediately report such complaints to the Human Resources Director who will attempt to resolve issues internally.

After a report has been received, a fair, timely, thorough and objective investigation by management will be undertaken that provides all parties appropriate due process and reaches reasonable conclusions based on the evidence collected. The investigation will be completed and a determination made and communicated to you as soon as practical. The Authority expects that all employees fully cooperate with any investigation conducted by the Authority.

If we determine that this policy has been violated, remedial action will be taken, commensurate with the severity of the offense. Appropriate action will also be taken to deter any future harassment or discrimination. If a complaint of harassment or discrimination is substantiated, appropriate disciplinary action, up to and including discharge, will be taken.

5. Protection Against Retaliation

Retaliation is prohibited against any person by another employee or by the Authority for using this complaint procedure, reporting harassment, or for filing, testifying, assisting or participating in any manner in any investigation, proceeding or hearing conducted by a governmental enforcement agency. Prohibited retaliation includes, but is not limited to, termination, demotion, suspension, failure to hire or consider for hire, failure to give equal consideration in making employment decisions, failure to make employment recommendations impartially, adversely affecting working conditions or otherwise denying any employment benefit.

Report any retaliation to your department head, the Executive Director or Human Resources Director. Any report of retaliatory conduct will be investigated in a thorough and objective manner. If a report of retaliation is substantiated, appropriate disciplinary action, up to and including discharge, will be taken.

6. Liability for Unlawful Harassment

Any person who is found to have engaged in unlawful harassment is subject to disciplinary action up to and including discharge from employment. A person who engages in harassment may be held personally liable for monetary damages.

The Authority does not consider conduct in violation of this policy to be within the course and scope of employment or the direct consequence of the discharge of one's duties. Accordingly, to the extent permitted by law, the Authority reserves the right not to provide a defense or pay damages assessed against an employee for conduct in violation of this policy.

7. Additional Enforcement Information

In addition to the Authority's internal complaint procedure, employees should also be aware that the California Department of Fair Employment and Housing (DFEH) and the federal Equal Employment Opportunity Commission (EEOC) investigate and prosecute complaints of harassment, discrimination and retaliation in employment. Employees who believe that they have suffered unlawful discrimination, harassment, or retaliation may file a complaint with either of these agencies. The EEOC and DFEH serve as neutral fact finders and attempt to help the parties to resolve disputes voluntarily. For more information, contact the Human Resources Director or the nearest office of the DFEH or EEOC, as listed on the internet or in the telephone directory.

E. Disability Accommodation

To comply with applicable laws ensuring equal employment opportunities to individuals with disabilities, the Authority will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship and/or a direct threat to the health and/or safety of the individual or others would result. Any applicant or employee who requires an accommodation in order to perform the essential functions of their job, enjoy an equal employment opportunity, and/or obtain equal job benefits should contact Human Resources and request such an accommodation. The individual with the disability should specify in writing what barriers or limitations make it difficult for them to perform the job. The Authority will engage in the interactive process to determine the nature of the issue and what if any reasonable accommodations may be appropriate. The Authority will conduct an investigation regarding these barriers or limitations and will then identify possible accommodations, if any, that will help to eliminate the barrier(s) or limitation(s).

In some cases, this interactive process may be triggered without a request from the employee, such as when the Authority receives notice from its own observation or another source that a medical impairment may be impacting the employee's ability to perform their essential job functions.

Employees who believe they need an accommodation must specify, preferably in writing, what barriers or limitations prompted the request. The Authority will evaluate information obtained from the employee, and possibly their health care provider or another appropriate health care provider, regarding any reported or apparent barriers or limitations, and will then work with the employee to identify possible accommodations, if any, that will help to eliminate or otherwise address the barrier(s) or limitation(s).

If the accommodation is reasonable and will not impose an undue hardship on the Authority and/or a direct threat to the health and/or safety of the individual or others, the Authority will make the accommodation. The Authority may also propose alternative accommodation. The individual is required to fully cooperate with the Authority in seeking and evaluating alternatives and accommodations. The Authority may require medical verification of both the disability and the need for accommodation. The Authority will also consider requests for reasonable accommodations for medical conditions related to pregnancy and childbirth where supported by medical documentation.

Employees who wish to request an unpaid leave of absence or who wish to extend a current leave of absence because of a qualifying disability should speak to the Human Resources Department regarding proposed accommodations.

The Authority will not retaliate or otherwise discriminate against an employee or applicant who requests an accommodation in accordance with this policy.

F. Religious Accommodation

The Authority will provide reasonable accommodation for employees' religious beliefs, observances, and practices when a need for such accommodation is identified and reasonable accommodation is possible. A reasonable accommodation is one that eliminates the conflict between an employee's religious beliefs, observances, or practices and the employee's job requirements, without causing undue hardship to the Authority.

The Authority has developed an accommodation process to assist employees, management, and Human Resources. Through this process, the Authority establishes a system of open communication between employees and the Authority to discuss conflicts between religion and work and to take action to provide reasonable accommodation for employees' needs. The intent of this process is to ensure a consistent approach when addressing religious accommodation requests. Any employee who perceives a conflict

between job requirements and religious belief, observance, or practice should bring the conflict and their request for accommodation to the attention of Human Resources to initiate the accommodation process. The Authority requests that accommodation requests be made in writing, and in the case of schedule adjustments, as far in advance as possible.

The Authority will not retaliate or otherwise discriminate against an employee or applicant who requests an accommodation in accordance with this policy.

G. Accommodation for Adult Literacy Programs

The Authority provides reasonable accommodation and assistance to an employee who reveals a literacy problem and requests assistance to enroll in an adult literacy education program unless doing so will result in an undue hardship to the Authority's business operations. Examples of assistance include providing employees with the location of local literacy programs and arranging for jobsite visits by literacy education providers.

Employees who wish to self-identify as an individual with a literacy problem and request an accommodation should contact Human Resources. The Authority will take reasonable steps to safeguard the privacy of any employee who self-identifies. In addition, employees who are performing satisfactorily will not be subject to termination of employment because they have disclosed literacy problems.

While the Authority encourages employees to improve their literacy skills, the Authority will not reimburse employees for the costs incurred in attending a literacy program. Time off to attend literacy programs may be provided as a reasonable accommodation unless doing so will result in an undue hardship. However, if time off is provided, the time off may be unpaid. If time off is unpaid, employees wishing to take such leave may utilize their existing vacation time or other accrued paid time off.

H. Accommodation for Victims of Domestic Violence, Sexual Assault or Stalking

The Authority will make reasonable accommodations for any employee who reports that he or she is the victim of domestic violence, sexual assault or stalking and requests that the Authority accommodate their safety while at work, unless providing the accommodation will impose an undue hardship on the Authority's business operations or violates the Authority's duty to provide a safe and healthy working environment for all employees.

Reasonable accommodations may include, but are not limited to: a transfer; reassignment; modified work schedule; change in work telephone number; change in work station; installed lock; assistance in documenting domestic violence, sexual assault or stalking that occurs at the workplace; safety procedures; or other adjustment to a job structure, workplace facility or work requirement in response to a domestic violence, sexual assault or stalking or referral to a victim assistance organization.

Employees may also be entitled to a leave of absence under the Authority's Domestic Violence, Sexual Assault or Stalking Victim Leave policy and should consult that policy and/or Human Resources for additional information.

The Authority may request that an employee provide a written statement signed by the employee (or an individual acting on behalf of the employee) certifying that the requested accommodation is for the employee's safety while at work. The Authority may also require an employee to provide a certification, such as police report, court order or documentation from a medical professional, that the employee is the victim of domestic violence, sexual assault or stalking and may request recertification every six months.

Employees must notify the Authority if their needs change or if they no longer need an accommodation.

The Authority will keep all information submitted in connection with an employee's request for an accommodation confidential to the extent permissible by law. If the law requires disclosure of information, the Authority will notify the employee before any information is released.

The Authority will not discriminate, harass or retaliate against any employee because the individual is, or is perceived to be, a victim of domestic violence, sexual assault or stalking or requests a reasonable accommodation in accordance with this policy.

Employees who have questions about this policy or who wish to request a reasonable accommodation under this policy should contact Human Resources.

I. Accommodation for Drug or Alcohol Treatment or Rehabilitation

The Authority will attempt to reasonably accommodate employees with chemical dependencies (drugs or alcohol), if they voluntarily wish to seek treatment and/or rehabilitation, unless the accommodation imposes an undue hardship on the Authority's business operations. The Authority's support for treatment and rehabilitation does not obligate the Authority to hire or employ any person who violates the Authority's drug and alcohol abuse policy or who, because of current use of drugs or alcohol, is unable to perform their duties or cannot perform the duties in a manner that would not endanger their health or safety or the health or safety of others.

The Authority will keep all information submitted in connection with an employee's enrollment in a drug or alcohol rehabilitation program confidential to the extent permissible by law. Time off for these purposes is unpaid. However, employees wishing to take such leave may utilize their sick leave or accrued paid time off, if applicable.

Employees who have questions about this policy or who wish to request a reasonable accommodation under this policy should contact Human Resources.

J. Use of Employer Owned and Supplied Equipment

Employees have no right to privacy when using Agency-provided equipment or supplies. Employees should be aware that the following guidelines limit their privacy in the workplace.

1. Management's Right to Access Information

The electronic mail system and internet access has been installed by the Authority to facilitate business communications and work-related research. Although each employee has an individual password to access this system, it belongs to the Authority and the contents of e-mail communications are accessible at all times by Authority management for any business purpose. These systems may be subject to periodic unannounced inspections, and should be treated like other shared filing systems. All system passwords and encryption keys must be made available to management upon request. An employee may not use passwords that are unavailable to their supervisor or install encryption programs without turning over encryption keys to their supervisor.

All e-mail messages are Authority records. The contents of any e-mail may be disclosed by management within the Authority without employee permission. The employee should not assume that messages are confidential. Back-up copies of e-mail may be maintained and referenced for business and legal reasons.

2. Business Use

Internet services are primarily for business use in the course of employees' assigned duties. Incidental and occasional personal use of internet services is permitted during working time, though the Authority

reserves the right to monitor and limit all internet access. Personal use should take place outside working time where possible. All materials, information and software created, transmitted, downloaded or stored on the Authority's computer system are the property of the Authority and may be accessed only by authorized personnel.

3. Personal Use of Email

Because the Authority provides the electronic mail system to assist employees in the performance of the job, it is to be used primarily for official Authority business. The Authority reserves the right to access and disclose as necessary for any business reason all messages sent over its email system, without regard to content. Additionally, employees should be aware that all email messages may be subject to public records requests.

Since employees' personal messages can be accessed by Authority management without prior notice, they should not use e-mail to transmit any messages the employee would not want read by a third party. For example, staff should understand if they use the Authority's e-mail for gossip, or personal information about self or others, these messages are not private and could be disclosed or forwarded under circumstances likely to embarrass the sender. The Authority does conduct periodic audits of internal and external email use. If the Authority discovers a violation of this policy, the employee will be subject to disciplinary action up to and including dismissal.

4. Viruses

To protect the Authority system, under no circumstances is staff to download attachments and files from persons or sites unknown to them. If unrecognized attachments and files appear in staff e-mail, check with Administration before downloading or clicking on the attachment. Do not enter unfamiliar web sites through the Authority internet access without authorization from Administration. Employees are prohibited from accessing third party email systems (Gmail, Yahoo mail, Hotmail, etc.) on Authority computers.

5. Prohibited Content of E-Mail and Internet Communications

Employees may not use the Authority's e-mail system or the internet access in any way that may be seen as ~~unlawfully~~ harassing, discriminatory, obscene, violent or threatening in violation of the Authority's policies. Examples of prohibited use include sexually-explicit messages, cartoons, images or jokes; unwelcome propositions or love letters; ethnic or racial slurs; or any other messages, images or jokes that can be construed to be harassment of or discrimination against of others based on their sex, race, ancestry, sexual orientation, age, national origin, citizenship, disability, religious or political beliefs or any category protected by federal, state or local law. Any use of the Internet, e-mail or any other electronic resource to harass or discriminate is ~~unlawful and~~ strictly prohibited by the Authority. Accessing any site that is sexually or racially offensive or discriminatory; displaying, downloading, or distributing any sexually explicit material; or transmitting any of the Authority's confidential or proprietary information or materials is forbidden. Employees may not use the Authority email system or internet access to enter, or participate in, any "chat rooms" or establish personal relationships except as approved by the Authority for business use such as Microsoft Teams. Employees may not utilize the agency e-mail for personal use.

6. Password and Encryption Key Security and Integrity

Employees are prohibited from the unauthorized use of the passwords and encryption keys of other employees to gain access to the other employee's email messages.

7. Copyright restrictions, permission required

Any software or other material downloaded into the Authority's computers may be used only in ways consistent with the licenses and copyrights of the vendors, authors or owners of the material. Prior written authorization from Administration is required before introducing any software into the Authority's computer system. Employees may not download entertainment software or games. If such software is detected on an employee's computer, it will be deleted and discipline may be imposed.

8. Authority Representation

Only authorized employees may communicate on the Internet on behalf of the Authority. Employees may not express opinions or personal views that could be misconstrued as being those of the Authority. Employees may not state their affiliation with the Authority on the Internet unless required as part of their assigned duties. Internet access is limited to staff on an as needed basis. Internet traffic is audited regularly.

Violations of this policy: Any violation of this policy will result in disciplinary action, up to and including dismissal.

9. Use of Cell Phones

Employees whose job responsibilities include regular or occasional driving and who are issued an Authority cellular telephone or use their personal cellular telephone for business-related work are expected to put safety first. Therefore, personal and Authority-supplied cellular telephones are not to be used while driving. If you receive a call on a cellular telephone while driving, you must pull over safely, park, and then either answer the telephone or return the call of the person who attempted to contact you. Further, if you need to make an Authority related cellular telephone call, you must also pull over safely, park and then call the person you need to reach. Under no circumstances may you use the cell phone while driving. Moreover, you may not send or review text messages while driving. This policy is in effect for your safety and the safety of others, as well as the safety of the Authority's property.

Employees should also be aware that driving while holding and operating a handheld wireless telephone or electronic wireless communications device is a violation of California law unless the device is specifically designed and configured to allow hands-free operation and is used in that manner while driving. Under California law, such handheld devices can only be operated while driving in a manner requiring use of the driver's hand if: the device is mounted on the vehicle's windshield or affixed to the dashboard or center console in a manner that does not hinder the driver's view of the road; and the driver uses their hand to activate or deactivate a feature of the device with a single swipe or tap of the driver's finger.

Employees who are charged with traffic violations, or cause accidents or injuries, resulting from their use of personal or Authority-issued cellular telephones while driving will be solely responsible for all liabilities, fines, etc., that result, to the extent permissible under the law.

Employees whose job responsibilities do not specifically include driving as an essential function, but who are issued an Authority-provided cellular telephone for business use or who use their personal cellular telephone for business use, are also expected to abide by the provisions of this.

Employees who use a personal cell phone should be aware that any work-related text messages or other communications either sent or received are subject to the Authority's records retention policy. Employees who are required to use their personal electronic devices for work purposes will be reimbursed for this use in accordance with the law. If you believe you are entitled to reimbursement or additional reimbursement, please contact Human Resources to further discuss the issue.

K. Social Media

Social media refers to blogs, chat rooms, forums and social networking sites such as Facebook, Twitter, LinkedIn, Pinterest, Instagram, Snapchat, Tumblr, and YouTube, among others. You have the right to engage in personal social media activities to express your thoughts or promote your ideas, as long as your activities are not performed on working time or by using our Communications System, and do not cause harm to others or conflict with our policies, business, goodwill or reputation.

If you engage in social media activities on your own time, you must comply with the following guidelines as a condition of employment with us:

- Do not disclose our confidential and proprietary information or trade secrets.
- Do not write or post harassing or offensive material in violation of law or our Agency policies.
- Do not unlawfully defame the Agency or our personnel, activities or competitors.
- Do not use or reproduce our logo, website link or other proprietary [Authority Agency](#) information.
- When expressing your opinion or position, you must use your own name and Internet account, not the [Authority's Agency](#) name or Internet account. Your comments or posts must be yours alone, and must not appear to be representative of or approved by [the Authorityour Agency](#).

Remember that you are responsible for your comments or posts on social media sites. You can be sued by the [AuthorityAgency](#), its personnel or by any third party if you post defamatory, proprietary, [sexual](#) harassing, libelous, or pornographic comments.

If you want to use social media to promote [the Authority's our Agency's](#) activities, products or initiatives, you must obtain advance approval of the Executive Director.

You are not required to disclose your personal social media passwords or to grant management access to your private social media postings or the postings of any third parties. Your postings may be subject to disclosure by law or in the context of a workplace investigation. You should be aware that any content posted or published on the Internet is, by its very nature, subject to disclosure in any number of ways (including by third parties who have received or viewed your posts), and you do not have secure privacy rights with regard to your social media activity.

Nothing in this policy is intended to interfere with employees' rights protected by Section 7 of the National Labor Relations Act or other federal or state law to engage in concerted protected activity or to discuss the terms of their employment or working conditions with or on behalf of co-workers, or to bring such issues to the attention of management at any time. We will enforce this policy only to the extent necessary to protect our trade secrets, enforce our policies and protect [the Authority's Agency](#) personnel and clients.

L. Political Activities

All members, officers, and employees of the Authority shall be subject to the provisions of the federal Hatch Act (Title 5, United States Code, Section 1501 et. Seq.). No employee shall be a candidate for public office in a partisan election; use their official authority or influence for the purpose of interfering with or affecting the results of an election or a nomination for office; or directly or indirectly coerce contributions from subordinates in support of a political party or candidate. As private citizens, however, employees have the rights authorized under the Hatch Act, including the right to run for public office in a nonpartisan election and the right to contribute money to political organizations and attend political fundraising functions.

All members, officers and employees of the Authority are also subject to the provisions of California Government Code Section 54964, which prohibits the use of Authority funds or resources to support or oppose the approval or rejection of a ballot measure or the election or defeat of a candidate by the voters.

All members, officers and employees of the Authority are also subject to the provisions of California Government Code Sections 3204 et seq., which, among other things, prohibit the use of official positions to influence elections, solicitation of political contributions from other Authority employees, and the offer of additional employee compensation in exchange for political contributions.

M. Ethics

The successful operation and reputation of the Authority is built upon the principles of integrity and ethical conduct of our employees. Our reputation for integrity and excellence requires careful observance to the spirit and letter of all applicable laws and regulations, as well as scrupulous regard for the highest standards of conduct and personal integrity.

We will comply with all applicable laws and regulations and expect all directors, officers, and employees to conduct business in accordance with the letter, spirit, and intent of all relevant laws and to refrain from any illegal, dishonest, or unethical conduct.

In general, the use of good judgment, based on high ethical principles, will guide you with respect to lines of acceptable conduct. If a situation arises where it is difficult to determine the proper course of action, the matter should be discussed only with your department head, the Executive Director or Human Resources Director.

Compliance with this policy of business ethics and conduct is the responsibility of every employee. Disregarding or failing to comply with this standard of business ethics and conduct may lead to disciplinary action, up to and including termination of employment. Retaliation against any employee who raises any questions, concerns or complaints concerning the honesty and integrity of our operations is strictly prohibited. Similarly, retaliation is prohibited against any employee who provides accurate information to any law enforcement agency about the commission of any federal or state offense. Any employee who feels that he or she has been retaliated against or threatened with retaliation for these reasons should report the matter immediately to the Executive Director or Human Resources Director as a signed complaint or on an anonymous, confidential basis.

N. No Solicitation/Distribution of Literature

The Authority has established the following rules applicable to all employees and non-employees that govern solicitation, distribution of written material and access to Authority property:

- Employees may engage in solicitation activities only during non-working times. No employee may engage in solicitation during their working time or during the working time of the employee or the employees at whom such activity is directed;
- Employees may distribute or circulate any written or printed material only in non-work areas, during nonworking times. No employee may distribute or circulate any [non-work related](#) written or printed material in work areas at any time, or during their working time or during the working time of the employee or employees at whom such activity is directed;
- Non-employees are not permitted to solicit or to distribute written material for any purpose on Authority property; and
- Off-duty employees are not permitted in work areas.

Strict compliance with these rules is required.

As used in this policy, "working time" includes all time for which an employee is paid and/or is scheduled to be performing services for the Authority; it does not include break periods, meal periods, or periods in which an employee is not performing and is not scheduled to be performing services or work for the Authority.

O. Conflict of Interest

Authority employees shall abide by the laws and regulations of the State of California, including the Political Reform Act and Government Code Section 1090, concerning activities that may create a conflict of interest and those federal conflict of interest provisions that become applicable as a result of federally funded projects.

It is the policy of the Authority that an Authority employee shall not engage in any employment, activity, or enterprise for compensation which creates an actual or potential or a perceived conflict with, or is inimical to their duties, functions or responsibilities of the Authority. Such employee shall not be involved in making, or participate in making, Authority decisions that may result in (1) a material impact on their personal financial position; or (2) preferential treatment to their friends or relatives.

An employee's outside employment activity (including but not limited to volunteer activity) and/or enterprise is prohibited if it (1) involves the use for private gain or advantage of Authority time, facilities, information, equipment and/or supplies, or the prestige or influence of their Authority office or employment; (2) involves receipt or acceptance of any money or other consideration from anyone other than the Authority for the performance of an act which is required or expected to be rendered in the regular duties or hours of employment as an Authority employee; (3) involves the performance of an act in other than their capacity as an Authority employee, which act may later be subject directly or indirectly to the control, inspection, review, audit, or enforcement of any other officer or employee of the Authority; or, (4) conflicts with your work schedule or involves time or other demands that impair or have a detrimental effect on your work performance with the Authority; (5) conflicts with your duties and responsibilities or creates an actual conflict of interest or (6) requires you to conduct work or related activities on Authority property, during Authority working time or using Authority facilities and/or equipment. For purposes of this policy, self-employment is considered outside employment.

An employee may not be the owner of or have a financial interest in property under the Section 8 program.

For purposes of prevention actual, potential or perceived conflicts of interest, an employee is prohibited from having a personal or financial interest or benefiting from any project or contract funded during that person's employment and up to one year thereafter. Without the concurrence of the Authority, an employee is prohibited from accepting a contract for personal services from any entity doing business with the Agency during that person's employment and up to one year thereafter.

If an employee finds that he or she has, or is considering the assumption of, a financial interest or outside relationship or employment which might involve a conflict of interest, or if the employee is in doubt as to the proper application of this policy, he or she should promptly make all the facts known to the Executive Director or Human Resources Director and refrain from any exercise of responsibility in any manner which might reasonably be considered to be affected by any adverse interest.

P. Relatives in the Workplace

To the extent possible, no person who is related within the first or second degree to a department head may be appointed in a paid capacity within that department. No person who is related within the first or second degree to a manager or supervisor may be appointed or assigned to a position that is in a direct

reporting relationship or within the supervisory line of authority to such manager or supervisor. Relatives within the first or second degree are spouses, life partners, parents, children, grandchildren, brothers and sisters. In order to avoid the appearance of favoritism or impropriety, department heads are discouraged from appointing relatives within the first or second degree to volunteer assignments within that department. Any such employment shall require prior approval by the Executive Director as necessary to the conduct of the programs of the Authority and shall be reported to the Board of Commissioners.

Employees who are in a dating or intimate relationship may not remain in a reporting relationship or in a position where one party to the relationship has authority or review authority over the other. The employees are required to inform Human Resources so that the Authority can determine whether to transfer or terminate one or both employees. The employees may be given the opportunity to make the decision as to who will leave the Authority.

Q. Payments

No salary, wages, expenses, or allowances shall be paid except upon the certification of the Executive Director and in accordance with the policies of the Board of Commissioners.

R. Gifts

An Authority employee shall not ask for, receive, or agree to receive any gift, gratuity or reward for the performance of their duties. All offers of gifts, even if not accepted, shall be reported in writing to the Executive Director. At the discretion of the Executive Director, incidental gifts of informational material or involving food or beverage, such as a calendar or a holiday box of candy, may be accepted if they are shared by all employees.

S. Confidentiality

Authority employees shall abide by the laws and regulations of the State and Federal governments concerning confidentiality of client information. Employees shall sign and adhere to a Confidentiality of Client Information statement provided by the Authority. Unauthorized release of or discussion about client information within or outside the Authority, except when permitted by applicable laws, is considered grounds for discipline up to and including dismissal.

T. Program Participant

Authority employees may participate in programs provided by the Authority (except as cited in Section H), if otherwise eligible and no conflict of interest exists as determined by the Executive Director. The conduct of employees as program participants serves as an example to other participants and to the public; an employee's failure to strictly abide by program rules reflects badly on the Authority and harms the public services it provides. Therefore, an employee-participant shall adhere to all applicable program terms and agreements, including the timely payment of rent, and shall at all times be a participant in good standing. Violation of this policy may result in disciplinary action, up to and including dismissal.

U. Personal Appearance

The image we project to our clients is reflected in the appearance of our employees. Simply stated, employees should look well-groomed and should be dressed appropriately for their specific job duties. Employees are expected to use good judgment in their appearance and grooming, keeping in mind the nature of the work, their own safety and the safety of coworkers, and their need to interact with the public. We encourage employees to seek the advice of their department head if they have questions regarding appropriate dress or appearance at work. Employees who report to work improperly dressed or groomed

may be instructed by their department head to return home to change. Non-exempt employees will not be paid for the time they spend going home to change.

Nothing in this policy is intended to prevent employees from wearing a hair or facial hair style that is consistent with their religious, cultural, ethnic or racial heritage or identity. This policy will be interpreted to comply with applicable local, state or federal law.

1. Religious, Medical and Disability Accommodations

The Authority will reasonably accommodate exceptions to this policy if required due to an employee's religious beliefs, medical condition or disability. Employees who need such an accommodation should contact their supervisor or Human Resources.

V. Fragrance & Odor Policy

The Housing Authority strives to provide a safe and healthy work environment. Fragrances and odors may trigger allergic reactions or create health problems for some individuals. To ensure the comfort and safety of our employees, clients and visitors, the Housing Authority desires to minimize any difficulties experienced in the workplace by employees, clients and visitors who may experience health problems from fragrances/odors or who may have chemical or fragrance sensitivities.

Fragrance refers to a scent that is perceptible by others. Fragranced products are any product that contains fragrance or scent. This policy is meant to cover noticeable fragrance from any source, including foods, personal items, perfumes, and grooming. All employees must observe good habits of grooming and personal hygiene. Body odor, from any cause, should not create distractions.

Feedback from and to employees will help ensure compliance with this policy. Any person who feels that a fragrance or odor is harmful, or offensive is expected to promptly notify his/her supervisor or Human Resources. If a problem arises due to a disability, consistent with the Housing Authority's legal obligations, the Housing Authority will attempt to reasonably accommodate the individual unless it causes an undue hardship. The Housing Authority may take steps, including, but not limited to, requesting or requiring that an employee not wear or use certain products while at work. Scents should not be detectable at more than an arm's length from the individual.

II. EMPLOYMENT PROCEDURES

A. Application

1. Authority to appoint, promote, transfer, demote and terminate personnel shall be vested in the Executive Director and in such other officials as formally designated by the Executive Director. The Executive Director shall have the final authority on all personnel decisions.
2. Whenever possible, vacated and/or newly established positions shall be filled consistent with the highest quality operations by the promotion of qualified employees.
3. Notice of all available job openings shall be distributed by email to all employees prior to or concurrently with scheduled advertising to the public.
4. Open public recruitment shall be done through appropriate media, for a reasonable time, to assure sufficient opportunity for the appropriate segment of the labor market to apply and be considered for employment on the basis of abilities and potential. Except for continuous recruitment, public announcement of all position vacancies shall be made at least seven (7) calendar days in advance of the closing date for receipt of applications.

5. All applicants for employment are required to submit an application in a format specified by the Executive Director.

B. Qualifications

The Executive Director shall prepare or cause to be prepared a job description for each employment classification, including examples of duties, experience, education, and such other qualifications as desirable. The Executive Director may establish an examination procedure to qualify applicants for employment by one or more of the following means: application review, written examination, verbal interview, performance test including computer skills, business and personal references.

C. Medical Examinations

~~Employees in specific positions may be required, for job related reasons, to take a physical examination after a conditional job offer is made or as a condition of continued employment at the discretion of the Executive Director. Such examination shall be at the Authority's expense and administered by a physician selected by the Authority in accordance with applicable law.~~

D.C. Investigations

The Authority recognizes the importance of maintaining a safe, secure workplace with employees who are qualified, reliable, and nonviolent, and who do not present a risk of serious harm to their coworkers or others. To promote these concerns and interests, the Authority reserves the right to investigate an individual's prior employment history, personal references, and educational background, as well as other relevant information. Consistent with legal or contractual requirements, the Authority also reserves the right to obtain and to review an applicant's or an employee's criminal conviction record, and related information, and to use such information when making employment decisions, but only to the extent permissible under applicable law.

A pending criminal matter may be considered in appropriate circumstances for business-related reasons, consistent with applicable law. All background checks will be conducted in strict conformity with the federal Fair Credit Reporting Act (FCRA), applicable state fair credit reporting laws, and state and federal anti-discrimination and privacy laws. The Authority is an equal opportunity employer and will comply with applicable federal, state and local laws relating to the use of background checks for employment purposes.

D. Investigations of Current Employees

The Authority may occasionally find it necessary to conduct investigations regarding alleged employee misconduct, which may include alleged violations of the Authority's policies and/or applicable laws. Employees subject to an investigation or requested to participate in an investigation are required to cooperate with the Authority's lawful efforts to obtain relevant information.

An employee who is interviewed during the course of an investigation is prohibited from attempting to influence any potential witness while the investigation is ongoing. An employee may discuss his or her interview with a designated representative. The Authority will not disclose a completed investigation report except as it deems necessary to support a disciplinary action, to take remedial action, to defend itself in adversarial proceedings, or to comply with the law or court order. The Authority requests that all information discussed during an investigation be kept confidential while the investigation is ongoing and not be shared with other employees. Employees who disclose confidential information during an active investigation to influence another witness may be subject to disciplinary actions up to and including termination.

E. Protected Activity and Protection Against Retaliation for Engaging in Protected Activities.

This Policy governs and protects all Authority officials, officers, employees, or applicants for employment.

Protected activity includes, but is not limited to, any of the following:

1. Filing a complaint with a local, state or federal enforcement or administrative agency when the employee has reasonable cause to believe the reported conduct violates or is in noncompliance with local, state or federal law, rule or regulation.
2. Participating in or cooperating in good faith with a local, federal or state enforcement agency that is conducting an investigation of alleged unlawful activity.
3. Testifying in good faith and with reasonable cause as a party, witness, or accused regarding alleged unlawful activity.
4. Associating with another individual who is engaged in any of the protected activities enumerated here.
5. Making or filing in good faith and with reasonable cause an internal complaint with the Authority regarding alleged unlawful activity or violation of the Authority's policies, or of unsafe working conditions.
6. Providing informal notice to the Authority regarding alleged unlawful activity or violation of the Authority's policies, or of unsafe working conditions.
7. Calling a governmental agency's "Whistleblower hotline" in good faith.
8. Filing a written complaint under penalty of perjury that the Authority has engaged in gross mismanagement, a significant waste of public funds, or a substantial and specific danger to public health or safety.
9. Refusing to participate in any activity that the employee reasonably believes would result in a violation of or noncompliance with local state or federal law, rule or regulation.

The Authority prohibits all of the following:

1. Taking any retaliatory adverse employment action against an employee because the employee has or is believed to have engaged in protected activity.
2. Preventing an employee from engaging in protected activity.
3. Retaliating against an employee for refusing to participate in any activity that would result in a violation of or noncompliance with a local, state or federal law, rule or regulation, or a violation or or noncompliance with the Authority's policies; and
4. Retaliating against an employee because the employee's family member has, or is perceived to have engaged in any of the protected activities.

Prohibited retaliatory adverse action may include, but is not limited to, any of the following:

1. Real or implied threats of intimidation to attempt or prevent an individual from reporting alleged wrongdoing or because of actual or potential protected activity.
2. Refusing to hire an individual because of actual or potential protected activity.
3. Denying a promotion to an individual because of actual or potential protected activity.
4. Taking any form of disciplinary action because of actual or potential protected activity.

5. Extending a probationary period because of actual or potential protected activity.
6. Altering work schedules or work assignments because of actual or potential protected activity.
7. Condoning hostility and criticism of co-workers and third parties because of actual or protected activity.
8. Spreading rumors about a person because of that person's actual or perceived protected activity.
9. Shunning or unreasonably avoiding a person because of that person's actual or perceived protected activity.

An applicant or employee who feels he or she has been retaliated against in violation of this Policy or have witnessed conduct in violation of this Policy should immediately report the conduct according to the complaint procedure in the Authority's Policy Against Discrimination, Harassment or Retaliation so that the complaint can be resolved fairly and quickly. Supervisors and Managers have the same responsibilities as defined in the Policy Against Discrimination, Harassment or Retaliation.

E. F. Appointment

The Executive Director shall clearly specify the conditions of employment; including position title, salary, vacation leave, sick leave, benefits, and the category of positions.

F. G. Employee Eligibility and Work Authorization

The Authority is committed to employing only United States citizens and non-citizens who are authorized to work in the United States and who comply with applicable immigration and employment law. As a condition of employment, every individual must provide satisfactory evidence of their identity and legal authority to work in the United States within three business days of commencing employment. If the employee cannot verify their right to work in the United States within three business days of employment, the Authority will be required to terminate their employment immediately.

III. CATEGORIES OF EMPLOYEES

There are five (5) categories of employee positions. The policies and procedures herein apply to all categories unless otherwise expressly stated.

A. Temporary

A temporary employee is one who is appointed for a special or temporary purpose on an hourly, per diem, or monthly basis which is expected to last less than 1,000 hours of paid service. Such employee shall not accumulate credit for sick leave (except HWHFA leave as mandated by California law), holidays, or vacations; shall not receive health insurance, life insurance, short-term or long-term disability, accidental death or dismemberment insurance, retirement plans or other benefits provided by the Authority, except as required for temporary employees by Federal, State, or local law.

The services of temporary employees may be terminated by the Authority without cause and such termination shall not entitle the employee to an appeal of the termination or other due process hearing.

B. Long-Term Temporary

A long-term temporary employee is one who is appointed for a special or temporary purpose which is expected to last 1040 service hours and less than 2080 service hours; or a temporary employee who has completed 1,000 paid service hours of continuous employment with the Authority.

Commencing with the first day of employment in a long-term temporary position, the employee shall be entitled to begin accumulating credit for sick leave, holidays and vacation, become eligible for health insurance coverage, and participate in the retirement plan. Earned vacation time shall not be granted before a six-month period of employment is completed. Long-term temporary employees shall not receive life insurance, long- or short-term disability, accidental death and dismemberment insurance, or other benefits provided by the Authority.

The services of long-term temporary employees may be terminated by the Authority without cause and such termination shall not entitle the employee to an appeal of the termination or other due process hearing.

C. Seasonal

A seasonal employee is one who is appointed on a seasonal basis. Such employee shall accumulate credit for sick leave, holidays and vacation. Upon termination of seasonal employment, the employee shall be entitled to all vacation pay earned and accumulated (per Section IX.D). Such seasonal employees shall receive health insurance coverage; however, they shall not receive life insurance, long- or short-term disability, accidental death or dismemberment insurance, retirement plans or other benefits provided by the Authority. When 1,000 service hours are reached in a fiscal year, the seasonal employee shall be eligible for participation in the retirement plan.

The services of seasonal employees may be terminated by the Authority without cause and such termination shall not entitle the employee to an appeal of the termination or other due process hearing.

D. Probationary

A probationary employee is one who is appointed to a regular position who shall serve a probationary period equivalent to twelve (12) months full-time employment from the date of such appointment (i.e., 2,080 hours of active paid service, excluding paid sick, holiday, or vacation time or similar paid non-service hours). The probationary period shall be utilized for closely observing the work of new employees and for securing their effective adjustment to their positions. All probationary employees shall be evaluated as to performance approximately ~~three (3) months (520 hours)~~, six (6) months (1,040 hours), and twelve months (2,080 hours) after appointment. However, failure of the supervisor to timely complete such evaluations shall not negate the employee's probationary status.

Probationary employees shall accumulate credit for sick leave, holidays and vacation and shall receive health insurance coverage and retirement. Probationary employees shall not receive life insurance, short-term or long-term disability and accidental death or dismemberment insurance, or other benefits provided by the Authority.

The services of probationary employees may be terminated by the Authority without cause and such termination shall not entitle the employee to an appeal of the termination or other due process hearing.

Upon successful completion of the probationary period in a position, an employee shall become a regular employee in that position.

The probationary period may be extended in writing prior to the completion of the required initial probationary period, at the discretion of the Executive Director, for a period of three (3) months (520 hours) of active paid service beyond the required initial probationary period.

E. Regular

A regular employee is one who has successfully completed the probationary period for a regular position. Such employees shall accumulate credit for sick leave, holidays, and vacation and shall receive health insurance, life insurance, short-term and long-term disability, accidental death and dismemberment insurance and retirement plans, as adopted by the Authority.

F. Part-time

An employee may be appointed to a part-time position in any of the above categories at the discretion of the Executive Director. Accumulation of sick leave, vacation leave and holidays will be pro-rated according to the approved number of hours in a work week. An employee serving in a part-time status who receives health insurance shall share the costs of the premiums pro-rata where the employee will contribute an additional portion in relation to hours worked.

G. Special Circumstances

If required in order to accomplish specialized duties, or secure and retain candidates and staff the Executive Director may negotiate particular terms of employment. ~~for specific duties. Such special circumstances shall require approval by the Board of Commissioners.~~

IV. PERSONNEL FILES AND EMPLOYEE EVALUATIONS

A. Personnel Files and Records

Such records shall be kept by the Executive Director as necessary for transactions and reference and for making reports showing administrative actions, including name and address of each employee, employment history of each employee (which shall reflect positions held), employment status, classification, and rate of pay and benefits.

The information recorded in your personnel file is extremely important. It is each employee's responsibility to make sure that the personal data in the file is accurate and up to date. Report any change of address, phone number, etc. to the Authority immediately.

Any personnel action affecting the position or status of any employee shall be recorded on a personnel form adopted for the Authority's use and a copy shall be given to the employee for their personal records.

The official personnel file of each employee shall be maintained at the principal office of the Authority. Copies of all material placed in an employee's official personnel file shall be given to such employee five (5) days prior to placement in the file, except for material obtained as part of the recruitment and selection process. The employee may submit a written response during such five (5) day period, which response shall be attached to said material and filed in the employee's official personnel file.

Access to the employee's official personnel file is restricted. Only the Executive Director and persons authorized by the Executive Director will have access to your personnel file. However, the Authority will cooperate with, and provide access to your personnel file, to law enforcement officials or local, state or federal agencies in accordance with applicable law.

Health/medical records are not included in your personnel file. These records are confidential and maintained in a file separate from your personnel file. The Authority will safeguard them from disclosure and will divulge such information only: 1) as allowed or required by law; 2) to the employee's personal physician upon written request or permission of the employee; or 3) as required for workers' compensation cases.

Employees may inspect their personnel file in the presence of an authorized representative of the Authority. You may also obtain copies of your file. The Authority will copy the documents that you have signed but copies of other documents may be at your expense. Contact the Human Resources Director to submit your written request and to schedule a convenient time. The Authority will comply with inspection or copy requests within 30 days of the receipt of the request. If you desire, you may add a written statement to your file explaining any disputed item. With the exception of routine and clerical access, a log shall be maintained to record such access indicating the date and the person obtaining access.

Employees may also inspect their payroll records upon request, and may obtain a copy of these records at their own expense. The Authority will comply with all inspection requests within 21 calendar days, unless it is impossible to do so.

B. Employees' Social Security Number Protection

We have established the following procedures to protect the privacy and security of employees' social security numbers (SSNs) provided to us. This policy applies to SSNs received for any employment-related purpose, including, but not limited to, the evaluation of job applicants; payroll, benefits, and human resources administration; and employment-related investigations.

1. Access to, and Use of, Information or Documents That Contain SSNs

Only authorized employees may access information and documents containing SSNs. Employees authorized to access such information or documents generally will be limited to Department Directors, the Human Resources Department, certain Finance Department staff, and the Executive Director. Authorized employees may access information or documents containing SSNs only on a need-to-know basis and may use such information and documents only for the purpose for which access is permitted.

2. Disclosures of Information or Documents That Contain SSNs

When information or documents containing SSNs needs to be disclosed within the Authority to any person who is not authorized to access SSNs, the SSN should be redacted before the disclosure is made. We will disclose documents containing SSNs outside the Authority only as permitted or required by law or court order, or required for business purposes such as benefit enrollment. Except when a SSN is disclosed in accordance with a contract that requires the recipient to provide adequate safeguards, SSNs may not be disclosed to a third-party without the prior approval of the Executive Director or the Human Resources Director. All requests for the disclosure of information or documents containing SSNs (other than requests made by a party to a contract providing adequate safeguards) must be forwarded promptly to the Executive Director or to the Director of Human Resources. Information or documents containing SSNs transmitted to a third party in electronic format should be encrypted before transmission whenever possible.

3. Proper Disposal of Documents That Contain SSNs

Paper documents containing SSNs will be shredded before being discarded. SSNs stored on an electronic medium, such as hard drives, laptops, and compact disks, will be rendered irretrievable before being discarded or re-issued to an employee who is not authorized to access SSNs.

4. Penalties for Violation of this Policy

Any employee who becomes aware of, or suspects, a violation of this policy should inform the Executive Director or the Director of Human Resources immediately, so that we may conduct an investigation where

appropriate. Violation of this policy will result in disciplinary action up to and including termination of employment.

C. Employee Evaluation

The primary purpose of written employee evaluations shall be to inform employees about how well they are performing their work and how they can improve their work and performance.

Each employee's ~~Supervisor with review and approval from the~~ Department Head, ~~after consultation with the employee's immediate supervisor~~, shall be responsible for evaluating the employee's performance. No evaluation of any employee shall be placed in any personnel file without an opportunity for discussion between the employee and the evaluator.

When possible, no less than a "meets expectation" ~~overall~~ evaluation shall occur without prior counseling or notation to the employee concerning areas that need improvement. Any less than satisfactory overall evaluation shall have documentation or explanation and shall include specific recommendations for improvement and provisions for assisting the employee in implementing any recommendations made. The employee shall have the right to review and respond in writing within 5 business days to any evaluation.

D. Schedule for Employee Evaluation

Employees may be evaluated at any time, and shall generally be evaluated at least at those intervals indicated below. However, the Authority does not contract or guarantee to provide an evaluation at any specific interval and reserves the right to engage in performance improvement plans before or after an evaluation.

1. Probationary Employees shall usually have their performances evaluated prior to the end of 1,040 hours (6 months). The final probationary evaluation shall be performed by the direct Supervisor and reviewed by Department Head prior to the end of the established probationary period, whether that be 2080 hours (one year) or longer as defined in Section III.D. For probationary employees "service hours" means hours actually worked in the position, excluding overtime hours, and does not include hours on paid or unpaid leave, jury duty or other non-work activities.

2. Regular employees shall usually be evaluated according to the following schedules. Upon promotion or promotional reclassification, an employee shall serve a new probationary period in that classification and shall be evaluated within 1,040 hours (6 months) of the promotion or reclassification, and annually thereafter.

Merit salary increases shall be given to employees coincident with each accrual of 2,080 service hours of their appointment, promotion, or promotional reclassification as a regular employee, whichever is the most recent action, until the top of their salary range is reached, as provided in Section VI. An evaluation of less than "meets expectation" may result in a merit increase being denied.

3. All other employees shall be evaluated on a schedule established by the Executive Director, but no less frequently than once every twelve (12) calendar months whenever feasible unless individual circumstances warrant otherwise.

4. Additional performance evaluations for any employee may be undertaken by the Supervisor, Department Head or Executive Director for sound and justifiable reasons at any time deemed necessary to assist the employee in the effective performance of required duties.

Employees who are not maintaining adequate performance standards shall be notified and placed on special evaluation. Such evaluations may not exceed one (1) per month nor continue longer than six (6) months.

Employees who are unsuccessful in attaining an overall performance rating of “meets expectation” or better during this continuous six-month special performance rating period shall be subject to performance improvement notice up to and including dismissal, subject to the appeal rights defined in Section XIV.G

E. Disposition of Copies of Performance Evaluations

Only two (2) official copies of an employee evaluation shall be made. Whenever an employee is evaluated, the Department Head shall discuss the evaluation with the employee and both parties shall sign it at that time. The employee shall retain one (1) copy, and the second copy shall be included in the employee's official personnel file.

F. Reviews. An employee who has reason to question any aspect of their performance rating may request a review of the rating with the person making the evaluation. Should either the evaluator or the employee request, the Executive Director shall review the rating(s) in question for the purpose of considering a change in any rating(s) on a performance evaluation. The determination of the Executive Director shall be final and not subject to appeal. The employee may alternatively or additionally attach a written response to their evaluation disputing any rating contained therein.

V. HOURS OF WORK AND OVERTIME

A. Hours of Work

1. Work Week

For purposes of calculating overtime, the work week is defined as the seven (7) work day period between 12:00 a.m., Sunday, through 11:59 p.m., the following Saturday.

For full-time employee work schedules, the normal work week shall be forty (40) hours and consist of five (5) consecutive working days. The normal weekly work schedules shall be Monday through Friday.

2. Work Day

For purposes of calculating overtime, the work day is defined as the twenty-four (24) hour period between 12:00 a.m., through 11:59 p.m.

For full-time employee work schedules, the normal work day shall be eight (8) hours. Normal full-time daily working schedules shall be from 8:00 am to 5:00 pm, with one unpaid hour for lunch.

Other alternate work schedules (AWS) may be assigned to meet the needs of the Authority. Alternate work schedules may vary in the number of hours per day and in the start and end of the work week, but shall be no more than 80 hours per pay period. The employee shall be given reasonable advance notice of any change in their work schedule unless said change has been deemed an emergency by the Authority or its Executive Director.

3. Lunch Periods

During a shift of eight (8) hours, employees shall be entitled to one uninterrupted unpaid lunch period of no more than one (1) hour or less than one-half (1/2) hour. The time for such lunch periods shall be scheduled for full-time employees and start before the completion of the 5th hour of work in a work day.

4. Rest Periods

Each employee shall be entitled to rest periods which, shall be at the rate of fifteen (15) minutes during each work period of four (4) hours or more. Rest periods are part of the regular workday and shall be compensated at the regular rate of pay for the employee. Rest periods shall not be accumulated or taken at the beginning or end of a work period, or combined with the lunch period. The Executive Director may assign such staggered rest periods as may be needed to serve the public.

B. Overtime

1. Definition

Overtime is any authorized time worked in excess of forty (40) hours per work week for non-exempt employees. Designated exempt employees paid on a salary basis are exempt from overtime.

2. Authorization

Overtime shall be worked only when requested by a Department Head. Employees cannot work overtime without the advance approval of the Executive Director or their designee. Working overtime without prior authorization may result in disciplinary action.

3. Computation

- a. Time Worked. Paid time off from work for any purpose other than holidays, as described in 3.b., shall not count as time worked for purposes of overtime. Such paid time off not counting toward overtime, includes, but is not limited to: sick leave; vacation; jury duty; any balance of compensatory time; and mandatory leave with pay.
- b. Holidays.
 - i. When a holiday falls on an employee's regular work day, the hours of holiday leave shall be counted as time worked for purposes of computing overtime whether the holiday is worked or not, and hours worked on a holiday shall be counted as additional time worked for purposes of computing overtime.
 - ii. Holidays which occur on a day other than the employee's regularly scheduled work day shall not be counted as time worked for purposes of computing overtime. (For example, if Monday is not an employee's regular work day and Monday is a holiday, the employee would get paid for the holiday, but the hours would not be considered "time worked" for purposes of computing overtime.)

4. Rate

Eligible employees shall receive payment for overtime worked in the amount of one and one-half (1½) times their regular rate of pay, except as provided immediately below.

Upon request of an employee and approval of the Executive Director or the Executive Director's designee, non-exempt employees may receive compensatory time off for overtime worked in lieu of overtime pay. Compensatory time off shall be provided at the rate of one and one-half (1½) hours of compensatory time off for each hour of overtime worked in lieu of overtime compensation in cash. However, overtime shall be compensated in cash whenever and to the extent that overtime would result in a compensatory time off balance in excess of 40.5 hours (40.5 hours of compensatory time represents 27 hours of overtime work).

5. Compensatory Time Implementation

If an employee makes a request in writing to the Executive Director or the Executive Director's designee to use compensatory time from the employee's balance, and gives reasonable advance notice so that coverage can be arranged and said time off request does not unduly disrupt the operation of the Authority, the Executive Director shall grant the request.

The Authority will not require employees to take compensatory time off for the purpose of avoiding overtime pay.

C. Timekeeping

1. Nonexempt Employees

Employees who are classified as nonexempt must accurately record the time they work each day, including arrival, departure and meal break times.

When employees receive their paychecks, they should verify immediately that their working time was recorded accurately and that they were paid correctly for all hours worked.

Nonexempt employees must report all time worked and must not work any time that is not authorized by their supervisors. This means nonexempt employees must not start work early, finish work late, work during a meal break or perform any other extra or overtime work unless directed to do so. Employees who have questions about when or how many hours they are expected to work should contact their supervisor.

It is a violation of the Authority's policy for anyone to instruct or encourage another employee to work "off the clock," to incorrectly report hours worked or to alter another employee's time records. If any employee is directed or encouraged to incorrectly report hours worked or to alter another employee's time records, he or she should report the incident immediately to a supervisor.

2. Exempt Employees

Employees who are classified as exempt must record absences from work for reasons such as leaves of absence, sick leave or vacation.

Exempt employees are paid on a salary basis. This means the employee regularly receives a predetermined amount of compensation each pay period, which cannot be reduced because of variations in the quality or quantity of the employee's work. In general, an exempt employee will receive their salary for any week in which the employee performs any work, regardless of the number of days or hours worked.

However, an exempt employee will not be paid for full days not worked in the following circumstances:

- When an exempt employee takes one or more full days off for personal reasons other than sickness or disability, the employee will not be paid for such day(s) of absence, but the employee may use available vacation to make up for the reduction in salary;
- When an exempt employee takes one or more full days off from work due to sickness or disability, the employee will not be paid for such day(s) of absence, but the employee may use available sick time to make up for the reduction in salary;
- When an exempt employee works only part of the week during their first and last week with the Authority, the employee will be paid only for the days actually worked; and
- When an exempt employee takes unpaid leave under the Family and Medical Leave Act or corresponding laws, the Authority will not pay for such days/hours of absence.

The Authority may require an exempt employee to use available vacation as a replacement for salary, when the employee takes less than a full-day off from work.

An exempt employee's salary will not be reduced when the employee works part of a week and misses part of a week due to service as a juror, as a witness or in the military or for lack of work.

It is Authority policy to comply with the salary basis requirements of the Fair Labor Standards Act (FLSA) and applicable state law. The Authority prohibits any deductions from pay that violate the FLSA or applicable state law.

If an exempt employee believes that an improper deduction has been made to their salary, the employee should immediately report this information to Human Resources, a supervisor. Reports of improper deductions will be promptly investigated. If it is determined that an improper deduction has occurred, the employee will be promptly reimbursed for any improper deduction made.

D. Call-Back Duty

Certain employees are required to work on call. Whether they will receive pay for being on call depends on the facts of each situation.

Defined. Employees who are ordered to return to their work site or another specified work site by the Executive Director or the Department Head following the termination of their normal work shift on a given work day shall be considered to be on call-back.

Non-exempt employees will be paid for the time spent responding to phone calls or performing work at home.

Travel time to and from the work site may be considered working time if the employee is on call.

Compensation. Employees who are called back shall be compensated for the actual time worked at their regular rate of pay. If call backs result in the employee working more than 40 hours in the workweek then call back time will be paid at one and one-half (1 1/2) times their regular hourly rate, provided that a minimum of two (2) hours of compensation shall be paid for all periods of work less than two (2) hours

E. Job Sharing

With the approval of the Executive Director, upon request, two (2) or more employees may share one (1) or more full-time positions; provided however that each such part-time job shall be at least a half-time position, and such job sharing shall not result in an increase in salary or benefit costs to the Authority. All

such arrangements shall be made in the best interests of the Authority, shall be at the sole discretion of the Executive Director, and may be terminated by the Executive Director.

Each employee electing to share a full-time position pursuant to this Section may receive Authority contributions for health and welfare benefits on a pro-rated basis.

F. Alternate Work Schedules

Employee may request alternate schedules. Written requests shall be submitted to the Executive Director and shall state reasons for the schedule. The requests shall be considered and may be granted so long as work flow is not interrupted and public needs are met, as determined by the Executive Director. The Executive Director or their designee shall respond to requests in writing within fourteen (14) calendar days. A request that is not approved by the Executive Director in that time shall be deemed denied. All such arrangements shall be made and continue as long as mutually agreed to by the employee(s) and the Executive Director. Approval for creation and continuation of alternate work schedules lies wholly within the discretion of the Executive Director.

G. Lactation Accommodation

In recognition of the well documented health advantages of breastfeeding for infants and mothers and in compliance with applicable law, employees have the right to request a lactation accommodation and the Authority provides a supportive environment to enable breastfeeding mothers to express their breast milk during the work day.

The process used to request an accommodation is the following: The employee should submit a request to their department manager and/or Human Resources.

The Authority will respond to the request. The Authority will provide a reasonable amount of break time to accommodate an employee desiring to express breast milk for the employee's infant child, each time the employee has to express milk.

The Authority will provide employees with the use of a room or private room near the employee's work location, other than a bathroom or toilet stall, for the employee to express milk. This location may be the employee's private office, if applicable. This room will be shielded from view and free from intrusion while the employee is lactating. Additionally, the room will be safe, clean, free of hazardous materials, be in close proximity to the employee's workplace and provide the following:

- A surface to place a breast pump and personal items;
- A place to sit;
- The room will provide access to electricity or alternative devices, including but not limited to, extension cords or charging stations needed to operate an electric or battery-powered breast pump;
- Access to a sink with running water;
- Access to a refrigerator suitable for storing milk (or another cooling device).

Where the room provided is used for lactation as well as other uses, the use of the room for lactation shall take precedence over the other uses, but only for the time it is being used for lactation purposes.

The Authority will comply with all applicable legal requirements when implementing this policy. If an employee has any concerns regarding the accommodations provided, the employee may contact

management or Human Resources to further discuss any issues. The Authority will review the matter and will work to make requested accommodations in accordance with the law. Employees also have the right to file a complaint with the Labor Commissioner if they believe that the Authority has violated the law regarding this policy.

VI. PAY, CLASSIFICATION, ASSIGNMENT, AND EMPLOYEE STATUS

A. Pay Periods

Employees are paid by check or direct deposit on a bi-weekly basis on every other Friday. If the pay day falls on a holiday, whenever possible employees will be paid on the immediately preceding regularly scheduled workday. The standard pay period commences at 12:00 a.m., on the Sunday immediately preceding pay day. Employees who select certain Alternate Work Schedules (AWS) will have a different pay period as described in the AWS procedure. Deadlines for submission of time sheets shall be determined by the Finance Department consistent with efficient operations. Employees who fail to submit completed and accurate time sheets by the determined deadline shall be subject to disciplinary action up to and including dismissal.

We work hard to ensure that all employees are paid correctly, but mistakes can happen. When mistakes do occur and are called to our attention, we will promptly investigate the matter and make any corrections necessary as soon as possible in accordance with applicable law. Review each paycheck and pay stub when you receive it to make sure your pay is correct. If you believe an error has occurred or if you have any questions about your paycheck or pay stub, promptly report the matter to the Human Resources Director.

B. Classification

Classification is defined as a group of positions sufficiently similar as to duties performed, degree of supervision exercised or received, minimum requirements and such other qualifications that the same title, same test of fitness and the same schedule of compensation may be applied to each position in the group.

1. Positions with similar responsibilities and duty requirements shall be grouped into the same class, with a designated salary range as approved by the Authority. Common standards of selection, assignment and salary are applied to the positions within the same class.
2. Job descriptions for each position shall be developed and approved by the Authority. An Authority manual of job descriptions shall be available to employees and the public at the Authority office.
3. Job assignments to specific positions in a class shall be made at the discretion of the Authority. Employees may be given any job assignments and tasks that are deemed by the Authority to be appropriate to their position, and employees have no expectation that they are entitled to a particular assignment.
4. Duties of employees shall include those outlined in the job classification and those which reasonably relate to the job description or classification, as determined by the Executive Director or the Department Head.
5. New classifications shall be created, abolished, or combined by the Authority as the needs of the Authority change.

6. As part of the employee's annual performance evaluation, and/or at the request of an employee, the Department Head shall review the employee's assignment to ensure that the employee's assigned duties are consistent with their classification.
7. The Authority endeavors to conduct a full compensation and classification study at least every five (5) years. Results of the study shall be available to all employees and presented to the Board of Commissioners. The studies shall be advisory to the Executive Director and the Commissioners. Any employee may present written and/or verbal comments concerning the study to the Executive Director or their designee; the comments shall be related to the employee's position. All job descriptions shall be updated to reflect actual duties assigned and authorized.

C. Compensation

1. Salary Schedule

The Salary Schedules for employees and the Salary Step/Range Chart shall be available for review through the Human Resources Department or on the Authority intranet. There shall be five (5) steps in a salary range with increments of approximately 5% between each step. Employees may be paid at the Authority's discretion within each range's steps. The Board of Commissioners shall have complete discretion in approving the salary schedule, and the Board's decision shall be final.

2. Salary Increases and Bonuses

Salary increases for all employees are based on performance and length of service. There are three types of increases and bonuses, as follows.

- a. **Step Increases.** All new regular employees are eligible for the second salary step after completing 2,080 hours of service, with the Authority, in active paid status and successful completion of the probationary period. Each successive step thereafter, until step five (5) is reached, shall be considered and may be granted after completing increments of paid service, with the Authority, of 2,080 hours, and with a satisfactory or better performance evaluation.
- b. **Longevity Service Incentive Bonus.** An employee employed by the Authority prior to July 1, 1997, shall receive a longevity service increase of approximately 5% on the date of the tenth anniversary (20,800 hours of paid service) of full-time continuous service as a regular employee of the Authority. All staff, shall receive a \$1,000 longevity incentive bonus every 5 years of employment with the Authority, on their applicable anniversary date.
- c. **Cost of Living Adjustment.** It is the policy of the Authority to consider cost of living adjustments annually. Public agencies consisting primarily of the municipal and county governments, and such other similar public bodies including similar -Public Housing Authorities, shall be contacted in making cost of living and compensation surveys to determine if a cost of living adjustment shall be made.

3. Hours of Service for Purposes of Salary Increases

- a. **Defined.** Paid hours of work and paid leave hours accrued by an employee within the number of authorized hours for the position occupied by the employee shall constitute hours of service for purposes of salary increases. Hours worked in excess of the number of regularly scheduled hours for the position, whether overtime or otherwise, shall not be included in hours of service. Exempt employees hours of service are calculated based on the number of scheduled work hours.

- b. Beginning Date. Hours of service for purposes of step advancement accrue by position, beginning from the most recent date of appointment to that position.

4. Anniversary Date Defined

The initial anniversary date of an employee is that date upon which an employee begins paid service in their initial probationary position.

D. Probationary Conditions

No Authority employee shall attain regular status in any position without first having successfully completed the required probationary period. Authority employees shall serve in probationary status under the following conditions.

1. New hires and rehires to regular positions shall serve an initial probationary period equivalent to 2,080 service hours (approx. 12 months) from the date of appointment by the Executive Director. "Service hours" means hours actually worked in the position, excluding overtime hours, and does not include hours on paid or unpaid leave such as sick or vacation time, jury duty or other non-work activities.
2. Employees reassigned to a different position through promotion, demotion, reclassification or transfer shall serve in probationary status equivalent to 2,080 service hours of employment in the new position.
3. Performance evaluations shall be conducted during the probationary period as provided in Section IV.C.1.

E. Promotion

Vacated or newly established positions shall be filled to the fullest extent, consistent with the highest quality operations, by the promotion of qualified employees. Promotion of individuals shall be based on consideration of the following factors: qualification, the quality of service previously rendered (including but not limited to quality of work, compliance with work rules), seniority, and the recommendation of the Department Head.

All current staff shall be notified of such position openings in the manner mentioned above in Section II.A. Any employee may apply for a promotion to any advertised position. Any promotion may require that the qualifications of the employee being considered be determined by criteria appropriate to the position, as determined by the Executive Director. Interviews shall be conducted as determined appropriate by the Executive Director.

1. Regular Employees. Upon promotion to a position of higher classification, a regular employee shall serve in a probationary status. During the probationary period, if the employee is released or seeks reinstatement to the previous position for reasons other than misconduct, the employee shall be entitled to reinstatement in the formerly held classification, if available; or in the alternative a lower class, if available, for which the employee qualifies and chooses to accept.
2. Probationary Employees. Upon reassignment to a position of higher classification (promotion), a probationary employee shall begin to serve a new probationary period. If a probationary employee is released from the new position, reinstatement to a lateral or lower classification may be

considered; however, the decision to so reinstate is a matter in the sole discretion of the Executive Director.

3. When an employee is promoted to a position of higher classification/higher range on the salary chart, such employee shall be placed on a step so as to receive at least a 5% salary increase.
4. Promotions of individuals to vacant positions on a temporary acting basis may be made at the discretion of the Executive Director during the period of recruitment for said position, as indicated in Section VI.G.1 Employees will be compensated at the appropriate range/step on the salary chart for the temporary position so as to receive at least a 5% temporary salary increase.

F. Demotion

The demotion of an employee shall be limited to the following four conditions: when the Authority deems it necessary (1) in order to provide the best possible services for the Authority's program; (2) to assist the employee to make appropriate adjustments in the responsibility level or performance of their duties; (3) due to re-organizational priorities brought about by a change in the nature of services provided, lack of work or lack of funds; or (4) in situations when an employees has not improved performance to the level of satisfactory after completion of a performance improvement plan. Any such action taken with regard to a regular employee is subject to appeal by the affected employee, as set forth in Sections XIII or XIV.

1. Downward adjustments of any position or class of positions shall be considered demotions and shall take place only as a result of the conditions set forth herein. Such action may be considered non-disciplinary or disciplinary, provided, however, that disciplinary demotions of regular employees shall be for cause only and shall comply with the disciplinary procedures set forth in Section XIV. A disciplinary demotion shall be supported by a less than satisfactory performance evaluation or other documentary evidence of cause for discipline. In both instances the Authority shall retain its right to "Y-Rate" classified employees into existing or proposed positions providing it does not displace another more senior regular classified employee.
2. Non-disciplinary demotions caused by re-organizational priorities, as determined by the Executive Director, may result in the reassignment of an employee to a class having a lower salary range. The Authority shall retain the right to "Y-Rate". In addition, the affected employee shall be given preferential consideration for openings in their former classification.
3. A reassignment to a regular position at a lower salary range due to non-disciplinary administrative demotion or voluntary demotion shall entitle the employee to a salary step in the lower range which corresponds in dollar amount to that which was held in the higher range, provided that in no case shall the new pay level exceed the maximum salary for the lower classification.
4. "Y-Rating" adjustments are defined as follows: When an employee is reassigned to a lower classification having maximum rates which are less than the dollar amounts at the previous classification, the employee's salary shall remain at the previous level (Y-Rate) until such time as future salary increases bring the salary range of the employee's new class up to a point where the Y-Rate falls within such range. At that point, the employee is no longer Y-rated, and assumes the salary step in the new class.

G. Working Out of Classification

"Working out of classification" shall mean an assignment of duties authorized in writing by the Executive Director on a temporary basis, where all or a significant portion of the duties performed are at a higher

classification than the classification of the employee assigned the new duties. All "out of classification" assignments are temporary and shall not be made to fill regular position vacancies except during that period required to complete the recruitment/selection process, or for vacation and leave relief.

1. An employee, other than a management employee, shall perform such duties at their current rate of pay for a period of not more than ten (10) consecutive working days (80 hours) during sick leave and vacation relief. An employee performing such duties for more than 10 consecutive working days shall have their salary adjusted upward for the period the assignment is in effect, beginning with the eleventh (11th) consecutive working day (81 hours) of such work. Exception: if the employee was notified prior to the assignment that the period would extend for more than twenty (20) consecutive working days (160 hours), the employee shall have their salary adjusted upward for the entire period the assignment is in effect, beginning immediately.
2. Compensation for an employee required to work out of classification will be at the first step of the higher range or at a step within that range which will provide at least a five percent (5%) increase over their regular salary, whichever is greater.
3. Working out of classification is contingent upon the needs of the Authority. All such assignments shall be subject to the prior written approval of the Executive Director.
4. If an out of classification assignment has not been approved by the Executive Director in writing, no employee may expect or claim entitlement to out of classification pay.

VII. RETIREMENT BENEFITS AND AUTHORITY-PROVIDED INSURANCE

A. Pension Plan

The Authority shall contribute to a retirement pension plan at a rate established by the retirement plan administration. The employee shall contribute a set percentage based on the retirement plan contract. Participation in the retirement plan shall be limited to probationary and regular employees or temporary and seasonal employees who reach 1,000 hours in paid status.

B. Life Insurance

The Authority shall provide, at no cost to the employee, group life insurance coverage. Life insurance shall be limited to regular employees or those who have re-entered probationary status as a result of promotions. See plan documents for details.

C. Health Insurance

The Authority shall provide group medical, dental, and vision insurance coverage to each eligible employee and their eligible enrolled dependents. Short Term Temporary employees are not provided such insurance, unless otherwise required by applicable law. Premium costs shall be shared between the Authority and the employee through a cafeteria flex fund plan. See plan documents for details.

Health Insurance premiums paid by the Authority for part-time employees shall be proportionate to the employee's approved work schedule, unless otherwise authorized by the Executive Director.

D. Short-Term and Long-Term Disability Insurance

The Authority shall provide to regular employees, at no cost to the employee, short-term and long-term disability insurance coverage. See plan documents for details.

E. Accidental Death and Dismemberment Insurance

The Authority shall provide to regular employees, at no cost to the employee, accidental death and dismemberment insurance coverage. See plan documents for details.

F. Unemployment Insurance

The Authority shall provide, at no cost to the employee, unemployment insurance coverage. The cost and benefits shall be as mandated by the State of California.

G. State Disability Insurance

Disability insurance coverage shall be provided through the Authority, with premium costs paid by the employee. The cost of coverage and benefits shall be as mandated by the State of California.

H. Worker's Compensation Insurance

The Authority shall provide, at no cost to the employee, State of California mandated Workers' Compensation coverage. The level of benefits will be in accordance with the Workers' Compensation laws of the State of California.

VIII. HOLIDAYS

A. Scheduled Holidays

The Authority shall provide all eligible employees with the following paid holidays:

New Year's Day	January 1
Martin L. King's Birthday	Third Monday in January
President's Day	Third Monday in February
Cesar Chavez Day	March 31
Memorial Day	Last Monday in May
Juneteenth	June 19 th or Monday following
Independence Day	July 4
Labor Day	First Monday in September
Veteran's Day	November 11
Thanksgiving Day	Fourth Thursday in November
Friday after Thanksgiving	Friday after Thanksgiving
Winter Holiday #1	December 24
Winter Holiday #2	December 25

New Year's Eve	December 31
Floating Holiday	Requested by Employee

The Floating Holiday becomes available to benefitted employees on January 1st of each year, and is intended to be used during that calendar year. The Floating Holiday is of 8 hours duration, must be pre-approved by the employee's manager, and must be used entirely in one day. Floating holidays that are not used during the year in which they are allotted will be paid out at the end of the year at the employee's then regular rate of pay. All allotted floating holidays that have not been taken before departure of employment will be paid out at the employee's then regular rate of pay.

At the discretion of the Executive Director, employees may be granted special Board-designated holidays and shall be granted days designated as legal holidays by the Governor of the State of California or the President of the United States, if granted as a paid holiday for federal or state employees. These special holidays shall be with eight (8) paid hours providing the employee is in paid status for eight (8) hours (or a full day) of the working day immediately before or after the holiday.

1. Holidays falling on Saturday or Sunday shall be celebrated on the preceding Friday or following Monday, respectively.
2. An employee who is paid overtime for working on a holiday or Board-granted day off shall not receive an additional day off.
3. An employee on unpaid leave shall not receive holiday pay unless the employee is in paid status the full day before and the full day after the holiday. An employee receiving prorated pay during leave, for example integrating wages with SDI, will receive the same prorated holiday pay as s/he receives in prorated wages on adjacent work days.

B. Holidays Falling During Other Paid Leave

When a holiday occurs on a day an employee is absent from work because of sick leave, vacation or other paid leave, the employee shall be paid for the holiday and the day shall not be counted as a day of paid leave.

C. Part-time Employees

Holiday compensation for part-time employees shall be proportionate to the employee's approved work schedule. (e.g. an employee working in a 20 hour week or half-time position would receive four (4) hours of holiday compensation for a holiday occurring during the work week.) Holidays that occur on a day other than the part-time employee's regularly scheduled work day shall be compensated either by salary at straight time or by allowing the part-time employee to take time off in the same pay period for the hours which are proportionate to the part-time position. The approved work schedule shall be established upon employment in a part-time status.

IX. VACATIONS

A. Annual Vacations

As annual vacations for the Authority personnel are in the best interests of both the Authority and its staff members, ~~it is expected as a general rule that most~~ we encourage staff to utilize their vacation ~~credits shall be used~~ annually.

B. Vacation Accumulation

Vacation time for eligible staff shall be earned on an hourly basis and accrue at the following rates for full-time service:

- .0635 hour per hour of service for less than 10,400 hours of service in paid status.
- .0750 hour per hour of service for service in paid status of at least 10,401 hours of service but less than 20,800 hours of service.
- .0952 hour per hour of service for service in paid status of at least 20,801 hours of service but less than 31,200 hours of service.
- .1096 hour per hour of service for service in paid status of more than 31,201 hours of service.

Eligible employees with less than full-time service shall earn vacation hours proportionate to the authorized hours of their positions.

Years of service in paid status shall mean years since the employee's original anniversary date as defined in Section VI.C.4.

Vacation credit shall accrue for each employee beginning on the date of hire.

Vacation leave may be requested for personal reasons that do not fall under the sick leave policy (§ X.A), for example, personal appointments non-medical in nature, and time off to care for pets.

C. Vacation Pay

Pay for vacation days for all employees shall be at the same regular rate of pay as that which the employee would have received, exclusive of overtime payments, had the employee been in working status.

D. Vacation Pay upon Departure from Employment

When an employee is terminated for any reason or voluntarily resigns, the employee shall be entitled to all vacation pay earned and accrued while on paid status up to and including the effective date of the termination.

E. Holidays

Holidays falling during the scheduled paid vacation of any employee shall not be charged as a day of vacation.

F. Vacation Scheduling

Vacations shall be scheduled at times requested by employees so far as possible within the Authority's work requirements as established by the Executive Director. The vacation schedule shall be subject to the approval of the Department Head and/or Executive Director. Conflicts between employees as to when vacation shall be taken shall be resolved by the Executive Director, who shall determine the order of leave. Seniority, the order in which requests are received, and operational needs shall be considerations in such determinations.

All vacations shall be requested and scheduled in advance. Use of vacation leave for unplanned absences is discouraged; unplanned is defined as less than 5 days' notice.

G. Maximum Vacation Accrual Cap

An employee can accumulate a vacation leave balance of no more than 1.75 times the number of vacation hours that the employee can accrue annually based on the employee's accrual rate and full-time/part-time status.

Once an employee reaches the maximum vacation accrual cap, no further vacation hours shall accrue until such time as the employee's accrual drops below the maximum accrual cap. It is each employee's responsibility to track their vacation accrual and to schedule vacations in such a manner as to remain under their cap. No employee will be reimbursed for vacation hours that are not accrued because the employee was at the maximum vacation accrual cap.

H. Vacation Cash-Out

An employee whose vacation accrual exceeds 200 hours as of November 1st can request in writing a cash-out up to 40 hours vacation on the first pay date in December. Such a request will be granted unless the Executive Director determines that such a cash-out would be against the best interest of the Authority.

X. LEAVES

A. Sick Leave

The Authority provides paid sick time to eligible employees. Temporary employees will only receive sick time as mandated by California's Healthy Workplaces Healthy Families Act (HWHFA). Probationary, full-time, part-time, and long-term temporary employees will receive additional sick time as outlined below.

1. Eligibility

Employees become eligible for HWHFA paid sick time once they have worked in California for the Authority for 30 days within a year from the start of employment. Probationary, full-time, part-time, and temporary employees will accrue sick time as outlined below.

2. Annual Accrual of Paid Sick Time

Probationary, full-time, part-time, and temporary employees begin to accrue paid sick time on the first day of employment.

Paid sick time accrues on an hourly basis. Employees shall accrue .0462 hour of sick leave for each hour of service in paid status (including holidays, paid leaves and vacation). Sick leave may be accrued to a maximum of 480 hours.

Exempt employees are assumed to work 40 hours per workweek, unless their normal workweek is fewer than 40 hours per week, in which case accrued paid sick time is based upon that normal workweek.

Once the maximum accrual cap is reached, employees will not accrue additional paid sick time until their accrual balance falls below the cap.

Paid sick time may be used to cover all or just part of a work day.

Employees will not accrue paid sick time during unpaid leaves of absence.

Employees are not required to find an employee to cover their work when they take paid sick time.

3. Reasons Sick Time May be Used

Employees may use paid sick time for themselves and their [eligible](#) family members:

- For diagnosis, care or treatment of an existing medical condition; or
- For preventive care;
- Employees may also use paid sick time for safe time purposes if the employee is a victim of domestic violence, sexual assault or stalking and time off is needed to:
 - Obtain or attempt to obtain any relief (e.g., a temporary restraining order, restraining order or other injunctive relief) to help ensure the health, safety or welfare of the victim or their child;
 - Seek medical attention for injuries caused by domestic violence, sexual assault or stalking;
 - Obtain services from a domestic violence shelter, program or rape crisis center as a result of domestic violence, sexual assault or stalking;
 - Obtain psychological counseling related to an experience of domestic violence, sexual assault or stalking; or
 - Participate in safety planning and take other actions to increase safety from future domestic violence, sexual assault or stalking, including temporary or permanent relocation.
- For purposes of this policy, "eligible family members" include a:
 - Spouse;
 - Biological, adopted or foster child, stepchild, legal ward or a child to whom the employee stands in loco parentis;
 - Biological, adoptive or foster parent, stepparent, or legal guardian of an employee or the employee's spouse or registered domestic partner or a person who stood in loco parentis when the employee was a minor child;
 - Sibling;
 - Grandparent or grandchild; ~~and~~
 - [Registered domestic partner \(as defined by state or local law\), as well as the child or parent of a registered domestic partner; and](#)
 - [Designated person, who is person identified by the employee at the time the employees requests to use sick leave.](#)

The definition of "child" applies irrespective of a child's age or dependency status. [Employees are limited to one designated person per 12-month period.](#)

4. Requesting Paid Sick Time

When the need for paid sick time use is foreseeable, employees must provide reasonable advance verbal or written notice to their supervisor for any absence from work. If the need for paid sick time is unforeseeable, employees must provide notice to their supervisor of the need to use the time as soon as practicable. In all circumstances, employees must specify that the requested time off is for sick or safe time reasons (as opposed to, for example, vacation time), so that the absence may be designated accordingly. Failure to obtain approval as soon as possible after determining the need to take such time may result in discipline.

5. Rate of Pay for Sick Time

For nonexempt employees, pay for sick time is calculated in the same manner as the employee's regular rate of pay for the workweek in which the employee uses sick time, regardless of whether the employee works overtime in that workweek. For exempt employees, payment for sick time is calculated in the same manner as wages are calculated for other forms of paid leave time.

6. Carryover

Accrued but unused paid sick time will carry over from year to year, subject to the maximum accrual cap.

7. Separation from Employment

Compensation for accrued and unused sick time is provided upon separation from employment ~~for any reason as set forth below.~~

~~When an employee separates from service with the Authority, there shall be cash payment for accrued and unused sick leave as set forth below:~~

- ~~• Employees with 10,400 to 20,800 hours of service in paid status: payment equal to 50% of accrued and unused paid sick leave~~
- ~~• Employees with 20,801 to 31,200 hours of service in paid status: payment equal to 75% of accrued and unused paid sick leave~~
- ~~• Employees with over 31,200 hours of service in paid status: payment equal to 100% of accrued and unused paid sick leave~~

Alternatively, the separating employee may have the option to purchase CalPERS service credit with the accrued and unused sick time. See Human Resources for details.

No payment for sick leave shall be made until an employee submits a leave request, and receives approval from the Department Head.

8. Confidentiality

The Authority will keep confidential the health information of the employee or employee's covered family member, as well as information related to domestic violence perpetrated against or sexual assault of the employee or employee's covered family member. Such information will not be disclosed except to the affected employee as permitted or required by law.

9. Effect on Other Rights and Policies

The Authority may provide other forms of leave for employees to care for medical conditions or for issues related to domestic violence under certain federal, state and municipal laws. In certain situations, leave under this policy may run at the same time as leave available under another federal, state or municipal law, provided eligibility requirements for that law are met. The Authority is committed to complying with all applicable laws. Employees should contact Human Resources for information about other federal, state and municipal domestic violence, medical or family leave rights.

10. No Discrimination or Retaliation

The Authority prohibits discrimination and/or retaliation against employees who request or use paid sick time for authorized circumstances or for making a complaint or informing a person about a suspected violation of this policy. Likewise, the Authority prohibits discrimination and/or retaliation for cooperating with city or state officials in investigating claimed violations of any paid sick leave law (including the HWHFA), cooperating or participating in any investigation, administrative hearing or judicial action regarding an alleged violation, opposing any policy or practice that is prohibited by any paid sick leave law, or informing any person of their potential rights under the law.

11. Sick Leave Cash-Out

If the Executive Director deems it appropriate given operating and financial conditions, the Authority may from time to time provide the opportunity for eligible employees to cash out a portion of their accrued and unused sick leave.

B. Bereavement Leave

Employees are entitled to up to five (5) days of Bereavement Leave to attend to the funeral and/or other obligations arising from the death of a covered family member. Covered family members are defined as an employee's spouse, child, parent, sibling, grandparent, grandchild, domestic partner, or parent-in-law. Employees will be eligible to take up to a total of five (5) days of paid Bereavement Leave each calendar year. Bereavement Leave requests should be submitted through the timekeeping system with a comment added noting reason for requested leave. The Authority may request verification of the need for Bereavement Leave. Employees may use accrued sick or vacation leave should they need to utilize more than five (5) days of leave for bereavement of a covered family member or for an individual who is not a covered family member.

C. Reproductive Loss Leave

Employees are entitled to up to five (5) days of Reproductive Loss Leave following a reproductive loss event. Employees who have not used all of their five (5) days of paid Bereavement Leave in a calendar year may use the unused paid Bereavement Leave for Reproductive Loss Leave. Employees are eligible to use a maximum of five (5) days of paid time off for Bereavement Leave and/or Reproductive Loss Leave. Except as provided above, Reproductive Loss Leave is unpaid, and Employee may use their accrued sick and/or vacation time to be paid while on Reproductive Loss Leave. An employee who experiences more than one reproductive loss event within a 12-month period may take a total of 20 days of reproductive loss leave within a 12-month period. Reproductive Loss Leave requests should be submitted through the timekeeping system as sick or vacation leave with a comment added noting reason for requested leave. The Authority may request verification of the need for Reproductive Loss Leave.

For purposes of this Policy, a reproductive loss event is defined as the following:

- Failed adoption, meaning the dissolution or breach of an adoption agreement with the birth mother or legal guardian, or an adoption that is not finalized because it is contested by another party, where the employee would have been a parent of the adoptee if the adoption had been completed.
- Failed surrogacy, meaning the dissolution or breach of a surrogacy agreement, or a failed embryo transfer to the surrogate, where the employee would have been a parent of a child born as a result of the surrogacy.
- Miscarriage by the employee, the employee's current spouse or domestic partner, or another individual where the employee would have been a parent of a child born as a result of the pregnancy.
- Stillbirth resulting from the pregnancy of the employee, the employee's current spouse or domestic partner, or another individual where the employee would have been a parent of a child born as a result of the pregnancy.
- Unsuccessful assisted reproduction, which is defined as an unsuccessful round of intrauterine insemination or of an assisted reproductive technology procedure for the employee, the employee's current spouse or domestic partner, or another individual where the employee would have been a parent of a child born as a result of the pregnancy.

Reproductive Loss Leave days need not be taken consecutively but generally must be completed within three (3) months of the reproductive loss event. For a reproductive loss event that spans multiple days, the event is deemed to occur on the final day of the event. If an employee is on, or chooses to go on, a leave of absence under state or federal law (including California Family Rights Act leave or pregnancy disability leave), either prior to or immediately following a reproductive loss event, the employee must complete the Reproductive Loss Leave within three (3) months of the end date of the other leave.

The Authority will maintain the confidentiality of any employee requesting Reproductive Loss Leave. Any information provided to the Authority regarding Reproductive Loss Leave will be maintained as confidential and will not be disclosed except to internal personnel or counsel, as necessary, or as required by law.

C.D. Workers' Compensation

The Authority will grant eligible employees a workers' compensation leave in accordance with state law if you sustain an occupational illness or injury that prevents you from working. As an alternative, the Authority may offer you modified work. Leave taken due to a work-related injury or illness runs concurrently with family and medical leave under both federal and state law for eligible employees.

Employees must report all accidents, injuries, and illnesses, no matter how minor, to their immediate supervisor as soon as possible.

An employee who is eligible for workers' compensation temporary disability benefits may choose to use accumulated sick leave for the waiting period prior to receipt of temporary disability benefits.

Employees may not use sick leave to receive more than 100 percent of their compensation at any time (whether they are receiving worker's compensation or short term disability).

D.E. Jury Duty

An employee shall be entitled to leave without loss of pay for time the employee is required to perform jury duty. The Authority shall pay the employee the difference, if any, between the amounts received for jury duty and the employee's regular pay. This requires the employee to provide documentation to the Authority of jury duty payments. (An employee may be asked to and may sign a waiver of payment by the court of the jury duty fee). Any meal, mileage, and/or parking allowance provided the employee for jury duty shall not be considered in the amount received for jury duty. Jury duty shall be paid for a period not to exceed 60 working days. Extended jury duty beyond that would be granted as leave without pay, pursuant to Section X.H.3. Exempt employees will not have their salary reduced for partial weeks of work due to jury duty or witness service.

E.F. Catastrophic Closure

In the event of a natural disaster or equivalent event for which the Board of Commissioners or the Executive Director deems it necessary to temporarily close an affected Authority facility, the Executive Director shall authorize pay for the time not worked by employees subject to the limitations of this section. Employees ordered to leave work or ordered not to report to work shall receive "other leave with pay" as follows:

- First Eight Hours: one (1) hour for each scheduled hour missed.
- Second Eight Hours: one-half (1/2) hour for each scheduled work hour missed, which may be supplemented by vacation leave.
- Third Eight Hours: one-half (1/2) hour for each scheduled work hour missed, which may be supplemented by vacation leave.

Additional Hours: No compensation, except employees may use paid time off (i.e. administrative leave, or vacation, any compensatory time balance remaining).

F.G. Administrative Leave

Department Directors who are ineligible for premium overtime are entitled to 40 hours of administrative leave with pay each fiscal year. The requested leave shall be subject to prior approval by the Executive Director. Unused administrative leave will be paid out by check or direct deposit at the end of the fiscal year at the employee's then regular rate of pay.

G.H. Break in Service

No absence under any paid leave provisions of this article shall be considered as a break in service for any employee who is in paid status, and all benefits accruing under the provisions of these policies shall continue to accrue under such absence.

H.I. Personal Leave of Absence Without Pay

A regular employee who has used all accrued paid leave, including vacation, administrative, holiday, or other, and who requests to be absent from work, may be granted a leave of absence without pay at the discretion of the Executive Director or their designee. A personal leave may not exceed 2,080 hours of total leave time. If the employee needs to take unpaid medical leave or leave as reasonable accommodation, the time off will be provided under the medical leave policy set forth below.

1. Request for Leave. The employee is required to submit a letter of request to the Executive Director which states specific reasons for the personal leave and includes any documentation required by the Executive Director.
2. Failure to Return. Any employee who fails to return upon the expiration of any leave of absence without pay shall be regarded as having voluntarily resigned.
3. Effect of Leave of Absence Without Pay on Service Hours and Benefits. Periods of a leave of absence without pay shall not be included as hours in paid service for purposes of seniority, step advancement, probationary period, or vacation and sick leave credit, except as may be required by law. Periods of leave of absence without pay will result in a prorated (decreased) agency contribution toward Authority benefits, including, health insurance, dental insurance, and vision insurance for employees and dependents, except where such proration is prohibited by law or other policies such as FMLA and PDL.
4. Reinstatement following a personal leave is not guaranteed.

J.J. Medical Leave of Absence

Employees who believe they need a medical leave of absence should contact Human Resources and request one. Determinations regarding whether to grant the leave, the length of the leave, reinstatement following the leave and continuation of benefits will be made in accordance with applicable law. Leave under this policy runs concurrently with leave under all applicable local, state or federal law. Medical certification of the need for a leave may be requested.

J.K. Family and Medical Leave Act (FMLA) and California Family Rights Act (CFRA) Leave

The Authority will grant family and medical leave in accordance with the requirements of applicable federal and state law in effect at the time the leave is granted. Although the federal and state laws have different names, the Authority refers to the federal Family and Medical Leave Act (Fed-FMLA) and the California Family Rights Act (CFRA) collectively as "FMLA Leave." In any case, employees will be eligible for the most generous benefits available under applicable law.

1. Employee Eligibility

To be eligible for FMLA Leave, employees must: (1) have been employed by the Authority for a total of at least 12 month (52 weeks) at any time prior to the commencement of a FMLA leave; (2) have worked at least 1,250 hours over the previous 12 months as of the start of the leave. Eligibility requirements may differ for employees who have been on a protected military leave of absence. If employees are unsure whether they qualify for FMLA Leave, they should contact Human Resources.

2. Reasons for Leave

Federal and state laws allow FMLA Leave for various reasons. Because employees' legal rights and obligations may vary depending upon the reason for the FMLA Leave, it is important to identify the purpose or reason for the leave. Fed-FMLA leave and CFRA leave run concurrently except for the following reasons: to care for a registered domestic partner, a child of a registered domestic partner, an adult child, a grandparent, a grandchild, a sibling or a parent-in-law (CFRA only), incapacity due to pregnancy or prenatal care as a serious health condition (Fed-FMLA only), qualifying exigency leave (Fed-FMLA only) and military caregiver leave (Fed-FMLA only). Additionally, CFRA coverage for an employee's own serious health condition that also constitutes a disability under the California's Fair Employment and Housing Act (FEHA) is separate and distinct from FEHA protections. If the employee

cannot return to work at the expiration of the CFRA leave, the Authority will engage the employee in the interactive process to determine whether an extension of the leave would be a reasonable accommodation under the FEHA.

FMLA Leave may be used for one of the following reasons:

- The birth, adoption or foster care of an employee's child within 12 months following birth or placement of the child (Bonding Leave);
- To care for an immediate family member (spouse, registered domestic partner, child, child of a registered domestic partner, parent, grandparent, grandchild, sibling or parent-in-law) with a serious health condition (Family Care Leave);
- An employee's inability to work because of a serious health condition (Serious Health Condition Leave);
- A "qualifying exigency," as defined under the Fed-FMLA, arising from a spouse's, child's or parent's "covered active duty" as a member of the military reserves, National Guard or Armed Forces (Qualifying Exigency Leave); or
- To care for a spouse, child, parent or next of kin (nearest blood relative) who is a "Covered Servicemember" (Military Caregiver Leave).

3. Definitions

"Child," for purposes of Bonding Leave and Family Care Leave, means a biological, adopted or foster child; a stepchild; a legal ward; or a child of a person standing in loco parentis, who is either under age 18, or age 18 or older and incapable of self-care because of a mental or physical disability at the time that Fed-FMLA Leave is to commence. For CFRA leave, a "child" may be any age and there is no requirement that a "child" aged 18 or older be incapable of self-care because of a mental or physical disability at the time the CFRA leave is to start. "Child," for purposes of Qualifying Exigency Leave and Military Caregiver Leave, means a biological, adopted or foster child; stepchild; legal ward; or a child for whom the person stood in loco parentis, and who is of any age.

"Parent," for purposes of this policy, means a biological, adoptive, step or foster father or mother, or any other individual who stood in loco parentis to the person. For Qualifying Exigency Leave taken to provide care to a parent of a deployed military member, the parent must be incapable of self-care as defined by the FMLA.

"Covered Active Duty" means (1) in the case of a member of a regular component of the Armed Forces, duty during the deployment of the member with the Armed Forces to a foreign country; and (2) in the case of a member of a reserve component of the Armed Forces, duty during the deployment of the member with the Armed Forces to a foreign country under a call or order to active duty (or notification of an impending call or order to active duty) in support of a contingency operation as defined by applicable law.

"Covered Servicemember" means (1) a member of the Armed Forces, including a member of a reserve component of the Armed Forces, who is undergoing medical treatment, recuperation or therapy; is otherwise in outpatient status; or is otherwise on the temporary disability retired list, for a serious injury or illness incurred or aggravated in the line of duty while on active duty that may render the individual medically unfit to perform their military duties; or (2) a person who, during the five years prior to the

treatment necessitating the leave, served in the active military, Naval or Air Service, and who was discharged or released under conditions other than dishonorable (a "veteran" as defined by the Department of Veteran Affairs), and who has a qualifying injury or illness incurred or aggravated in the line of duty while on active duty that manifested itself before or after the member became a veteran. For purposes of determining the five-year period for covered veteran status, the period between October 28, 2009, and March 8, 2013, is excluded.

"Spouse" means a husband or wife. Husband or wife refers to the other person with whom an individual entered into marriage as defined or recognized under state law in the state in which the marriage was entered into or, in the case of a marriage entered into outside of any state, if the marriage is valid in the place where entered into and could have been entered into in at least one state. This definition includes an individual in a same-sex or common law marriage that either (1) was entered into in a state that recognizes such marriages; or (2) if entered into outside of any state, is valid in the place where entered into and could have been entered into in at least one state. For purposes of CFRA leave, a spouse includes a registered domestic partner or same-sex partners in marriage.

"Serious health condition" means an illness, injury, impairment or physical or mental condition that involves either:

- Inpatient care (including, but not limited to, substance abuse treatment) in a hospital, hospice or residential medical care facility, including any period of incapacity (that is, inability to work, attend school or perform other regular daily activities) or any subsequent treatment in connection with this inpatient care; or
- Continuing treatment (including, but not limited to, substance abuse treatment) by a health care provider that includes one or more of the following:
 - A period of incapacity (that is, inability to work, attend school or perform other regular daily activities due to a serious health condition, its treatment or the recovery that it requires) of more than three consecutive calendar days, and any subsequent treatment or period of incapacity relating to the same condition, that also involves treatment two or more times via an in-person visit to a health care provider, or at least one visit to a health care provider that results in a regimen of continuing treatment under the supervision of the health care provider.
 - Any period of incapacity due to pregnancy or prenatal care (under the Fed-FMLA, but not the CFRA).
 - Any period of incapacity or treatment for incapacity due to a chronic serious health condition that requires periodic visits to a health care provider, continues over an extended period of time and may cause episodic incapacity.
 - A period of incapacity that is permanent or long-term due to a condition for which treatment may not be effective, such as Alzheimer's, a severe stroke and the terminal stages of a disease.
 - Any period of absence to receive multiple treatments (including any period of recovery) by a health care provider either for (a) restorative surgery after an accident or other injury; or (b) a condition that would likely result in a period of incapacity of more than three consecutive calendar days in the absence of medical intervention or treatment.

"Serious injury or illness" in the case of a current member of the Armed Forces, National Guard or Reserves is an injury or illness incurred by a covered servicemember in the line of duty on active duty (or that preexisted the member's active duty and was aggravated by service in the line of duty on active duty)

in the Armed Forces that may render that individual medically unfit to perform the duties of their office, grade, rank or rating. In the case of a covered veteran, "serious injury or illness" means an injury or illness that was incurred in the line of duty on active duty (or existed before the beginning of the member's active duty and was aggravated by service in line of duty on active duty) and that manifested itself before or after the member became a veteran.

"Qualifying exigency" is defined by the Department of Labor and generally includes events related to short-notice deployment, military ceremonies, support and assistance programs, changes in childcare, school activities, financial and legal arrangements, counseling and post-deployment activities. Qualifying Exigency Leave may also be used to spend up to 15 days with military members who are on short-term, temporary, rest and recuperation leave during their period of deployment.

4. Length of Leave

If the reason for leave is common to both Fed-FMLA and CFRA and, therefore, running concurrently, the maximum amount of FMLA Leave will be 12 workweeks in any 12-month period when the leave is taken for: (1) Bonding Leave; (2) Family Care Leave; and (3) Serious Health Condition Leave. If the reason for leave is not common to both Fed-FMLA and CFRA and, therefore, not running concurrently, then an eligible employee may be entitled to additional leave under applicable law.

The applicable "12-month period" utilized by the Authority is the 12-month period measured forward from the start date of the employee's first FMLA leave. Under this method the 12-month period is measured forward from the day the employee uses any FMLA leave.

The maximum amount of Fed-FMLA Leave for an employee wishing to take Military Caregiver Leave will be a combined leave total of 26 workweeks in a single 12-month period. A "single 12-month period" begins on the date of the employee's first use of such leave and ends 12 months after that date.

If both spouses work for the Authority and are eligible for leave under this policy, under the Fed-FMLA, the spouses will be limited to a total of 26 workweeks off between the two when the leave is for Military Caregiver Leave only or is for a combination of Military Caregiver Leave, Bonding Leave and/or Family Care Leave taken to care for a parent.

To the extent required by law, leave beyond an employee's FMLA Leave entitlement will be granted when the leave is necessitated by an employee's work-related injury or illness, a pregnancy-related disability or a "disability" as defined under the Americans with Disabilities Act (ADA) and/or the Fair Employment and Housing Act (FEHA). When the reason for CFRA leave was the employee's serious health condition, which also constitutes a "disability" under the FEHA and the employee cannot return to work at the conclusion of the CFRA leave, the Authority will engage in an interactive process to determine whether an extension of leave would constitute a reasonable accommodation under the FEHA.

5. Intermittent or Reduced Schedule Leave

Under some circumstances, employees may take FMLA Leave intermittently, which means taking leave in blocks of time or reducing the employee's normal weekly or daily work schedule. An employee may take leave intermittently or on a reduced schedule whenever it is medically necessary to care for the employee's covered family member with a serious health condition or because the employee has a serious health condition. The medical necessity of the leave must be determined by the health care provider of the person with the serious health condition.

Intermittent or reduced schedule leave may also be taken for absences where the employee is incapacitated or unable to perform the essential functions of the job because of a chronic serious health condition, even if the person does not receive treatment by a health care provider.

Leave due to military exigencies may also be taken on an intermittent basis.

Leave taken intermittently may be taken in increments of no less than 15 minutes. Employees who take leave intermittently or on a reduced work schedule basis for planned medical treatment must make a reasonable effort to schedule the leave so as not to unduly disrupt the Authority's operations. Please contact Human Resources prior to scheduling medical treatment. If FMLA Leave is taken intermittently or on a reduced schedule basis due to planned medical treatment, we may require employees to transfer temporarily to an available alternative position with an equivalent pay rate and benefits, including a part-time position, to better accommodate recurring periods of leave.

If an employee using intermittent leave or working a reduced schedule finds it physically impossible to start or stop work mid-way through a shift in order to take CFRA leave and is therefore forced to be absent for the entire shift, the entire period will be counted against the employee's CFRA entitlement. However, if there are other aspects of work that the employee is able to perform that are not physically impossible, then the employee will be permitted to return to work, thereby reducing the amount of time to be charged to the employee's CFRA entitlement.

Requests for intermittent or reduced schedule leave for the birth or placement of a child may be directed to Human Resources and will be considered on a case-by-case basis depending on the needs of the Authority. If the request is granted, the Authority may require the employee to transfer temporarily to an available alternative position.

Bonding, Family Care, Serious Health Condition and Military Caregiver Leave Requirements

Employees are required to provide:

- When the need for the leave is foreseeable, 30 days' advance notice or such notice as is both possible and practical if the leave must begin in fewer than 30 days (normally this would be the same day the employee becomes aware of the need for leave or the next business day);
- When the need for leave is not foreseeable, notice within the time prescribed by the Authority's normal absence reporting policy, unless unusual circumstances prevent compliance, in which case notice is required as soon as is otherwise possible and practical;
- When the leave relates to medical issues, a completed Certification of Health Care Provider form within 15 calendar days (for Military Caregiver Leave, an invitational travel order or invitational travel authorization may be submitted in lieu of a Certification of Health Care Provider form);
- Periodic recertification (as allowed by law); and
- Periodic reports during the leave.

In addition to other notice provisions, employees requesting leave for CFRA qualifying reasons must respond to any questions designed to determine whether an absence is potentially qualifying for leave under this policy. Failure to respond to permissible inquiries regarding the leave request may result in denial of CFRA leave protections. Similarly, an employee or the employee's spokesperson may be required to provide additional information needed to determine whether a requested leave qualifies for Fed-FMLA protections. An employee's failure to adequately explain the reason for the leave may result in the denial of Fed-FMLA protections.

Certification forms are available from Human Resources. At the Authority's expense, we may require a second or third medical opinion regarding the employee's own serious health condition for Fed-FMLA

purposes and, for CFRA purposes, the employee's own serious health condition or the serious health condition of an employee's family member. In limited cases, we may require a second or third opinion regarding the injury or illness of a Covered Servicemember. Employees are expected to cooperate with the Authority in obtaining additional medical opinions that we may require.

When leave is for planned medical treatment, employees must try to schedule treatment so as not to unduly disrupt the Authority's operation. Please contact Human Resources prior to scheduling planned medical treatment.

If an employee does not produce the certification as requested, the FMLA leave will not be protected.

6. Recertification After Grant of Leave

In addition to the requirements listed above, if an employee's Fed-FMLA leave is certified, the Authority may later require medical recertification in connection with an absence that the employee reports as qualifying for Fed-FMLA leave. For example, the Authority may request recertification if (1) the employee requests an extension of leave; (2) the circumstances of the employee's condition as described by the previous certification change significantly (e.g., employee absences deviate from the duration or frequency set forth in the previous certification; employee's condition becomes more severe than indicated in the original certification; employee encounters complications); or (3) the Authority receives information that casts doubt upon the employee's stated reason for the absence. In addition, the Authority may request recertification in connection with an absence after six months have passed since the employee's original certification, regardless of the estimated duration of the serious health condition necessitating the need for leave. Any recertification requested by the Authority will be at the employee's expense.

In addition to the requirement listed above, a recertification under the CFRA may only be requested at the expiration of the time period in the original certification for time off for the employee's own serious health condition.

If an employee does not produce the recertification as requested, the leave will not be CFRA protected.

7. Qualifying Exigency Leave Requirements

Employees are required to provide:

- As much advance notice as is reasonable and practicable under the circumstances;
- A copy of the covered servicemember's active duty orders when the employee requests leave and/or documentation (such as Rest and Recuperation leave orders) issued by the military setting forth the dates of the servicemember's leave; and
- A completed Certification of Qualifying Exigency form within 15 calendar days, unless unusual circumstances exist to justify providing the form at a later date.

Certification forms are available from Human Resources.

8. Failure to Provide Notice or Certification and to Return From Leave

Absent unusual circumstances, failure to comply with these notice and certification requirements may result in a delay or denial of the leave. If an employee fails to return to work at the leave's expiration and has not obtained an extension of the leave, the Authority may presume that the employee does not plan to return to work and has voluntarily terminated their employment.

9. Compensation During Leave

Generally, FMLA Leave is unpaid. However, employees may be eligible to receive benefits through state-sponsored programs or the Authority's sponsored wage-replacement benefit programs. Employees may also choose to use accrued vacation and sick leave, to the extent permitted by law and the Authority's policy. If employees elect to have wage-replacement benefits and accrued paid leave integrated, the integration will be arranged such that employees will receive no greater compensation than their regular compensation during this period. The use of paid benefits will not extend the length of FMLA Leave.

10. Benefits During Leave

The Authority will continue making contributions to employees' group health benefits during their leave on the same terms as if the employees had continued to actively work. This means that if employees want their benefits coverage to continue during their leave, they must also continue to make the same premium payments that they are now required to make for themselves or their dependents. Employees taking Bonding Leave, Family Care Leave, Serious Health Condition Leave and Qualifying Exigency Leave will generally be provided with group health benefits for a 12-workweek period. When the reason for leave is a pregnancy-related disability, which is a serious health condition under the Fed-FMLA but not the CFRA, and the employee takes additional time off that qualifies as CFRA leave, the Authority will continue the employee's health insurance benefits for up to a maximum of 12 workweeks in a 12-month period. Employees taking Military Caregiver Leave may be eligible to receive group health benefits coverage for up to a maximum of 26 workweeks. In some instances, the Authority may recover premiums it paid on an employee's behalf to maintain health coverage if the employee fails to return to work following FMLA Leave.

An employee's length of service will remain intact, but benefits such as vacation and sick leave may not accrue while on an unpaid FMLA Leave.

11. Job Reinstatement

Under most circumstances, employees will be reinstated to the same position they held at the time of the leave or to an equivalent position with equivalent pay, benefits and other terms and conditions of employment. If an employee becomes unqualified during CFRA leave as a result of not attending a necessary course, or renewing a license, the employee will be given a reasonable opportunity to fulfill those conditions upon returning to work. Further, the Authority may grant an employee's request to work a different shift, in a different or better position, or in a different location, that is better suited to the employee's personal needs upon returning from CFRA leave. The Authority will also consider a reasonable accommodation under the FEHA if the employee is returning from CFRA leave for their own serious health condition. However, employees have no greater right to reinstatement than if they had been continuously employed rather than taken leave. For example, if an employee would have been laid off or their position would have been eliminated even if he or she had not gone on leave, then the employee will not be entitled to reinstatement. However, if an employee has been replaced or the employee's position was restructured to accommodate the employee absence, the employee is entitled to reinstatement.

Prior to being allowed to return to work, an employee wishing to return from a Serious Health Condition Leave must submit an acceptable release from a health care provider that certifies the employee is able to resume work. For an employee on intermittent or reduced schedule FMLA Leave, such a release may be required up to once every 30 days if reasonable safety concerns exist regarding the employee's ability to perform their duties, based on the serious health condition for which the employee took the intermittent or reduced schedule leave.

Key employees may be subject to reinstatement limitations in some circumstances. If employees are considered a "key employee," those employees will be notified of the possible limitations on reinstatement at the time the employee requests a leave of absence, or when leave begins, if earlier.

12. Confidentiality

Documents relating to medical certifications, recertifications or medical histories of employees or employees' family members will be maintained separately and treated as confidential medical records, except that in some legally recognized circumstances, the records (or information in them) may be disclosed to supervisors and managers, first aid and safety personnel or government officials.

13. Fraudulent Use of FMLA Leave Prohibited

An employee who fraudulently obtains FMLA Leave from the Authority is not protected by the Fed-FMLA's or the CFRA's job restoration or maintenance of health benefits provisions. In addition, the Authority will take all available appropriate disciplinary action against an employee due to such fraud.

14. Nondiscrimination

The Authority takes its FMLA Leave obligations very seriously and will not interfere with, restrain or deny the exercise of any rights provided by the Fed-FMLA or the CFRA. We will not terminate or discriminate against any individual for opposing any practice or because of involvement in any proceeding related to the Fed-FMLA or CFRA. If an employee believes that their Fed-FMLA or CFRA rights have been violated in any way, he or she should immediately report the matter to Human Resources.

Employees should contact Human Resources as to any Fed-FMLA or CFRA questions they may have.

15. Additional Information About Federal FMLA Leave

A "Notice to Employees of Rights Under FMLA" (WHD Publication 1420) is available at www.dol.gov or from Human Resources and is attached the handbook.

K.L. Pregnancy and Pregnancy Related Disabilities Leave and Accommodation

1. Pregnancy Disability Leave

Any employee who is disabled by pregnancy, childbirth, or a related medical condition (including medical conditions related to lactation) is eligible for up to four months of pregnancy disability leave. There is no length of service requirement.

For purposes of this policy, you are "disabled by pregnancy" when, in the opinion of your healthcare provider, you cannot work at all or are unable to perform any one or more of the essential functions of your job or to perform them without undue risk to yourself, the successful completion of your pregnancy, or to other persons as determined by a health care provider. The term "disabled" also applies to certain pregnancy-related conditions, such as severe morning sickness or if you need to take time off for prenatal or postnatal care, bed rest, post-partum depression, and the loss or end of pregnancy (among other pregnancy-related conditions that are considered to be disabling).

2. Reasonable Accommodation for Pregnancy-Related Disabilities

Any employee who is affected by pregnancy may also be eligible for a temporary transfer or another accommodation. There is no length of service requirement. You are affected by pregnancy if you are pregnant or have a related medical condition, and because of pregnancy, your health care provider has

certified that it is medically advisable for you to temporarily transfer or to receive some other accommodation.

The Authority will provide a temporary transfer to a less strenuous or hazardous position or duties or other accommodation to an employee affected by pregnancy if:

- She requests a transfer or other accommodation;
- The request is based upon the certification of her health care provider as “medically advisable”; and
- The transfer or other requested accommodation can be reasonably accommodated pursuant to applicable law.

No additional position will be created and the Authority will not discharge another employee, transfer another employee with more seniority, or promote or transfer any employee who is not qualified to perform the new job as a part of the accommodation process.

Examples of reasonable accommodations include: (1) modifying work schedules to provide earlier or later hours; (2) modifying work duties, practices or policies; (3) providing time off; (4) providing furniture (such as stools) and modifying equipment and devices; and (5) providing additional break time for lactation or trips to the restroom. If time off or a reduction in hours is granted as a reasonable accommodation, the Authority will consider the reduced hours/time off as pregnancy disability leave and deduct those hours from an employee's four-month leave entitlement.

3. Advance Notice and Medical Certification

To be approved for a pregnancy disability leave of absence, a temporary transfer or other reasonable accommodation, you must:

- Provide 30 days' advance notice before the leave of absence, transfer or reasonable accommodation is to begin, if the need is foreseeable;
- Provide as much notice as is practicable before the leave, transfer or reasonable accommodation when 30 days' notice is not foreseeable; and
- Provide a signed medical certification from your health care provider that states that you are disabled due to pregnancy or that it is medically advisable for you to be temporarily transferred or to receive some other requested accommodation.

The Authority may require you to provide a new certification if you request an extension of time for your leave, transfer or other requested accommodation.

Failure to provide the Authority with reasonable advance notice may result in the delay of leave, transfer or other requested accommodation.

4. Duration

The Authority will provide you with a Pregnancy Disability Leave of Absence for the duration of your pregnancy-related disability for up to four (4) months. This leave may be taken intermittently or on a continuous basis, as certified by your health care provider. The four months of leave available to an employee due to her pregnancy related disability is defined as the number of days (and hours) the employee would normally work within four calendar months or 17.33 workweeks.

The Authority may require an employee to temporarily transfer to an available alternative position to meet the medical need of the employee to take intermittent leave or work on a reduced schedule as certified by the employee's health care provider. The employee must be qualified for the alternative position, which will have an equivalent rate of pay and benefits, but not necessarily equivalent job duties.

Any temporary transfer or other reasonable accommodation provided to an employee affected by pregnancy will not reduce the amount of Pregnancy Disability Leave time the employee has available to her unless the temporary transfer or other reasonable accommodation involves a reduced work schedule or intermittent absences from work.

The length of the transfer will depend upon the employee's physical condition before and after childbirth.

5. Reinstatement

If you and the Authority have agreed upon a definite date of return from your leave of absence or transfer, you will be reinstated on that date if you notify the Authority that you are able to return on that date. If the length of the leave of absence or transfer has not been established, or if it differs from the original agreement, you will be returned to work within two (2) business days, where feasible, after you notify the Authority of your readiness to return.

Before you will be allowed to return to work in your regular job following a leave of absence or transfer, you must provide the Human Resources department with a certification from your health care provider that you can safely perform all of the essential duties of your position, with or without reasonable accommodation. If you do not provide such a release prior to or upon reporting for work, you will be sent home until a release is provided. This time before the release is provided will be unpaid.

Employees will be returned to the same position upon the conclusion of their leave of absence or transfer unless the position ceases to exist. In cases where the employee's position no longer exists, the Authority will provide a comparable position on the scheduled return date or within 60 calendar days of that return date. However, employees will not be entitled to any greater right to reinstatement than if they had not taken the leave.

To the extent required by law, some extensions beyond an employee's pregnancy disability leave entitlement may be granted when the leave is necessitated by an employee's injury, illness or "disability" as defined under the Americans with Disabilities Act and/or applicable state or local law.

The Authority will not discriminate or retaliate against employees because they request or make use of leave, a transfer or other accommodations in accordance with this policy. This policy does not limit a pregnant employee's rights under any other policy or laws protecting gender, pregnancy and childbirth, or health conditions related to pregnancy or childbirth.

6. Integration with Other Benefits

Pregnancy Disability Leaves of Absence and accommodations that require you to work a reduced work schedule or to take time off from work intermittently are unpaid. You may elect to use accrued sick leave or vacation leave during the leave of absence. However, use of such time off will not extend the available leave of absence time. Vacation and sick leave hours will not accrue during any unpaid portion of the leave of absence, and you will not receive pay for official holidays that are observed during your leave of absence except during those periods when you are substituting vacation or sick leave for unpaid leave.

Employees should apply for California State Disability insurance ("SDI") benefits. SDI forms are available from the Authority or your health care provider. Any SDI for which you are eligible will be integrated with

accrued vacation, sick leave, or other paid time off benefits so that you do not receive more than 100% of your regular pay.

7. Benefits

The Authority will maintain an employee's health insurance benefits during an employee's Pregnancy Disability Leave for a period of up to four months (as defined above) on the same terms as they were provided prior to the leave time. If you take additional time off following a Pregnancy Disability Leave that qualifies as California Family Rights Act leave, the Authority will continue your health insurance benefits for up to a maximum of 12 workweeks in a 12-month period.

In some instances, the Authority may recover premiums it paid to maintain health insurance benefits if you fail to return to work following your pregnancy disability leave for reasons other than taking additional leave afforded by law or Authority policy or not returning due to circumstances beyond your control.

L.M. Absence Without Leave

An employee absent from duty for a period which exceeds three (3) working days without authorized leave shall be considered to have abandoned their position and to have automatically resigned.

Such resignation shall be rescinded by the Executive Director if the employee can show to the satisfaction of the Executive Director that it was impossible to contact the human resources office or the employee's department head, provided the employee contacts the Authority at the first opportunity.

The employee may appeal the Executive Director's determination pursuant to Section XIV. The appeal is solely limited to the question of whether it was impossible for the employee to contact the Authority and whether the employee did contact the Authority at the first opportunity.

M.N. Suspension

Employees on disciplinary suspension shall not receive any paid leave or holiday pay for the period of suspension, nor accrue hours of service for purposes of step advancement or completion of probation.

N.O. Mandatory Leave With Pay

The Executive Director may require that an employee be absent from work with pay when the Executive Director deems it necessary for the protection or well-being of the employee, fellow employees, the public and/or the Authority, provided that such leave with pay shall not continue for more than thirty (30) working days.

O.P. Crime Victim Leave for Certain Felonies

The Authority prohibits discrimination against an employee who wishes to take time off from work to attend judicial proceedings related to certain violent, serious or theft/embezzlement related felonies committed against the employee, the employee's immediate family member, the employee's registered domestic partner or a child of the employee's registered domestic partner.

"Immediate family member" is defined as an employee's spouse, child, stepchild, brother, stepbrother, sister, stepsister, mother, stepmother, father or stepfather.

Before an employee may be absent from work to attend a judicial proceeding, the employee must give the employer a copy of the notice of each scheduled proceeding that is provided to the victim by the agency responsible for providing notice, unless advance notice is not feasible. When advance notice is

not feasible or an unscheduled absence occurs, the employee must provide within reasonable time documentation evidencing the judicial proceeding from (1) the court or government agency setting the hearing; (2) the district attorney or prosecuting attorney's office; or (3) the victim/witness office that is advocating on behalf of the victim.

Confidentiality of the situation, including an employee's request for the time off, will be maintained to the greatest extent possible.

Employees may use accrued benefits, such as vacation time or sick leave, in order to receive compensation during the time taken off from work.

P-Q. Leave To Attend Court Proceedings for Serious Crimes

The Authority prohibits discrimination against an employee who is a victim of certain serious criminal offenses and wishes to take time off to appear in court to be heard at any proceeding, including any delinquency proceeding, involving a post-arrest release decision, plea, sentencing, or post-conviction release decision or any proceeding in which a right of the victim is at issue.

A "victim" means any employee who suffers direct or threatened physical, psychological or financial harm as a result of the commission or attempted commission of a serious criminal offense. The term "victim" also includes the employee's spouse, registered domestic partner, parent, child, sibling or guardian.

Before employees may take time off under this policy, they must provide the Authority with reasonable advance notice of their intention to take time off, unless the advance notice is not feasible. If an employee must take an unscheduled absence due to victimization from a serious criminal offense, the employee must provide the Authority with a certification within a reasonable time. The types of certification to account for an unscheduled absence include: a police report indicating the employee was a victim of one of the specified serious criminal offenses; a court order protecting or separating the employee from the perpetrator of one or more of the specified offenses, or other evidence from the court or prosecuting attorney that the employee has appeared in court; or documentation from a medical professional, domestic violence counselor or advocate for victims of sexual assault, health care provider or counselor that the employee was undergoing treatment for physical or mental injuries resulting in victimization from one of the specific serious criminal offenses.

Confidentiality of the situation, including an employee's request for the time off, will be maintained to the greatest extent possible.

Employees may use accrued benefits, such as vacation time or sick leave, in order to receive compensation during the time taken off from work.

Q-R. Time Off for Domestic Violence Victims And Victims Of Sexual Assault Or Stalking

The Authority will provide time off to any employee who is a victim of domestic violence, sexual assault, and/or stalking so that the employee may obtain or attempt to obtain relief and to help ensure the health, safety, or welfare of the employee or the employee's child. The relief that may be sought includes, but is not limited to, a temporary restraining order, restraining order, or other injunctive relief. When taking such leave, the employee should give the Authority reasonable notice of the leave, unless advance notice is not feasible. The Authority also may require the employee to provide written verification of the need for the time off, such as a police report, court order or documentation from a medical professional, etc. The Authority will make reasonable accommodations for any employee who reports that he or she is the victim of domestic violence, sexual assault or stalking and requests that the Authority accommodate their safety while at work, unless undue hardship to the Authority would result. Additionally, an employee who is a

victim of domestic violence and/or a victim of sexual assault may take time off to attend to any of the following: (1) to seek medical attention for injuries caused by domestic violence; (2) to obtain service from a domestic violence shelter, program, or rape crisis center; (3) to obtain psychological counseling; and (4) to participate in safety planning and to take other actions to increase safety from future domestic violence or sexual assault, including temporary or permanent relocation.

If the reason for the leave is also covered by the federal Family and Medical Leave Act (FMLA) and/or the California Family Rights Act (CFRA), the leave pursuant to this policy and FMLA/CFRA will run concurrently. Therefore, the length of leave is limited to that provided under the FMLA and CFRA. For example, an employee is not entitled to time off due to reasons in this policy if he or she has already exhausted the maximum 12 weeks of leave under the FMLA/CFRA.

Confidentiality of the situation, including the employee's request for the time off, will be maintained to the greatest extent possible. Employees may use accrued benefits, such as existing vacation time or other accrued paid time off, in order to receive compensation during the time taken off from work.

R.S. Time Off To Vote

The Authority encourages all employees to fulfill their civic responsibilities and to vote in all public elections. Most employees' schedules provide sufficient time to vote either before or after working hours. If you do not have sufficient time outside of working hours to vote, you may receive up to two hours of paid time off to vote. Any additional time off will be without pay. Employees must request time off from their department head at least two working days before election day so that the necessary time off can be scheduled at the beginning or end of the work shift, whichever provides the least disruption to normal work schedules. If approved for time off, you will not incur any attendance infractions for missing work to vote.

S.T. Emergency Responder Leave

If you are a registered volunteer firefighter, reserve peace officer, or emergency rescue personnel who intends to perform emergency duty during work hours, alert your department head so that we are aware of the fact that you may have to take time off to perform emergency duty. In the event you need to take time off for this type of emergency duty, alert your supervisor or department head before leaving work. Employees will also be allowed up to 14 calendar days of leave per year to engage in fire, law enforcement or emergency rescue training. All time off for these purposes is unpaid.

T.U. School or Child Care Activities Leave

An employee who is a parent to one or more children who are of the age to attend a licensed child care provider, kindergarten or grades one through 12 may take up to 40 hours of leave per school year to participate in any of the following:

- Finding, enrolling or reenrolling the child in a school or with a licensed child care provider;
- Participating in school or child care-related activities; or
- Addressing a child care provider or school emergency.

"Parent" includes parent, guardian, stepparent, foster parent, grandparent, and persons who stand in loco parentis (in place of a parent) to a child.

Time off for reasons other than a child care provider or school emergency is limited to eight hours per calendar month. Child care provider or school emergencies occur when the child cannot remain in school or with a child care provider due to one of the following:

- The school or child care provider has requested that the child be picked up or has an attendance policy (excluding planned holidays) that prohibits the child from attending or requires that the child be picked up from school or child care;
- Behavioral or discipline problems;
- Closure or unexpected unavailability of the school or child care provider (excluding planned holidays);
- A natural disaster (e.g., fire, earthquake or flood).

Employees wishing to take time off for a planned absence (e.g., to participate in scheduled school or child care provider activities or enroll a child in school or with a child care provider), must provide reasonable advance notice to their supervisor. Employees needing time off to address a child care provider or school emergency must provide notice to their supervisor as soon as practicable.

The Authority may require employees to provide documentation from the school or child care provider verifying that the employee participated in the school or childcare activity, including the date and time of the activity.

If both parents of a child work for the Authority, only one parent - the first to provide notice - may take the time off, unless the Authority approves both parents taking time off simultaneously.

Employees must substitute any existing vacation time or other accrued paid time off (PTO) for any part of this leave. Employees who do not have vacation time or PTO available will be allowed time off without pay.

U.V. School Conference Leave

Employees who are the parent or custodial guardian of a child in kindergarten or grades one through 12 may take time off to attend a school conference involving their child.

To be eligible for leave, the child must be living with the employee, and the employee must provide advance notice that their appearance at the school has been requested.

The Authority may require employees to provide documentation, including a copy of the school's notice or some other certification stating that the employee's presence at the school is mandatory.

Employees wishing to take such leave may utilize their existing vacation time or other accrued paid time off.

School visits for other purposes may be covered under the Authority's School or Day Care Activities Leave policy.

V.W. Time Off for Bone Marrow Donation

Employees will be provided a leave of absence to undergo a medical procedure to donate bone marrow to another person. The combined length of bone marrow leave may not exceed five workdays in any one-year period. To qualify for this leave, the employee must submit verification by a physician detailing that there is a medical necessity for the donation, as well as the length of each leave requested. Employees

must use earned sick/vacation concurrently with this time off. If an employee does not have enough earned sick/vacation time to cover the leave, the remaining days of leave will be with pay by the Authority. Use of this leave will not be counted against any available FMLA/CFRA time. This is also not considered a break in service for purposes of benefits or seniority. While on leave for bone marrow donation, the Authority will maintain all group health insurance benefits as if the employee was still at work.

In most circumstances, upon return from this leave, an employee will be reinstated to their original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions. However, an employee has no greater right to reinstatement than if the employee did not take a leave. For example, if an employee on leave for bone marrow donation would have been laid off had the employee not taken a leave, or if the employee's job is eliminated during the leave and no equivalent or comparable job is available, then the employee would not be entitled to reinstatement.

W.X. Time Off for Organ Donation

Employees will be provided a leave of absence to undergo a medical procedure to donate an organ to another person. The combined length of the leaves may not exceed 60 business days, 30 workdays with pay and 30 workdays without pay in any one-year period. To qualify for this leave, the employee must submit verification by a physician detailing that there is a medical necessity for the donation, as well as the length of each leave requested. Employees must use their available sick/vacation during the first two weeks of leave, and the remaining first 30 workdays of leave, if any, will be with pay by the Authority. If the employee cannot return to work following the first 30 workdays of leave, the employee can take additional 30 workdays of leave without pay. Use of this leave will be not be counted against any available FMLA/CFRA time. This is also not considered a break in continuous service for purposes of benefits or seniority. While on leave for organ donation, the Authority will maintain all group health insurance benefits as if the employee was still at work.

In most circumstances, upon return from this leave, an employee will be reinstated to their original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions. However, an employee has no greater right to reinstatement than if the employee did not take a leave. For example, if an employee on leave for organ donation would have been laid off had the employee not take a leave, or if the employee's job is eliminated during the leave and no equivalent or comparable job is available, then the employee would not be entitled to reinstatement.

X.Y. Other Leaves

The leaves of absence described above are intended to provide an overview of the leaves that may be available to employees. The Authority provides employees with all legally required leaves of absences. Employees may also be entitled to additional leaves of absence: Witness Service Leave, Military Leave, Family Military Leave, Civil Air Patrol Leave and Election Officer Leave. If you need time off for any reason, please check with the Human Resources department to determine whether you qualify to take a leave of absence.

XI. LAYOFFS, REORGANIZATIONS, REDUCTIONS IN SCHEDULED HOURS, AND FURLOUGHES

A. Reorganizations and Reductions in Employee Staffing

When required, a reorganization or reduction in employee overhead may be accomplished by layoffs, mandatory involuntary reduction in hours, voluntary part time schedules, or short-term furloughs without pay. The Executive Director will determine the method to be used for reorganizations and to reduce employee overhead.

B. Definitions

1. Layoff. A layoff is the involuntary permanent separation of an employee from the Authority because of lack of work, lack of funds, reorganization of positions or duties, or other reasons determined by the Executive Director to be in the best interest of the Authority.

2. Furlough. A furlough is the involuntary temporary separation of an employee from the Authority because of lack of work, lack of funds, or other reasons determined by the Executive Director to be in the best interest of the Authority. A furlough may be implemented to cover several non-continuous periods during the fiscal year. With the exception of the 2-week written notice requirement specified below, the terms of this policy shall not apply to a furlough.

3. Reduction of Hours. A reduction of hours is a mandatory or voluntary reduction in the number of scheduled hours for a position during a work week either on a temporary or permanent basis. Depending upon the amount of hours worked by the employee, the employee may have part-time status. With the exception of the 2-week written notice requirement specified below, the terms of this policy shall not apply to the reduction of hours.

C. Decision Process

The Executive Director shall have full discretion to determine the department in which the reorganization or reduction is to be made and the number and classes of positions to be impacted and the employees to be impacted.

D. Notice of Action

The Authority shall provide affected employees with two (2) weeks written notice of effective date of any action taken pursuant to this policy.

E. Order of Layoff

When it is necessary to lay off employees, the Executive Director shall prepare or cause to be prepared a list of the order of layoff based on the reasons for the layoff and the needs of the Authority.

F. Seniority for Purpose of Layoff, Displacement and Involuntary Reduction in Hours

Seniority rights for purposes of this policy shall be available only to Authority employees who have attained regular status. Seniority may be one factor that the Authority takes into consideration when determining order of layoff, displacement or involuntary reduction in hours.

For purposes of seniority under this policy only, an employee who is laid off by the Authority and rehired to a regular position within two (2) years of the date of the layoff shall be deemed to be continuously employed by the Authority. However, no seniority credit shall accrue while an employee has been laid off and is not working for the Authority.

XII. RESIGNATION AND RETIREMENT

A. Resignation

An employee who desires to terminate their employment shall submit a signed letter of resignation or retirement to the Executive Director or their designee. The Authority would appreciate notice at least two (2) weeks prior to the effective date of such resignation or retirement. The Executive Director, or their

designee, shall have the authority to accept letters of resignation or retirement and such letters shall be deemed accepted upon receipt by the Executive Director or their designee or supervisor.

XIII. GRIEVANCES

A. Grievance Procedure

The Authority recognizes that rapid grievance settlement is desirable and herein establishes a method for such settlement of employee grievances.

This grievance procedure is intended to provide a progressive series of steps through which employees may present grievances, with the aim of resolving grievances at the lowest administrative level consistent with the management representatives' authority.

Each employee and/or their representative shall be free from restraint, interference, coercion, discrimination or reprisal in utilizing this procedure.

A grievant is an employee with an alleged grievance. A grievance is an alleged misinterpretation, violation, or misapplication of these policies and procedures which affect the wages, hours or working conditions of the employee. Specifically excluded from the grievance procedure are dismissals, suspensions or other disciplinary actions.

1. Informal Resolution. Within ten (10) calendar days of the occurrence or discovery of an alleged grievance, the grievant may informally discuss the grievance with the immediate supervisor.

2. Formal Grievances. If the grievance is not settled through informal discussion, the grievant may file a formal grievance within twenty (20) calendar days of the occurrence or discovery of an alleged grievance. The formal grievance shall be presented by the aggrieved in writing to their Department Head. The grievance form shall contain information which:

- a. Identifies the aggrieved.
- b. Contains the specific nature of the grievance.
- c. Indicates the date, time and place of its occurrence.
- d. States the provision of the policies alleged to have been violated, improperly interpreted, applied or misapplied.
- e. Indicates the consideration given or steps taken to secure informal resolution including the date of informal discussion.
- f. States the corrective action desired.

A decision by the Department Head shall be made in writing within ten (10) business days of receipt of the grievance.

3. If the grievant is not satisfied by the Department Head's decision, the grievant may appeal such decision to the Human Resources Director by filing a written request with the Human Resources Director within seven (7) business days of receipt of the decision of the Department Head.

A decision by the Human Resources Director shall be made in writing within ten (10) business days of receipt of the grievance.

4. If the grievant is not satisfied by the Human Resources Director's decision, the grievant may appeal such decision to the Executive Director by filing a written request with the Executive Director within seven (7) business days of receipt of the decision of the Department Head.

The Executive Director shall render a written decision to the employee within ten (10) business days of the receipt of the written appeal. Copies of the decision shall be provided to the employee, the employee's representative, if any, the Department Head, and the Human Resources Director. The decision of the Executive Director shall be final.

B. General Provision

1. Time limits specified in the processing of grievances may be waived by mutual written agreement.
2. If an employee does not present their grievance or does not appeal the decision rendered regarding their grievance within the time limits, the grievance shall be considered resolved.
3. If the Department Head does not respond within the time limits provided, the aggrieved may proceed to the next step of this grievance procedure.
4. In the event either the responding employee and/or designated representative, their supervisor/department head, and/or Executive Director is on paid leave, approved leave of absence without pay or on assignment out of the jurisdiction for one day or more, the period of response for that party shall be extended for the period of such absence, following notification to the other party within the running time limit. This provision shall not extend the time in which an employee must file the initial formal grievance.
5. A copy of the grievance form shall be forwarded to the Executive Director when the formal grievance is filed.
6. In the event of an unusual number of grievances being filed, the Executive Director may consolidate like grievances and/or temporarily suspend grievance processing on a department-wide or Authority-wide basis.

XIV. DISCIPLINARY ACTIONS AND PERFORMANCE IMPROVEMENT

A. Disciplinary Actions and Performance Improvement Notices and Plans

This policy relates to the implementation of disciplinary actions and process of documenting the need for Performance Improvement of regular employees whose job performance, actions or behavior fall below acceptable standards.. The Authority does not follow a specific progressive disciplinary format but rather reserves the right to issue any type of notice in response to any conduct or performance issue up to and including termination. The Executive Director has the authority to choose to utilize any type of notice in response to a conduct or performance issue in the Executive Director's sole discretion.

B. Authority

Employees may be reprimanded, dismissed, suspended, reduced in compensation, demoted or otherwise disciplined by the Authority for conduct violations or performance issues.

C. Causes for Disciplinary Actions and Performance Improvement Notice

The following may be considered as causes for discipline and reasons for a performance improvement notice, or performance improvement plan, although there may be other causes creating a need for

performance improvement notice and further action up to and including termination. It is not possible to list all forms of behavior that are considered unacceptable in the workplace, but the following are examples of infractions that may result in the need to communicate performance improvement expectations or additional action such as suspension, demotion or termination of employment:

1. Fraud in securing appointment.
2. Incompetence or inefficiency.
3. Inexcusable neglect of duty.
4. Failure to comply with management's directions regarding job duties.
5. Unauthorized or wasteful use of public funds, supplies, and equipment.
6. Consumption and/or use of alcoholic beverages, narcotics, drugs, or other intoxicants during working time, on Authority premises or in a manner that interferes with job performance, or reporting for work under the influence of any of the same.
7. Current unlawful use or possession of controlled substances.
8. Violation of the attendance policy.
9. Engaging in any unlawful conduct during working time or on Authority premises.
10. Unethical treatment of the public or other employees.
11. Willful violation of Authority policy or regulations.
12. Negligent or willful damage or risk of damage, or use of Authority property in violation of Authority rules or applicable law.
13. Lack of integrity in completing job duties.
14. Dishonesty or fraud in completion of job duties.
15. Failure to maintain satisfactory working relationships with the public, other public agencies, and other employees.
16. Failure to report to duty at the assigned time and place, unless the reason is legally protected.
17. Violation of the confidentiality policy.
18. Falsification of employment records, employment information, or other records.
19. Failing to observe working schedules, including rest and lunch periods.
20. Working overtime without authorization..
21. Provoking a physical fight or physical fighting during working hours and/or on premises owned or occupied by the Authority.
22. Carrying firearms at any time on premises owned or occupied by the Authority.

23. Violation of the Authority's harassment, discrimination or retaliation policies.

D. Types of Disciplinary Action

Notices may be issued in any order at the Authority's sole discretion.

1. Verbal notice. A formal discussion with an employee about performance or conduct problems. This action may be documented by the supervisor or Department Head in memorandum form with a copy given to the employee.
2. Written performance improvement notice. A written report presented to an employee by the Department Head regarding performance or conduct problems. A copy shall be provided to the employee and a copy shall be filed in their official personnel file. Within five (5) business days following receipt of a written performance improvement notice, an employee shall be permitted to file a written response, the original being directed to the Department Head and a copy filed in the employee's official personnel file.
3. Salary Reduction. A reduction in pay from the employee's current step within a pay range to any lower step within the same range.
4. Demotion. Reduction from a position in one class to a position in another class having a lower salary range allocation.
5. Suspension. An involuntary suspension from work without pay for a period not to exceed six (6) months.
6. Dismissal. Discharge or removal from employment with the Authority.

E. Service of Notice of Intended Disciplinary Action ("Notice of Intent") and Notice of Disciplinary Action

Except in cases of verbal or written improvement notice, written notice of the other types of actions shall be served as set forth below. The date of such delivery shall initiate the period in which an appeal may be filed.

1. When possible, notice shall be served by personal delivery to the employee at the worksite.
2. If personal delivery to the employee at the worksite cannot be accomplished, notice of the intended disciplinary action shall be served by emailing a copy by secure email service or mailing a copy of the notice by regular first class United States mail, postage prepaid, to the employee at the last known address that the employee provided to the Authority. Such mailed notice shall be deemed to have been received by the employee five calendar days after dispatch by the Authority for purposes of computing the time limit for filing an appeal. If notice is mailed pursuant to this paragraph, and if the employee resides within the County of Santa Cruz, the Authority shall also deliver a copy of the notice to the employee's residence. The Authority may leave such copy in a mailbox, with a competent member of the household, or on the door of the residence.

F. Notice of Intent and Notice of Disciplinary Action

1. Except in cases of verbal and written notice of performance improvement, a written Notice of Intent shall be served on the employee at least five (5) business days prior to dispatch of the Notice of Disciplinary Action of Salary Reduction, Demotion, Suspension, or Dismissal .

- a. Prior to the effective date of the disciplinary action provided in the Notice of Intent, the employee and/or their representative shall have the right and opportunity to respond either verbally or in writing at a *Skelly* meeting, which shall be conducted within five (5) business days of request by employee. The *Skelly* review officer shall be appointed by the Housing Authority, and shall provide a brief written summary of the meeting and a conclusion as to whether there are reasonable grounds for believing that the employee engaged in the alleged performance issue or misconduct, and whether the performance issue or misconduct supports the proposed sanction.
 - b. At the expiration of the period of time to respond to the Notice of Intent or upon receipt of the *Skelly* officer's report, if the Authority determines that discipline should be imposed, a written Notice of Disciplinary Action shall be served on the employee. The Notice of Disciplinary Action shall advise the employee of the disciplinary determination arising out of the *Skelly* meeting and of the employee's right to appeal the Notice of Disciplinary Action through the appeal process set forth in Section G below. If the employee elects to appeal, the employee must provide written notice to the Executive Director, within seven (7) business days of the Notice of Disciplinary Action.
2. The Notice of Intent and the Notice of Disciplinary Action shall both be filed in the employee's personnel file. The Notice of Intent shall state, at minimum, the following:
 - a. A statement of the nature of the disciplinary action, and the effective date of the action.
 - b. A statement of the charges which are the cause of the action.
 - c. In ordinary and concise language, the act or omissions, or other reason(s) upon which the charges are based.
 - d. Copies of the documents relied upon to support such charges.
 - e. A statement advising the employee of their right to representation.
 - f. A statement advising the employee of their right to respond to the Notice of Intent, either verbally or in writing, within five (5) business days of the notice.
 3. If necessary for the safe and efficient operation of the Authority or the safeguard of public property, as determined by the Executive Director, suspension may be made effective immediately.

G. Appeal of Dismissals, Major Suspensions, Reductions and Demotions

Any regular employee subject to these policies and procedures shall have the right to appeal their dismissal, major suspension (more than five days), salary reduction or demotion as follows:

1. Within seven (7) business days after service of the Notice of Disciplinary Action, the employee may appeal the action to the Executive Director by filing written notice requesting an appeal with the Executive Director. The filing of an appeal shall not stay or delay the disciplinary action.

Upon receipt of the request for the appeal, the Authority, through its counsel or representative, will coordinate with the employee, through their counsel or representative, to select a neutral hearing officer. The parties may mutually agree upon the selection of a hearing officer, or if they are unable to agree, the parties shall request a list of seven labor hearing officers provided by the State Mediation and Conciliation Service (SMCS). The parties will specify, in their request to SMCS, that the hearing officers on the list must be members of the National Academy of Arbitrators. The hearing officer shall

then be selected by the parties using the alternate strike method. The last remaining name shall serve as the hearing officer. If unable to agree on who should strike first, the first name shall be struck by the party winning the toss of a coin.

2. Within 30 calendar days from the filing of the appeal, or later if the parties agree to a later date, the hearing officer shall commence a hearing on the matter. If either party wishes to have a transcript of the hearing, the requesting party will be solely responsible for all costs associated with the transcript. If both parties request a transcript, the cost will be shared equally. The expenses of the hearing officer may be shared equally by the parties. However, if the employee elects not to share in the expenses of the hearing officer, the expenses of the hearing officer shall be borne by the Authority. The hearing need not be conducted according to technical rules relating to evidence and witnesses. Any relevant evidence shall be admitted if it is the sort of evidence on which responsible persons are accustomed to rely in the conduct of serious affairs, regardless of the existence of any common law or statutory rule which might make improper the admission of the evidence over objection in civil actions. Hearsay evidence may be used for the purpose of supplementing or explaining other evidence but over timely objection shall not be sufficient in itself to support a finding unless it would be admissible over objection in civil actions. Within five (5) business days of completion of the hearing, or later if the parties agree to a later date, the hearing officer shall render an advisory opinion on the appeal to the Executive Director to either affirm, modify, or revoke the order of discipline. The appellant may appear personally, produce evidence, present and cross-examine witnesses, and be represented by counsel upon request. If the appellant requests a later hearing date or a continuance, the appellant shall be deemed to have waived any claim for additional compensation as a result of the delay in the event the appellant is ordered reinstated or the discipline is reduced.
3. The Executive Director shall render a written decision on the appeal of the disciplinary action to the appellant within ten (10) business days of the receipt of the hearing officer's advisory opinion. Copies of the decision shall be provided to the employee and the employee's representative. The decision of the Executive Director on the disciplinary action shall be final.

H. Procedure Relating to Criminal Action

The Authority may take disciplinary action when criminal charges are pending against an employee. However, where the facts alleged in the Notice of Disciplinary Action regarding dismissal, demotion, suspension or salary reduction constitute a crime, or where the employee has been charged with a crime arising out of the same transaction, and the employee has appealed the disciplinary action as provided herein, the employee may, at any time at least three (3) business days before the date of the hearing before the hearing officer, request a continuance of their hearing for a reasonable period to determine whether a criminal charge will be filed or until after termination of the criminal case. Such a request must be accompanied by the employee's written waiver of salary and other employment benefits for the period of that continuance in case the discipline is overturned or reduced.

XV. MISCELLANEOUS

A. Continuing Education

The Authority recognizes the benefits of education and encourages employees to take their own initiative to pursue education which will improve skills related to their current positions or provide skills for career advancement. Employee's should check with their department Director when taking any job related training or classes that may paid for by the Authority if directly related to their current or future role with the agency. The Authority may allow the use of paid vacation leave hours for educational pursuits

approved by the Executive Director. This may be in addition to training courses or conferences required by and paid for by the Authority.

B. Professional Growth Program

Insofar as practical, it is understood that employees shall be encouraged to take part in Authority workshops and seminars. Employees shall also be allowed travel allowances when attending out-of-jurisdiction conferences with the advance approval of the Authority.

C. Travel Policy

1. Travel Authorization. Employees are required to submit receipts for travel-related expenses. All travel expenses shall be subject to prior authorization by the Executive Director.

2. Overnight Travel. Employees of the Authority shall be reimbursed for travel expenses in accordance with the Authority's "Travel Procedure" (#4010).

3. Private Vehicle Mileage. An employee shall be reimbursed for use of a privately owned vehicle for official Authority business based on current rate established under IRS regulations. An employee's commute to and from work is not reimbursable.

Reimbursement to the employee shall be made by the Authority monthly, upon submission of a Mileage Expense Voucher by the employee.

Reimbursement at the IRS rate shall be deemed to be full compensation for the costs of using private vehicles, including insurance, insurance deductibles, repairs, gas and depreciation, and employees shall be entitled to no additional compensation for the use of their vehicles.

4. Vehicle Use Requirements: Liability Insurance. Employees who drive private vehicles shall be required to have general automobile liability and property damage insurance, with limits not less than those required by State law, for any vehicle used on Authority business.

Employees who use privately owned vehicles for Authority business are fully and directly responsible for bodily injury and/or property damage to others resulting from such privately owned vehicle use.

Employees who drive any vehicle on Authority business (whether private or Authority-owned) must have a current valid Driver's License and state-required insurance. Employees shall show proof of a current valid Driver's License and insurance upon request of the Authority. Employees who drive on Authority business without a current valid Driver's License and required insurance, shall, in addition to being subject to disciplinary action, not be entitled to mileage reimbursement. By using any vehicle on Authority business, each employee consents to being entered by the Authority into the California DMV's pull notice program.

D. Official Recommendations and References

All official requests for employment recommendations and references on behalf of the Authority shall be answered by the Executive Director or their designee and shall include the following information only: Title of each position held, beginning and ending dates of service in each such position. If you authorize disclosure in writing, we will also provide rates of pay received for each such position. Narrative references, written or verbal, shall not be provided in response to an official request for a recommendation or reference on behalf of the Authority. Employees may retain and provide copies of their performance evaluations for reference purposes. Employees are prohibited from responding to official requests for

reference on behalf of the Authority for other employees. Responding to an official request on behalf of the Authority can result in disciplinary action.

E. Return of Property

Employees are required to return all Authority property that is in their possession or control in the event of termination of employment, resignation or layoff, or immediately upon request. No information belonging to the Authority may be copied for the employee's use. The Authority may also take all action deemed appropriate to recover or protect Authority property.

F. Workplace Violence

The safety and security of employees is of vital importance to the Authority. Therefore, the Authority has adopted a zero-tolerance policy concerning workplace violence. Threats or acts of violence—including intimidation, bullying, physical or mental abuse and/or coercion—that involve or affect Authority employees or that occur on the Authority's premises will not be tolerated.

The prohibition against threats and acts of violence applies to all persons involved in the operation of the Authority, including, but not limited to, Authority employees and other personnel, contract and temporary workers, consultants, contractors, customers, vendors, visitors and anyone else on the Authority's premises.

Violations of this policy by an employee will result in disciplinary action, up to and including termination from employment.

It is our goal to have a workplace free from acts or threats of violence and to respond effectively in the event that such acts or threats of violence do occur.

Workplace violence is any intentional conduct that is sufficiently severe, abusive or intimidating to cause an individual to reasonably fear for their personal safety or the safety of their family, friends and/or property such that employment conditions are altered or a hostile, abusive or intimidating work environment is created for one or several employees.

Examples of workplace violence include, but are not limited to:

- Threats or acts of violence occurring on Authority premises, regardless of the relationship between the parties involved in the incident;
- Threats or acts of violence occurring off Authority premises involving someone who is acting in the capacity of a representative of the Authority;
- Threats or acts of violence occurring off Authority premises involving an employee if the threats or acts affect the business interests of the Authority;
- All threats or acts of violence occurring off Authority premises, of which an employee is a victim, if we determine that the incident may lead to an incident of violence on Authority premises; and
- Threats or acts of violence resulting in the conviction of an employee or agent of the Authority, or an individual performing services for the Authority on a contract or temporary basis, under any criminal code provision relating to violence or threats of violence when the act or conviction adversely affects the legitimate business interests of the Authority.

Examples of conduct that may be considered threats or acts of violence under this policy include, but are not limited to:

- Threatening physical contact directed toward another individual;
- Threatening an individual or their family, friends, associates or property with harm;
- The intentional destruction or threat of destruction of the Authority or another's property;
- Menacing or threatening phone calls;
- Stalking;
- Veiled threats of physical harm or similar intimidation; and/or
- Communicating an endorsement of the inappropriate use of firearms or weapons.

Workplace violence does not refer to workplace arguments or debates that are zealous or impassioned, provided there is no resort to any form of coercion. Discussions about sporting activities, popular entertainment or current events are not considered workplace violence when there is no threat of violence being directed to the workplace or any individual connected with it. Rather, workplace violence refers to behavior that demonstrates an intention to engage in violence, condones violence in our workplace, or targets any individual with acts or threats of violence.

Employees should help maintain a violence-free workplace. To that end, employees are encouraged to immediately report any incident that violates this policy to a supervisor or manager.

G. Injury and Illness Prevention Program

The health and safety of employees and others on Authority property are of critical concern to the Authority. We strive to attain the highest possible level of safety in all activities and operations. The Authority also intends to comply with all health and safety laws applicable to our business.

To this end, the Authority must rely upon employees to help keep work areas safe and free of hazardous conditions. Employees should be conscientious about workplace safety, including proper operating methods and known dangerous conditions or hazards. You should report any unsafe conditions or potential hazards to your supervisor immediately; even if you believe you have corrected the problem. If you suspect a concealed danger is present on the Authority's premises, or in a product, facility, piece of equipment, process, or business practice for which the Authority is responsible, bring it to the attention of your supervisor immediately.

Additionally, the Authority has developed a written Injury and Illness Prevention Program (IIPP) as required by law. A copy of the IIPP is available for your review from Human Resources. In addition to attending any training required by the Authority, it is your responsibility to read, understand and observe the IIPP provisions applicable to your job.

XVI. SEVERABILITY

If any section, subsection, or other part of this policy is for any reason held to be invalid by a court of competent jurisdiction, such invalidity shall not affect the remaining provisions of this policy.

XVII. REVISION OF POLICY AND PROCEDURES

These policies and procedures may be revised or amended at any regular meeting of the Board of Commissioners by a majority vote of the Board of Commissioners.

XVIII. ACKNOWLEDGEMENT AND RECEIPT

I acknowledge that I have received and read a copy of the Authority's Personnel Policies and Procedures (also called the "Personnel Policies") dated _____, 2023. I understand that these Personnel Policies sets forth the terms and conditions of my employment with the Authority as well as the duties, responsibilities and obligations of employment with the Authority. I understand that the Authority has provided me various alternative channels [including anonymous and confidential channels] to raise concerns of violations of these Personnel Policies and other Authority policies and procedures, and encourages me to do so promptly so that the Authority may effectively address such situations, and I understand that nothing herein interferes with any right to report concerns, make lawful disclosures, or communicate with any governmental authority regarding potential violations of laws or regulations. I agree to abide by and be bound by the rules, policies and standards set forth in these Personnel Policies.

I further acknowledge that the Authority reserves the right to revise, delete and add to the provisions of these Personnel Policies, but that all such revisions, deletions or additions must be in writing. No verbal statements or representations can change the provisions of these Personnel Policies. I understand and acknowledge that nothing in these Personnel Policies or in any other document or policy is intended to prohibit me from reporting concerns to, filing a charge or complaint with, making lawful disclosures to, providing documents or other information to or participating in an investigation or hearing conducted by the Equal Employment Opportunity Commission ("EEOC"), National Labor Relations Board ("NLRB") or any other federal, state or local agency charged with the enforcement of any laws.

I also understand and acknowledge that nothing about the policies and procedures set forth in these Personnel Policies should be construed to interfere with any employee rights provided under state or federal law, including Section 7 of the National Labor Relations Act.

I have read and understand the above statements.

Employee Signature

Print Name

Date

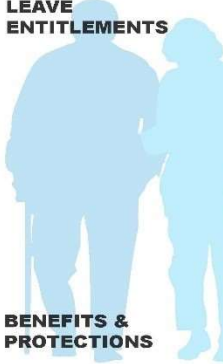
[TO BE PLACED IN EMPLOYEE'S PERSONNEL FILE]

XIX. EMPLOYEE RIGHTS UNDER THE FAMILY AND MEDICAL LEAVE ACT

EMPLOYEE RIGHTS UNDER THE FAMILY AND MEDICAL LEAVE ACT

THE UNITED STATES DEPARTMENT OF LABOR WAGE AND HOUR DIVISION

LEAVE ENTITLEMENTS



Eligible employees who work for a covered employer can take up to 12 weeks of unpaid, job-protected leave in a 12-month period for the following reasons:

- The birth of a child or placement of a child for adoption or foster care;
- To bond with a child (leave must be taken within 1 year of the child's birth or placement);
- To care for the employee's spouse, child, or parent who has a qualifying serious health condition;
- For the employee's own qualifying serious health condition that makes the employee unable to perform the employee's job;
- For qualifying exigencies related to the foreign deployment of a military member who is the employee's spouse, child, or parent.

An eligible employee who is a covered servicemember's spouse, child, parent, or next of kin may also take up to 26 weeks of FMLA leave in a single 12-month period to care for the servicemember with a serious injury or illness.

An employee does not need to use leave in one block. When it is medically necessary or otherwise permitted, employees may take leave intermittently or on a reduced schedule.

Employees may choose, or an employer may require, use of accrued paid leave while taking FMLA leave. If an employee substitutes accrued paid leave for FMLA leave, the employee must comply with the employer's normal paid leave policies.

BENEFITS & PROTECTIONS

While employees are on FMLA leave, employers must continue health insurance coverage as if the employees were not on leave.

Upon return from FMLA leave, most employees must be restored to the same job or one nearly identical to it with equivalent pay, benefits, and other employment terms and conditions.

An employer may not interfere with an individual's FMLA rights or retaliate against someone for using or trying to use FMLA leave, opposing any practice made unlawful by the FMLA, or being involved in any proceeding under or related to the FMLA.

ELIGIBILITY REQUIREMENTS

An employee who works for a covered employer must meet three criteria in order to be eligible for FMLA leave. The employee must:

- Have worked for the employer for at least 12 months;
- Have at least 1,250 hours of service in the 12 months before taking leave;* and
- Work at a location where the employer has at least 50 employees within 75 miles of the employee's worksite.

*Special "hours of service" requirements apply to airline flight crew employees.

REQUESTING LEAVE

Generally, employees must give 30-days' advance notice of the need for FMLA leave. If it is not possible to give 30-days' notice, an employee must notify the employer as soon as possible and, generally, follow the employer's usual procedures.

Employees do not have to share a medical diagnosis, but must provide enough information to the employer so it can determine if the leave qualifies for FMLA protection. Sufficient information could include informing an employer that the employee is or will be unable to perform his or her job functions, that a family member cannot perform daily activities, or that hospitalization or continuing medical treatment is necessary. Employees must inform the employer if the need for leave is for a reason for which FMLA leave was previously taken or certified.

Employers can require a certification or periodic recertification supporting the need for leave. If the employer determines that the certification is incomplete, it must provide a written notice indicating what additional information is required.

EMPLOYER RESPONSIBILITIES

Once an employer becomes aware that an employee's need for leave is for a reason that may qualify under the FMLA, the employer must notify the employee if he or she is eligible for FMLA leave and, if eligible, must also provide a notice of rights and responsibilities under the FMLA. If the employee is not eligible, the employer must provide a reason for ineligibility.

Employers must notify its employees if leave will be designated as FMLA leave, and if so, how much leave will be designated as FMLA leave.

ENFORCEMENT

Employees may file a complaint with the U.S. Department of Labor, Wage and Hour Division, or may bring a private lawsuit against an employer.

The FMLA does not affect any federal or state law prohibiting discrimination or supersede any state or local law or collective bargaining agreement that provides greater family or medical leave rights.



For additional information or to file a complaint:

1-866-4-USWAGE

(1-866-487-9243) TTY: 1-877-889-5627

www.dol.gov/whd

U.S. Department of Labor | Wage and Hour Division



WH1420 REV 04/16

AGENDA ITEM SUMMARY

MEETING DATE: May 22, 2024

ITEM NUMBER: 3D

FROM: Executive Director

SUBJECT: Salary Compensation Study

RECOMMENDATION: Receive Salary Compensation Study

BACKGROUND SUMMARY:

The Housing Authority's Personnel Policies state that the Agency endeavors to conduct a compensation study at least every five (5) years, the results of which will be made available to all employees, presented to the Board of Commissioners, and will be advisory to the Executive Director and the Commissioners.

The Housing Authority's most recent Salary Study was finalized in September 2020. Due to rapid increases in cost of living and challenges in recruiting and retaining staff in recent years, alongside a commitment to maintaining competitive salaries aligned with market standards, the Agency proactively conducted a compensation study one year ahead of schedule. The comprehensive Base Salary Compensation Study, conducted by Koff & Associates, was completed and received on March 7, 2024.

For the positions noted in the final report the study generated a comparison between our current top monthly salary and the adjusted median top salary of comparator agencies ("market median"). Comparator agencies were selected based on numerous factors including geographic proximity and similarity of mission and operations, with input provided by Housing Authority Management and Koff. The salary study analyzed salaries only, and did not consider total compensation including benefits. However, the comparator agencies selected are all public agencies and municipalities, with similar levels of benefits, and all participate in CalPERS. The salary study considered differences in costs of labor associated with geographic location. More detail about the methodology can be found in the attached report.

The summary findings of the report noted that the Housing Authority's base salaries, overall, in comparison to the market median are 4.8% below the market. Appendix IV of the base salary compensation study illustrates the proposed salary range placements for each classification based on market data as well as the internal relationship analysis.

Information about the staff recommendation for implementing the results of this study are included in the Agency Budget staff report.

RECOMMENDATION: Receive Salary Compensation Study

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ



Koff & Associates
A Gallagher Company

March 7, 2024

Base Salary Compensation Study Final Report

Housing Authority of the County of Santa Cruz

KOFF & ASSOCIATES, a Gallagher Company

Katie Kaneko

Managing Director

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Tel: 510.658.5633

Fax: 510.652.5633



Koff & Associates
A Gallagher Company

March 7, 2024

Kathleen Kiyabu
Administrative Services Director
Housing Authority of the County of Santa Cruz
2160 41st Avenue
Capitola, CA 95010

Dear Kathleen,

Koff & Associates, a Gallagher company, is pleased to present the base Compensation Study Final Report to the Housing Authority of the County of Santa Cruz. This report documents the market compensation survey methodology, findings, and recommendations for implementation.

We would like to thank you and Aaron Pomeroy for your assistance and cooperation without which this study could not have been brought to its successful completion.

We will be glad to answer any questions or clarify any points as you are implementing the findings and recommendations. It was a pleasure working with the Housing Authority of the County of Santa Cruz and we look forward to future opportunities to provide you with professional assistance.

Very truly yours,

Katie Kaneko
Managing Director, Compensation and Rewards Consulting



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APPENDICES

Appendix I: Results Summary

Appendix II: Market Compensation Findings

Appendix III: Proposed Salary Range Schedule

Appendix IV: Salary Range Placement Recommendations



EXECUTIVE SUMMARY

Background

In June 2023, Koff & Associates (“K&A”) conducted a Compensation Study for the Housing Authority of the County of Santa Cruz (Housing Authority). All compensation findings and recommendations are presented in this report.

This compensation review process was precipitated by:

- The concern of the Board of Directors and management that employees should be recognized for the level and scope of work performed and that they are paid on a fair and competitive basis that allows the Housing Authority to recruit and retain a high-quality staff;
- The desire to have a compensation plan that can meet the needs of the Housing Authority; and
- The desire to ensure that internal relationships of salaries are based upon objective, non-quantitative evaluation factors, resulting in equity across the Housing Authority.

The goals of the compensation study are to assist the Housing Authority in developing a competitive pay and benefit plan, which is based upon market data, and to ensure that the plan is fiscally responsible and meets the needs of the Housing Authority with regards to recruitment and retention of qualified staff.

Summary of Findings

This report summarizes the study methodology, analytical tools, and the base salary survey findings. The results showed:

- The Housing Authority’s **base salaries, overall, in comparison to the market median are 4.8% below the market.**

K&A considers a classification falling within 5% of the median to be competitive.

STUDY PROCESS

Benchmark Classifications

The study included 44 classifications, and of those 27 classifications were selected in order to collect salary data within the defined labor market. Classifications that we would expect to provide a sufficient sample for analysis were selected as “benchmarks” to use as the basis to build the compensation plan. Benchmark classifications are those classifications that are compared to the market, and these classifications are used as a means of anchoring the Housing Authority’s overall compensation plan to the market. Other classifications not surveyed will be included in the compensation plan and aligned to the benchmark classifications using internal equity principles. The benchmark classifications are listed in Table 1.



Table 1. Benchmark Classification

Classification Title	
1. Accountant	2. Accounting Specialist (was Sr Acct Tech)
3. Administrative Analyst	4. Administrative Clerk II
5. Administrative Clerk III	6. Administrative Services Director
7. Administrative Services Supervisor	8. Assistant Finance Director
9. Client Services Coordinator	10. Data Analyst
11. Deputy Executive Director	12. Executive Director
13. Executive Secretary	14. Facilities Manager
15. Family Self Sufficiency Coordinator	16. Finance Director
17. Housing Inspector	18. Housing Program (Specialist) Supervisor
19. Housing Program Director	20. Housing Program Specialist
21. Leasing Specialist	22. Maintenance Worker II
23. Principal Management Analyst	24. Program Integrity Specialist
25. Property Management & Client Services Director	26. Property Management Assistant Director
27. Property Management Specialist	

Comparator Agencies

Another important step in conducting a market salary study is the determination of appropriate agencies for comparison. In developing the list of potential comparator agencies, K&A first started with agencies that the Housing Authority used in the 2019 compensation study. Other agencies were then added to the potential list of comparator agencies based on the following factors:

- 1. Organizational type and structure** – It is generally recommended that agencies of a similar size and providing similar services to that of the Housing Authority be used as comparators.

When it comes to technical classes, the size of an organization is not as critical, as these classes perform fairly similar work. The difference in size of an organization becomes more important when comparing classes at the management level. The scope of work and responsibility for management becomes much larger as an organization grows. Factors such as management of a large staff, consequence of error, the political nature of the job, and its visibility all grow with larger organizations. When it is difficult to find agencies that are similarly sized, it is important to get a good balance of smaller and larger agencies.



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2. **Similarity of population, staff, and operational budgets** – These elements provide guidelines in relation to resources required (staff and funding) and available for the provision of services.
3. **Scope of services provided** – For the majority of classifications, it is important to select agencies providing similar services. Organizations providing the same services are ideal for comparators and most comparator agencies surveyed provide similar services to the Housing Authority.
4. **Labor market and geographic location** – Today’s labor market reality is that many agencies are in competition for the same pool of qualified employees because large portions of the workforce don’t live in the communities they serve, are accustomed to lengthy commutes, and are more likely to consider changing jobs in a larger geographic area than in the past. Furthermore, by selecting employers within a geographic proximity to the Housing Authority, the resulting labor market data generally reflects the region’s cost of living, housing costs, growth rate, and other demographic characteristics to the same extent as competing employers to the Housing Authority. Therefore, the geographic labor market area where the Housing Authority may be recruiting from or losing employees to, was taken into consideration when selecting comparator organizations.

All factors mentioned should be considered in selecting the group of comparator agencies. The Housing Authority agreed to a list of eleven (11) agencies.

Table 2. Comparator Agencies

Agency	
1. City of Santa Cruz	2. City of Watsonville
3. County of Santa Cruz	4. Housing Authority of the City of Alameda
5. Housing Authority of the County of Alameda	6. Housing Authority of the City of Oakland
7. Housing Authority of the City of San Luis Obispo	8. Housing Authority of the County of Contra Costa
9. Housing Authority of the County of San Mateo	10. Housing Authority of the County of Santa Barbara
11. Housing Authority of the County of Santa Clara	

Cost of Labor Differential

Use of a broader geographic survey group, as was done in this study by the inclusion of agencies throughout the state of California, generally raises questions on the impact of the cost-of-living differences and while that is a factor for survey agency selection, it is not the most appropriate method to measure regional differences in wages. Cost of Living focuses on the difference in the cost of consumer goods including housing and therefore can fluctuate more dramatically



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between locations. Cost of Labor measures regional differences in wage trends and is a more effective measure in drawing a comparison between salaries.

K&A lists the Cost of Labor differentials to be utilized by the Housing Authority to provide more accurate wage comparisons. To accomplish this, we used databases from the Economic Research Institute (ERI), a nationally recognized provider of data with respect to differences in the costs of living and cost of labor in cities with a population of over 10,000. The Cost of Labor percentages reflect regional differences in wages and are relevant to making compensation decisions because the focus is on what other employers are paying within the region rather than the differences in the cost of consumer goods. Appendix V provides more detailed information on the ERI’s Geographic Assessor methodology.

The cost of labor percentages are as follows:

Table 3. Cost of Labor Differential

Agency	Cost of Labor Differential
City of Santa Cruz	100.00%
City of Watsonville	100.00%
County of Santa Cruz	100.00%
Housing Authority City of Alameda	110.60%
Housing Authority City of Oakland	110.40%
Housing Authority Contra Costa County	110.00%
Housing Authority County of Alameda	110.60%
Housing Authority County of San Mateo	116.10%
Housing Authority County of Santa Barbara	99.00%
Housing Authority County of Santa Clara	115.50%
Housing Authority of San Luis Obispo	95.80%

For those agencies having a higher or lower cost of labor than the Santa Cruz region, salaries were adjusted by the differential percentages in order to ensure parity with the Housing Authority.

Salary Data

The last element requiring discussion prior to beginning a market survey is the specific data that will be collected and analyzed. For a base salary compensation study, the top of the salary range and/or control point was collected for each benchmark classification. All figures are presented on a monthly basis.

Data Collection

Data was collected during the months of October and November 2023, through comparator agency websites, conversations with human resources, accounting, and/or finance personnel,



and careful review of agency documentation such as classification descriptions, memoranda of understanding, organization charts, and other documents.

Matching Methodology

K&A believes that the data collection step is the most critical for maintaining the overall credibility of any study and relied on the Housing Authority’s classification descriptions as the foundation for comparison.

When K&A researches and collects data from the comparator agencies to identify possible matches for each of the benchmark classifications, there is an assumption that comparable matches may not be made that are 100% equivalent to the classifications at the Housing Authority. Therefore, K&A does not match based upon job titles, which can often be misleading, but rather analyze class descriptions before a comparable match is determined.

K&A’s methodology is to analyze each class description and the whole position by evaluating factors such as:

- Definition and typical job functions;
- Distinguishing characteristics;
- Level within a class series (i.e., entry, experienced, journey, specialist, lead, etc.);
- Reporting relationship structure (for example, manages through lower-level staff);
- Education and experience requirements;
- Knowledge, abilities, and skills required to perform the work;
- The scope and complexity of the work;
- Independence of action/responsibility;
- The authority delegated to make decisions and take action;
- The responsibility for the work of others, program administration, and for budget dollars;
- Problem solving/ingenuity;
- Contacts with others (both inside and outside of the organization);
- Consequences of action and decisions; and
- Working conditions.

In order for a match to be included, K&A requires that a classification’s “likeness” be at approximately 70% of the matched classification.

When an appropriate match is not identified for one classification, K&A often uses “hybrids” which can be functional or represent a span in scope of responsibility. A functional hybrid means that the job of one classification at the Housing Authority is performed by two or more classifications at a comparator agency. A “hybrid” representing a span in scope means that the comparator agency has one class that is “bigger” in scope and responsibility and one class that is “smaller,” where the Housing Authority’s class falls in the middle.

If an appropriate match could not be found, then no match was reported as a non-comparable (N/C).



Data Spreadsheets

The collected base salary compensation study data is attached to this report and represented as Appendix I Results Summary, and Appendix II Market Compensation Findings. The data in Appendix II is the Top Monthly Salary data spreadsheet for each benchmark classification.

The average (mean) and median (midpoint) of the comparator agencies is reported on the top monthly salary data spreadsheets. The position of the Housing Authority in comparison, in terms of its % above or below the comparator average and median is also reported.

The mean is the sum of the comparator agencies’ salaries divided by the number of matches. The median is the midpoint of all data with 50% of data points below and 50% of data points above.

To calculate the mean and median, K&A requires that there be a minimum of four (4) comparator agencies with matching classifications to the benchmark classification. The reason for requiring a minimum of four matches is so that no one classification has undue influence on the calculations. Sufficient data was collected from the comparator agencies for 26 of the 27 benchmark classifications.

When using survey data to make salary range recommendations and adjustments, K&A recommends using the median, rather than the mean, because the median is not skewed by extremely high or low salary values.

MARKET COMPENSATION FINDINGS

The following table represents a summary of the market top monthly (base) salary findings. For each benchmark classification, the number of matches (agencies with a comparable position) and percent above or below the top monthly salary market median is listed. The table is sorted by top monthly salary in descending order from the most positive percentile (above market) to the most negative (below market).

Table 4. Market Compensation Results Summary

Classification Title	# of Benchmark Matches	Adjusted Top Monthly % Above or Below
Property Management Specialist	6	7.2%
Accounting Specialist (was Sr Acct Tech)	11	5.5%
Client Services Coordinator	5	5.2%
Housing Program Director	10	2.7%
Property Management & Client Services Director	5	2.4%



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Classification Title	# of Benchmark Matches	Adjusted Top Monthly % Above or Below
Finance Director	9	2.1%
Program Integrity Specialist	6	1.2%
Family Self Sufficiency Coordinator	7	0.8%
Leasing Specialist	7	0.8%
Principal Management Analyst	6	0.7%
Deputy Executive Director	8	-1.6%
Accountant	9	-3.7%
Housing Inspector	8	-4.5%
Administrative Clerk II	11	-5.2%
Administrative Clerk III	11	-5.3%
Administrative Services Director	4	-5.7%
Maintenance Worker II	10	-6.4%
Administrative Analyst	9	-8.1%
Housing Program Specialist	9	-9.5%
Executive Secretary	9	-13.6%
Administrative Services Supervisor	5	-13.8%
Housing Program (Specialist) Supervisor	8	-14.4%
Data Analyst	6	-14.6%
Facilities Manager	11	-15.1%
Assistant Finance Director	9	-15.8%
Executive Director	8	-16.1%
Property Management Assistant Director	3	Insufficient Data

Base Salary

The base salary market results found that 16 classifications are paid below the market median.



Base Salary Compensation Study – Final Report Housing Authority of the County of Santa Cruz

# of Classifications	< -5%	-5 to -10%	-10 to -15%	-15+%	Total Below
<i>Below the Market Median</i>	3	6	4	3	16

Base salary market results found that 10 classifications are paid above the market median.

# of Classifications	< 5%	5 to 10%	10 to 15%	15+%	Total Above
<i>Above the Market Median</i>	7	3	0	0	10

One of the 27 classifications could not be calculated as there were not enough comparator agencies with matching classifications.

There were 10 classifications found to be paid within 5% above/below the market median. Generally, a classification falling within 5% of the median is considered to be competitive in the labor market for salary survey purposes considering the differences in compensation policy, actual scope of work, and position requirements. The Housing Authority can adopt a different standard, however.

INTERNAL SALARY RELATIONSHIPS

Building from the salary levels established for identified benchmark classes, internal salary relationships were developed and consistently applied in order to develop specific salary recommendations for all non-benchmarked classifications.

In the future, the Housing Authority may need to utilize internal alignment practices if the number of staff grows, and additional classifications are added or classifications change. While analyzing internal relationships, the same factors analyzed when comparing the Housing Authority’s classifications to the labor market are used when making internal salary alignment recommendations.

In addition, the following are standard human resources practices that are commonly applied when making salary recommendations based upon internal relationships:

- A salary within 5% of the market average or median is considered to be competitive in the labor market for salary survey purposes because of the differences in compensation policy and actual scope of the position and its requirements. However, the Housing Authority can adopt another standard.
- Certain internal percentages are often applied. Those that are the most common are:
 - The differential between a trainee and experienced (or journey) class in a series (I/II or Trainee/Experienced) is generally 10% to 15%;
 - A lead or advanced journey-level (III or Senior-level) class is generally placed 10% to 15% above the journey-level.
 - A full supervisory class is normally placed at least 10% to 25% above the highest level supervised, depending upon the breadth and scope of supervision.
- When a market or internal equity adjustment is granted to one class in a series, the other classes in the series are also adjusted accordingly to maintain internal equity.



Internal equity between certain levels of classifications is a fundamental factor to be considered when making salary decisions. When conducting a market compensation survey, results can often show that certain classifications aligned with each other are not found to be paid the same in the outside labor market. However, as an organization, careful consideration should be given to these alignments because they represent internal value of classifications within job families, as well as across the organization.

For the purposes of this study, K&A generally utilized market data to develop the salary recommendations and applied internal equity principles to internally align classifications to reflect the organizational operations and alignment. For the non-benchmarked classifications, internal alignments with other classifications will need to be considered – either in the same class series or those classifications that have similar scope of work, level of responsibility, and “worth” to the Housing Authority. Where it is difficult to ascertain internal relationships due to unique qualifications and responsibilities, reliance can be placed on past internal relationships. It is important for Housing Authority management to carefully review these internal relationships and determine if they are still appropriate given the current market data.

It is also important to analyze market data and internal relationships within class series as well as across the organization, and make adjustments to salary range placements, as necessary, based on the needs of the organization.

The Housing Authority may want to make internal equity adjustments or alignments, as it implements the compensation strategy. This market survey is only a tool to be used by the Housing Authority to determine market indexing and salary determination.

RECOMMENDATIONS

Pay Philosophy

The Housing Authority of the County of Santa Cruz has many options regarding what type of compensation plan it wants to implement. This decision will be based on what the agency's pay philosophy is, at which level it desires to pay its employees compared to the market, whether it is going to consider additional alternative compensation programs, and how great the competition is with other agencies over recruitment of a highly-qualified workforce.

Proposed Salary Structure

Currently, the Housing Authority has a salary structure with salary ranges that are approximately 2.5% apart from one another. Each salary range has five pay steps with 5% between each step. It is recommended that the Housing Authority maintain a similar salary structure. Appendix III contains the current salary range structure.

It is important to note that the salary range structure connects all salary ranges, and their steps, by formula, thereby allowing for cost-of-living adjustments (COLAs) to be applied to only one-dollar figure in the table/matrix, which then automatically updates the entire table. Due to the formula that connects each range to the next (with 2.5% differentials between each range), there is a compounding effect when drawing relationships that span several ranges. For example, with



2.5% differentials between ranges, four ranges should represent a 10% differential. However, because the compounding effect of 2.5%, on top of 2.5%, on top of 2.5%, and so on, the differential between Range 1 and Range 5 is not exactly 10%, but it is slightly greater.

Proposed Salary Range Placements

Appendix IV illustrates the proposed salary range placement for each classification based on the market data as well as the internal relationship analysis. The recommendations are based on adjusted base salary market results. Classifications were placed within the salary range with a Step 5 salary closest to the Market Placement Salary. K&A also modified the current internal alignment in certain instances where it seemed warranted based on market-supported groupings and/or compaction issues.

For all classifications, this primary implementation procedure must be completed only at the initial time of implementation. In the future, if the Housing Authority decides to implement annual across-the-board COLA increases, only the salary schedule that was developed and included herein needs to be increased by the appropriate percentage, and each individual salary range will move up with this adjustment. This will ensure that the internal salary relationships are preserved, and the salary schedule remains structured and easily administered.

Options for Implementation

While the Housing Authority may be interested in bringing all salaries to the market median, this goal may not be reached with a single adjustment. In this case, one option is to move employees into the salary range that is recommended for each class based on this market study and to the step within the new range that is closest to their current compensation. If employees’ current salaries are significantly below market so that their current compensation falls below the bottom of the newly recommended range, then larger adjustments would be needed to move those employees at least to the bottom of the new salary range.

Another option is to use a phased implementation approach. Normally, if the compensation implementation program must be carried over months or years, the classes that are farthest from the market median should receive the greatest equity increase (separate from any cost-of-living increase). If a class falls within 5% of the market median, it would be logical to make no equity adjustment in the first round of changes. However, if a class is more than 5% below the market median, a higher percentage change may be initially warranted to reduce the disparity.

For example, if the Housing Authority decided to implement the recommendations over a three-year period, then the following guidelines could be applied for the initial increase of the three-year implementation plan:

Table 5. Three-Year Implementation Proposal

Market Disparity	% Increase
0 to 4.99%	0 to 2.49%
5.0% to 9.99%	2.5% to 4.99%



Base Salary Compensation Study – Final Report Housing Authority of the County of Santa Cruz

Market Disparity	% Increase
10.0% to 14.99%	5.0% to 7.49%
15.0% to 19.99%	7.5% to 9.99%

The initial first year adjustment would provide a portion of the equity increase and place the class into the closest step (but not below) where they are now. Subsequent increases would be spaced on a similar schedule (at annual intervals) based upon the remaining disparity after each adjustment.

Please note that typically, for those classes that had a market disparity of 0 to 4.99%, we recommend a 0% increase in the first year and an adjustment in the second year. Depending upon the Housing Authority’s financial situation, which will have to be reviewed before each further adjustment is made, all market disparity adjustments are intended to be completed by the third year. The Housing Authority may also consider a similar implementation plan over a longer period of time, like a five-year implementation plan.

The Housing Authority may spend additional time to go through a process of deliberation and decision-making as to what compensation philosophy it should implement to attract, motivate, and retain a high-quality workforce. However, the Housing Authority may want to consider adjusting those classifications’ salaries that are currently below the market median as soon as possible, assuming that incumbents’ performance meets the Housing Authority’s level of expectation.

When classifications are over market, K&A typically recommends Y-rating employees whose current pay exceeds the maximum of the recommended range until the market numbers “catch up” with their current salary. To Y-rate an employee means to keep the employee’s salary frozen and to provide no salary increases (including no cost-of-living adjustments) until the employee’s current salary is within the recommended salary range. This will result in no immediate loss of income but will delay any future increases until the incumbent’s salary is within the salary range.

Other options to Y-rating or “freezing” a classification’s salary in place until the market catches up are:

- **“Grandfathering” of salary ranges:** This means that the salary range for the classification is adjusted down to what the market numbers are. However, current incumbents would continue being paid at the current rate of pay and remain in the old range (which would put them outside of the new and adjusted salary range for the class) until they separate from employment with the Housing Authority. Any new-hires would be paid within the newly established salary range.
- **Single-incumbent classes:** If a class only has one incumbent, an option would be to wait until the person separates from employment with the Housing Authority and then adjust the salary range for the class according to the market.
- **Recent hires:** Some employees who have recently been hired may still be at one of the lower steps within their current salary range. So, even if the top of their current salary range is above market, the incumbents are currently still paid below the market maximum



Base Salary Compensation Study – Final Report Housing Authority of the County of Santa Cruz

because they are not at the top of their current salary range. In this case, an immediate salary range adjustment could be made to bring the salary range within the market. This could bring the affected incumbents either to the top of the market range or very close to it, but they would not technically be Y-rated or lose any pay.

Another option, of course, is to actually reduce salaries down to the market. However, from an employee relations perspective this may not be a viable option.

USING THE MARKET DATA AS A TOOL

K&A would like to reiterate that this report and the findings are meant to be a tool for the Housing Authority to create and implement an equitable compensation plan. Compensation strategies are designed to attract and retain excellent staff; however, financial realities and the Housing Authority's expectations may also come into play when determining appropriate compensation philosophies and strategies. The collected data presented herein represents a market survey that will give the Housing Authority an instrument to make future compensation decisions.

It has been a pleasure working with the Housing Authority of the County of Santa Cruz on this critical project. Please do not hesitate to contact us if we can provide any additional information or clarification regarding this report.

Respectfully submitted by,
Koff & Associates

A handwritten signature in purple ink, appearing to read 'Katie Kaneko'.

Katie Kaneko
Managing Director, Compensation and Rewards Consulting



Appendix I

Results Summary

**Housing Authority County of Santa Cruz
Results Summary
November 2023**

Classification	Unadjusted Top Monthly Salary					Adjusted Top Monthly Salary					# of Matches
	Top Monthly Salary	Average of Comparators	% above or below	Median of Comparators	% above or below	Top Monthly Salary	Adjusted Average of Comparators	% above or below	Adjusted Median of Comparators	% above or below	
Accountant	\$ 7,976	\$ 9,372	-17.5%	\$ 9,000	-12.8%	\$ 7,976	\$ 8,764	-9.9%	\$ 8,270	-3.7%	9
Accounting Specialist (was Sr Acct Tech)	\$ 6,710	\$ 6,711	-0.0%	\$ 6,597	1.7%	\$ 6,710	\$ 6,349	5.4%	\$ 6,338	5.5%	11
Administrative Analyst	\$ 8,804	\$ 10,115	-14.9%	\$ 10,527	-19.6%	\$ 8,804	\$ 9,331	-6.0%	\$ 9,518	-8.1%	9
Administrative Clerk II	\$ 4,749	\$ 5,374	-13.2%	\$ 5,185	-9.2%	\$ 4,749	\$ 5,059	-6.5%	\$ 4,994	-5.2%	11
Administrative Clerk III	\$ 5,242	\$ 5,897	-12.5%	\$ 5,740	-9.5%	\$ 5,242	\$ 5,544	-5.8%	\$ 5,518	-5.3%	11
Administrative Services Director	\$ 13,732	\$ 16,575	-20.7%	\$ 16,388	-19.3%	\$ 13,732	\$ 14,884	-8.4%	\$ 14,517	-5.7%	4
Administrative Services Supervisor	\$ 8,176	\$ 9,471	-15.8%	\$ 9,012	-10.2%	\$ 8,176	\$ 9,035	-10.5%	\$ 9,307	-13.8%	5
Assistant Finance Director	\$ 11,552	\$ 13,677	-18.4%	\$ 13,382	-15.8%	\$ 11,552	\$ 12,690	-9.9%	\$ 13,382	-15.8%	9
Client Services Coordinator	\$ 6,547	\$ 6,573	-0.4%	\$ 6,146	6.1%	\$ 6,547	\$ 6,492	0.8%	\$ 6,208	5.2%	5
Data Analyst	\$ 8,804	\$ 10,773	-22.4%	\$ 10,595	-20.3%	\$ 8,804	\$ 10,028	-13.9%	\$ 10,090	-14.6%	6
Deputy Executive Director	\$ 17,149	\$ 19,218	-12.1%	\$ 17,712	-3.3%	\$ 17,149	\$ 17,860	-4.1%	\$ 17,422	-1.6%	8
Executive Director	\$ 20,894	\$ 26,147	-25.1%	\$ 23,840	-14.1%	\$ 20,894	\$ 24,093	-15.3%	\$ 24,253	-16.1%	8
Executive Secretary	\$ 6,878	\$ 8,082	-17.5%	\$ 7,732	-12.4%	\$ 6,878	\$ 7,638	-11.1%	\$ 7,810	-13.6%	9
Facilities Manager	\$ 8,804	\$ 11,076	-25.8%	\$ 10,518	-19.5%	\$ 8,804	\$ 10,373	-17.8%	\$ 10,132	-15.1%	11
Family Self Sufficiency Coordinator	\$ 6,079	\$ 6,888	-13.3%	\$ 6,539	-7.6%	\$ 6,079	\$ 6,487	-6.7%	\$ 6,031	0.8%	7
Finance Director	\$ 15,157	\$ 17,068	-12.6%	\$ 16,309	-7.6%	\$ 15,157	\$ 15,853	-4.6%	\$ 14,845	2.1%	9
Housing Inspector	\$ 6,231	\$ 7,439	-19.4%	\$ 7,149	-14.7%	\$ 6,231	\$ 6,834	-9.7%	\$ 6,510	-4.5%	8
Housing Program (Specialist) Supervisor	\$ 8,176	\$ 9,963	-21.9%	\$ 9,909	-21.2%	\$ 8,176	\$ 9,176	-12.2%	\$ 9,357	-14.4%	8
Housing Program Director	\$ 13,732	\$ 14,739	-7.3%	\$ 14,019	-2.1%	\$ 13,732	\$ 13,743	-0.1%	\$ 13,364	2.7%	10
Housing Program Specialist	\$ 6,079	\$ 7,143	-17.5%	\$ 7,227	-18.9%	\$ 6,079	\$ 6,653	-9.4%	\$ 6,659	-9.5%	9
Leasing Specialist	\$ 6,547	\$ 7,232	-10.5%	\$ 6,955	-6.2%	\$ 6,547	\$ 6,720	-2.6%	\$ 6,496	0.8%	7
Maintenance Worker II	\$ 5,931	\$ 6,731	-13.5%	\$ 6,732	-13.5%	\$ 5,931	\$ 6,389	-7.7%	\$ 6,312	-6.4%	10
Principal Management Analyst	\$ 11,270	\$ 13,031	-15.6%	\$ 12,600	-11.8%	\$ 11,270	\$ 11,994	-6.4%	\$ 11,192	0.7%	6
Program Integrity Specialist	\$ 7,592	\$ 8,273	-9.0%	\$ 8,396	-10.6%	\$ 7,592	\$ 7,667	-1.0%	\$ 7,502	1.2%	6
Property Management & Client Services Director	\$ 13,732	\$ 14,814	-7.9%	\$ 13,272	3.3%	\$ 13,732	\$ 14,046	-2.3%	\$ 13,406	2.4%	5
Property Management Assistant Director	\$ 10,210	Insuff. Data	Insuff. Data	Insuff. Data	Insuff. Data	\$ 10,210	Insuff. Data	Insuff. Data	Insuff. Data	Insuff. Data	3
Property Management Specialist	\$ 6,547	\$ 6,665	-1.8%	\$ 6,397	2.3%	\$ 6,547	\$ 6,224	4.9%	\$ 6,075	7.2%	6
		AVERAGE:	-14.1%	AVERAGE:	-10.3%		AVERAGE:	-6.6%	AVERAGE:	-4.8%	



Appendix II

Market Compensation Findings

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Accountant								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Oakland	Accounting Officer III	\$ 13,152	110.40%	\$ 11,913	7/1/2023	unknown	unknown
2	Housing Authority County of Alameda	Accountant	\$ 10,527	110.60%	\$ 9,518	6/30/2023	unknown	unknown
3	City of Santa Cruz	Accountant II	\$ 9,330	100.00%	\$ 9,330	8/19/2023	8/17/2024	5.00%
4	Housing Authority City of Alameda ¹	Accounting Specialist II	\$ 9,391	110.60%	\$ 8,491	10/23/2022	unknown	unknown
5	City of Watsonville	Accountant II	\$ 8,270	100.00%	\$ 8,270	7/9/2022	unknown	unknown
6	Housing Authority County of Santa Barbara	Staff Accountant I	\$ 8,047	99.00%	\$ 8,128	12/23/2022	unknown	unknown
7	County of Santa Cruz	Accountant II	\$ 8,039	100.00%	\$ 8,039	9/1/2023	unknown	unknown
8	Housing Authority County of Santa Cruz	Accountant	\$ 7,976	100.00%	\$ 7,976	7/2/2023	unknown	unknown
9	Housing Authority County of San Mateo	Accountant II	\$ 9,000	116.10%	\$ 7,752	10/1/2023	unknown	unknown
10	Housing Authority County of Santa Clara	Accountant I	\$ 8,590	115.50%	\$ 7,437	8/5/2023	unknown	unknown
11	Housing Authority Contra Costa County	N/C						
12	Housing Authority of San Luis Obispo	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 9,372	\$ 8,764
% Housing Authority County of Santa Cruz Above/Below	-17.5%	-9.9%
Median of Comparators	\$ 9,000	\$ 8,270
% Housing Authority County of Santa Cruz Above/Below	-12.8%	-3.7%
Number of Matches	9	9

N/C - Non Comparator

1 - Housing Authority City of Alameda: Salary schedule indicates a 37.5 hour work week for this non-exempt classification; Top Monthly Salary has been adjusted for 40 hour work week.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Accounting Specialist (was Sr Acct Tech)								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda ³	Accounting Specialist I	\$ 8,518	110.60%	\$ 7,702	10/23/2022	unknown	unknown
2	Housing Authority County of Santa Barbara	Accounting Technician II	\$ 7,391	99.00%	\$ 7,465	12/23/2022	unknown	unknown
3	County of Santa Cruz ²	[Senior Accounting Technician/ Payroll Clerk]	\$ 7,438	100.00%	\$ 7,438	9/1/2023	unknown	unknown
4	Housing Authority County of Santa Cruz	Accounting Specialist (was Sr Acct Tech)	\$ 6,710	100.00%	\$ 6,710	7/2/2023	unknown	unknown
5	City of Santa Cruz ¹	[Accounting Technician/ Payroll Technician]	\$ 6,597	100.00%	\$ 6,597	9/2/2023	8/31/2024	3.50%
6	City of Watsonville	Accounting Technician	\$ 6,570	100.00%	\$ 6,570	3/15/2023	1/1/2024	3.00%
7	Housing Authority of San Luis Obispo	Accounting & Payroll Specialist	\$ 6,072	95.80%	\$ 6,338	10/1/2023	unknown	unknown
8	Housing Authority County of Santa Clara	Payroll Specialist	\$ 7,050	115.50%	\$ 6,104	8/5/2023	unknown	unknown
9	Housing Authority County of San Mateo ⁴	[Fiscal Office Specialist/ Payroll-Personnel Coordinator II]	\$ 6,699	116.10%	\$ 5,770	10/1/2023	unknown	unknown
10	Housing Authority City of Oakland	Accounting Specialist II	\$ 6,104	110.40%	\$ 5,529	7/1/2023	unknown	unknown
11	Housing Authority Contra Costa County	Senior Accounts Clerk	\$ 5,887	110.00%	\$ 5,352	6/24/2023	unknown	unknown
12	Housing Authority County of Alameda	Account Specialist	\$ 5,497	110.60%	\$ 4,970	6/10/2023	6/8/2024	4.00%

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 6,711	\$ 6,349
% Housing Authority County of Santa Cruz Above/Below	-0.0%	5.4%
Median of Comparators	\$ 6,597	\$ 6,338
% Housing Authority County of Santa Cruz Above/Below	1.7%	5.5%
Number of Matches	11	11

N/C - Non Comparator

- 1 - City of Santa Cruz: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.
- 2 - County of Santa Cruz: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.
- 3 - Housing Authority City of Alameda: Salary schedule indicates a 37.5 hour work week for this non-exempt classification; Top Monthly Salary has been adjusted for 40 hour work week.
- 4 - Housing Authority County of San Mateo: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Administrative Analyst								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority County of San Mateo	Program Compliance Officer	\$ 12,102	116.10%	\$ 10,424	10/1/2023	unknown	unknown
2	Housing Authority City of Alameda	Management Analyst	\$ 11,237	110.60%	\$ 10,160	8/28/2022	unknown	unknown
3	Housing Authority City of Oakland	Administrative Analyst	\$ 10,983	110.40%	\$ 9,948	7/1/2023	unknown	unknown
4	County of Santa Cruz	Associate Administrative Analyst	\$ 9,731	100.00%	\$ 9,731	9/16/2023	unknown	unknown
5	Housing Authority County of Alameda	Administrative Analyst II	\$ 10,527	110.60%	\$ 9,518	6/30/2023	unknown	unknown
6	Housing Authority County of Santa Clara	Management Analyst	\$ 10,728	115.50%	\$ 9,288	8/5/2023	unknown	unknown
7	City of Santa Cruz	Management Analyst	\$ 9,044	100.00%	\$ 9,044	8/19/2023	8/17/2024	5.00%
8	Housing Authority County of Santa Cruz	Administrative Analyst	\$ 8,804	100.00%	\$ 8,804	7/2/2023	unknown	unknown
9	Housing Authority Contra Costa County	Program Analyst	\$ 8,913	110.00%	\$ 8,103	6/24/2023	unknown	unknown
10	City of Watsonville	Administrative Analyst	\$ 7,766	100.00%	\$ 7,766	7/9/2022	unknown	unknown
11	Housing Authority County of Santa Barbara	N/C						
12	Housing Authority of San Luis Obispo	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 10,115	\$ 9,331
% Housing Authority County of Santa Cruz Above/Below	-14.9%	-6.0%
Median of Comparators	\$ 10,527	\$ 9,518
% Housing Authority County of Santa Cruz Above/Below	-19.6%	-8.1%
Number of Matches	9	9

N/C - Non Comparator

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Administrative Clerk II								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda ¹	Housing Assistant	\$ 6,836	110.60%	\$ 6,181	8/28/2022	unknown	unknown
2	Housing Authority City of Oakland	Office Specialist II	\$ 5,907	110.40%	\$ 5,350	7/1/2023	unknown	unknown
3	City of Santa Cruz	Administrative Assistant II	\$ 5,185	100.00%	\$ 5,185	9/2/2023	8/17/2024	3.50%
4	Housing Authority County of Santa Barbara	Housing Clerk II	\$ 5,115	99.00%	\$ 5,166	12/23/2022	unknown	unknown
5	County of Santa Cruz	Office Assistant II	\$ 5,020	100.00%	\$ 5,020	9/1/2023	unknown	unknown
6	Housing Authority County of San Mateo	Office Assistant II	\$ 5,798	116.10%	\$ 4,994	10/1/2023	unknown	unknown
7	City of Watsonville	Office Assistant II	\$ 4,918	100.00%	\$ 4,918	3/15/2023	1/1/2024	3.00%
8	Housing Authority County of Santa Clara	Office Assistant	\$ 5,645	115.50%	\$ 4,888	8/5/2023	unknown	unknown
9	Housing Authority of San Luis Obispo	Housing Assistant II	\$ 4,627	95.80%	\$ 4,830	10/1/2023	unknown	unknown
10	Housing Authority County of Santa Cruz	Administrative Clerk II	\$ 4,749	100.00%	\$ 4,749	7/2/2023	unknown	unknown
11	Housing Authority County of Alameda	Administrative Clerk	\$ 5,239	110.60%	\$ 4,737	6/10/2023	6/8/2024	4.00%
12	Housing Authority Contra Costa County	Office Assistant II	\$ 4,823	110.00%	\$ 4,385	6/24/2023	unknown	unknown

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 5,374	\$ 5,059
% Housing Authority County of Santa Cruz Above/Below	-13.2%	-6.5%
Median of Comparators	\$ 5,185	\$ 4,994
% Housing Authority County of Santa Cruz Above/Below	-9.2%	-5.2%
Number of Matches	11	11

N/C - Non Comparator

1 - Housing Authority City of Alameda: Salary schedule indicates a 37.5 hour work week for this non-exempt classification; Top Monthly Salary has been adjusted for 40 hour work week.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Administrative Clerk III								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda ¹	Program Assistant	\$ 7,726	110.60%	\$ 6,985	10/23/2022	unknown	unknown
2	City of Santa Cruz	Administrative Assistant III	\$ 6,119	100.00%	\$ 6,119	9/2/2023	8/31/2024	3.50%
3	Housing Authority City of Oakland	Lead Office Specialist	\$ 6,689	110.40%	\$ 6,059	7/1/2023	unknown	unknown
4	Housing Authority County of Santa Clara	Housing Assistant	\$ 6,547	115.50%	\$ 5,668	8/5/2023	unknown	unknown
5	County of Santa Cruz	Office Assistant III	\$ 5,550	100.00%	\$ 5,550	9/1/2023	unknown	unknown
6	Housing Authority County of San Mateo	Office Specialist	\$ 6,407	116.10%	\$ 5,518	10/1/2023	unknown	unknown
7	Housing Authority County of Santa Cruz	Administrative Clerk III	\$ 5,242	100.00%	\$ 5,242	7/2/2023	unknown	unknown
8	Housing Authority County of Alameda	Housing Technician	\$ 5,740	110.60%	\$ 5,190	6/10/2023	6/8/2024	4.00%
9	Housing Authority County of Santa Barbara	Resident Services Clerk	\$ 5,115	99.00%	\$ 5,166	12/23/2022	unknown	unknown
10	Housing Authority of San Luis Obispo	Housing Assistant III	\$ 4,861	95.80%	\$ 5,074	10/1/2023	unknown	unknown
11	City of Watsonville	Administrative Assist I	\$ 5,036	100.00%	\$ 5,036	7/9/2022	unknown	unknown
12	Housing Authority Contra Costa County	Senior Office Assistant	\$ 5,083	110.00%	\$ 4,620	6/24/2023	unknown	unknown

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 5,897	\$ 5,544
% Housing Authority County of Santa Cruz Above/Below	-12.5%	-5.8%
Median of Comparators	\$ 5,740	\$ 5,518
% Housing Authority County of Santa Cruz Above/Below	-9.5%	-5.3%
Number of Matches	11	11

N/C - Non Comparator

1 - Housing Authority City of Alameda: Salary schedule indicates a 37.5 hour work week for this non-exempt classification; Top Monthly Salary has been adjusted for 40 hour work week.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Administrative Services Director								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority County of Santa Clara	Director of Administrative Services	\$ 22,503	115.50%	\$ 19,483	8/5/2023	unknown	unknown
2	Housing Authority City of Alameda	Director of Administrative Services	\$ 18,749	110.60%	\$ 16,952	7/30/2023	unknown	unknown
3	Housing Authority County of Santa Cruz	Administrative Services Director	\$ 13,732	100.00%	\$ 13,732	7/2/2023	unknown	unknown
4	Housing Authority County of San Mateo ¹	[Administrative Services Manager/ Human Resources Manager I]	\$ 14,027	116.10%	\$ 12,082	10/1/2023	unknown	unknown
5	County of Santa Cruz	Administrative Services Manager	\$ 11,020	100.00%	\$ 11,020	9/16/2023	9/1/2024	3.00%
6	City of Santa Cruz	N/C						
7	City of Watsonville	N/C						
8	Housing Authority City of Oakland	N/C						
9	Housing Authority Contra Costa County	N/C						
10	Housing Authority County of Alameda	N/C						
11	Housing Authority County of Santa Barbara	N/C						
12	Housing Authority of San Luis Obispo	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 16,575	\$ 14,884
% Housing Authority County of Santa Cruz Above/Below	-20.7%	-8.4%
Median of Comparators	\$ 16,388	\$ 14,517
% Housing Authority County of Santa Cruz Above/Below	-19.3%	-5.7%
Number of Matches	4	4

N/C - Non Comparator

1 - Housing Authority County of San Mateo: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Administrative Services Supervisor								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda	Housing Programs Supervisor	\$ 11,237	110.60%	\$ 10,160	8/28/2022	unknown	unknown
2	Housing Authority of San Luis Obispo	Administrative Support Manager	\$ 9,012	95.80%	\$ 9,407	10/1/2023	unknown	unknown
3	Housing Authority County of San Mateo	Housing Programs Supervisor	\$ 10,806	116.10%	\$ 9,307	10/1/2023	unknown	unknown
4	City of Santa Cruz ¹	Administrative Services Supervisor	\$ 8,897	100.00%	\$ 8,897	11/12/2023	unknown	unknown
5	Housing Authority County of Santa Cruz	Administrative Services Supervisor	\$ 8,176	100.00%	\$ 8,176	7/2/2023	unknown	unknown
6	County of Santa Cruz	Clerical Supervisor II	\$ 7,406	100.00%	\$ 7,406	9/1/2023	unknown	unknown
7	City of Watsonville	N/C						
8	Housing Authority City of Oakland	N/C						
9	Housing Authority Contra Costa County	N/C						
10	Housing Authority County of Alameda	N/C						
11	Housing Authority County of Santa Barbara	N/C						
12	Housing Authority County of Santa Clara	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 9,471	\$ 9,035
% Housing Authority County of Santa Cruz Above/Below	-15.8%	-10.5%
Median of Comparators	\$ 9,012	\$ 9,307
% Housing Authority County of Santa Cruz Above/Below	-10.2%	-13.8%
Number of Matches	5	5

N/C - Non Comparator

1 - City of Santa Cruz: New rate includes 2% COLA + new top step equiv to 5%

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Assistant Finance Director								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority County of Santa Clara	Controller	\$ 18,469	115.50%	\$ 15,991	8/5/2023	unknown	unknown
2	Housing Authority City of Alameda	Assistant Director of Finance	\$ 15,425	110.60%	\$ 13,947	3/15/2023	unknown	unknown
3	Housing Authority City of Oakland	Assistant Director of Finance Operations	\$ 15,252	110.40%	\$ 13,815	7/1/2023	unknown	unknown
4	Housing Authority County of Alameda	Financial Accounting Manager	\$ 14,874	110.60%	\$ 13,448	6/30/2023	unknown	unknown
5	City of Watsonville	Assistant Finance Director	\$ 13,382	100.00%	\$ 13,382	7/9/2022	unknown	unknown
6	Housing Authority of San Luis Obispo	Deputy Director of Finance	\$ 11,825	95.80%	\$ 12,343	10/1/2023	unknown	unknown
7	City of Santa Cruz	Finance Manager	\$ 12,096	100.00%	\$ 12,096	8/19/2023	8/17/2024	5.00%
8	Housing Authority County of Santa Cruz	Assistant Finance Director	\$ 11,552	100.00%	\$ 11,552	7/2/2023	unknown	unknown
9	Housing Authority County of San Mateo	Financial Services Manager I (San Mateo County)	\$ 12,636	116.10%	\$ 10,884	10/1/2023	unknown	unknown
10	Housing Authority Contra Costa County ¹	[Accounting Supervisor/ Internal Auditor]	\$ 9,136	110.00%	\$ 8,305	11/8/2023	unknown	unknown
11	County of Santa Cruz	N/C						
12	Housing Authority County of Santa Barbara	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 13,677	\$ 12,690
% Housing Authority County of Santa Cruz Above/Below	-18.4%	-9.9%
Median of Comparators	\$ 13,382	\$ 13,382
% Housing Authority County of Santa Cruz Above/Below	-15.8%	-15.8%
Number of Matches	9	9

N/C - Non Comparator

1 - Housing Authority Contra Costa County: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Client Services Coordinator								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	County of Santa Cruz	Program Coordinator	\$ 7,739	100.00%	\$ 7,739	9/1/2023	unknown	unknown
2	Housing Authority Contra Costa County	Resident Services Coordinator	\$ 7,697	110.00%	\$ 6,997	6/24/2023	unknown	unknown
3	Housing Authority County of Santa Cruz	Client Services Coordinator	\$ 6,547	100.00%	\$ 6,547	7/2/2023	unknown	unknown
4	Housing Authority County of Santa Barbara	Supportive Services Specialist	\$ 6,146	99.00%	\$ 6,208	12/23/2022	unknown	unknown
5	City of Watsonville	Neighborhood Outreach Coordinator	\$ 5,915	100.00%	\$ 5,915	7/9/2022	unknown	unknown
6	Housing Authority of San Luis Obispo	Supportive Housing Program Case Manager II	\$ 5,366	95.80%	\$ 5,601	10/1/2023	unknown	unknown
7	City of Santa Cruz	N/C						
8	Housing Authority City of Alameda	N/C						
9	Housing Authority City of Oakland	N/C						
10	Housing Authority County of Alameda	N/C						
11	Housing Authority County of San Mateo	N/C						
12	Housing Authority County of Santa Clara	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 6,573	\$ 6,492
% Housing Authority County of Santa Cruz Above/Below	-0.4%	0.8%
Median of Comparators	\$ 6,146	\$ 6,208
% Housing Authority County of Santa Cruz Above/Below	6.1%	5.2%
Number of Matches	5	5

N/C - Non Comparator

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Data Analyst								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority County of Santa Clara	Database Analyst	\$ 13,733	115.50%	\$ 11,890	8/5/2023	unknown	unknown
2	Housing Authority County of San Mateo	IS Data Specialist II	\$ 12,234	116.10%	\$ 10,537	10/1/2023	unknown	unknown
3	City of Watsonville ¹	[Senior Programmer Analyst/ IT Analyst II]	\$ 10,474	100.00%	\$ 10,474	3/15/2023	1/1/2024	3.00%
4	Housing Authority City of Oakland	Systems Data Analyst	\$ 10,715	110.40%	\$ 9,706	7/1/2023	unknown	unknown
5	City of Santa Cruz	Programmer Analyst II	\$ 9,586	100.00%	\$ 9,586	8/19/2023	8/17/2024	5.00%
6	Housing Authority County of Santa Cruz	Data Analyst	\$ 8,804	100.00%	\$ 8,804	7/2/2023	unknown	unknown
7	Housing Authority County of Santa Barbara ²	[Administrative Data Analyst/ Systems & Programming Analyst]	\$ 7,894	99.00%	\$ 7,973	12/23/2022	unknown	unknown
8	County of Santa Cruz	N/C						
9	Housing Authority City of Alameda	N/C						
10	Housing Authority Contra Costa County	N/C						
11	Housing Authority County of Alameda	N/C						
12	Housing Authority of San Luis Obispo	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 10,773	\$ 10,028
% Housing Authority County of Santa Cruz Above/Below	-22.4%	-13.9%
Median of Comparators	\$ 10,595	\$ 10,090
% Housing Authority County of Santa Cruz Above/Below	-20.3%	-14.6%
Number of Matches	6	6

N/C - Non Comparator

1 - City of Watsonville: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

2 - Housing Authority County of Santa Barbara: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023

Deputy Executive Director								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda	Deputy Executive Director	\$ 24,527	110.60%	\$ 22,176	7/30/2023	unknown	unknown
2	Housing Authority County of Santa Clara	Deputy Executive Director	\$ 24,233	115.50%	\$ 20,981	8/5/2023	unknown	unknown
3	Housing Authority City of Oakland	Chief Operating Officer	\$ 22,642	110.40%	\$ 20,509	7/1/2023	unknown	unknown
4	Housing Authority County of Santa Barbara	Director of Operations	\$ 17,643	99.00%	\$ 17,821	12/23/2022	unknown	unknown
5	Housing Authority County of Santa Cruz	Deputy Executive Director	\$ 17,149	100.00%	\$ 17,149	7/2/2023	unknown	unknown
6	Housing Authority of San Luis Obispo	Director of Housing Management	\$ 16,309	95.80%	\$ 17,024	10/1/2023	unknown	unknown
7	Housing Authority Contra Costa County	Deputy Executive Director for Housing Operations	\$ 17,127	110.00%	\$ 15,570	6/24/2023	unknown	unknown
8	Housing Authority County of San Mateo	Deputy Director of Housing	\$ 17,782	116.10%	\$ 15,316	10/1/2023	unknown	unknown
9	County of Santa Cruz	Housing Program Manager	\$ 13,480	100.00%	\$ 13,480	9/16/2023	9/1/2024	3.00%
10	City of Santa Cruz	N/C						
11	City of Watsonville	N/C						
12	Housing Authority County of Alameda	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 19,218	\$ 17,860
% Housing Authority County of Santa Cruz Above/Below	-12.1%	-4.1%
Median of Comparators	\$ 17,712	\$ 17,422
% Housing Authority County of Santa Cruz Above/Below	-3.3%	-1.6%
Number of Matches	8	8

N/C - Non Comparator

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Executive Director								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority County of Santa Clara	Executive Director	\$ 40,125	115.50%	\$ 34,740	8/5/2023	unknown	unknown
2	Housing Authority City of Alameda	Executive Director	\$ 30,910	110.60%	\$ 27,948	8/27/2023	unknown	unknown
3	Housing Authority of San Luis Obispo	Executive Director	\$ 24,829	95.80%	\$ 25,918	10/1/2023	unknown	unknown
4	Housing Authority City of Oakland	Executive Director	\$ 28,068	110.40%	\$ 25,424	7/1/2023	unknown	unknown
5	Housing Authority County of Santa Barbara	Executive Director	\$ 22,851	99.00%	\$ 23,082	12/23/2022	unknown	unknown
6	Housing Authority County of Santa Cruz	Executive Director	\$ 20,894	100.00%	\$ 20,894	7/2/2023	unknown	unknown
7	Housing Authority County of Alameda	Executive Director	\$ 21,543	110.60%	\$ 19,478	6/30/2023	unknown	unknown
8	Housing Authority Contra Costa County	Executive Director	\$ 20,267	110.00%	\$ 18,425	6/24/2023	unknown	unknown
9	Housing Authority County of San Mateo	Director of Housing	\$ 20,581	116.10%	\$ 17,727	10/1/2023	unknown	unknown
10	City of Santa Cruz	N/C						
11	City of Watsonville	N/C						
12	County of Santa Cruz	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 26,147	\$ 24,093
% Housing Authority County of Santa Cruz Above/Below	-25.1%	-15.3%
Median of Comparators	\$ 23,840	\$ 24,253
% Housing Authority County of Santa Cruz Above/Below	-14.1%	-16.1%
Number of Matches	8	8

N/C - Non Comparator

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Executive Secretary								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda ¹	Executive Assistant	\$ 10,101	110.60%	\$ 9,133	10/23/2022	unknown	unknown
2	Housing Authority County of San Mateo	Executive Assistant	\$ 9,465	116.10%	\$ 8,152	10/1/2023	unknown	unknown
3	Housing Authority County of Santa Clara	Executive Assistant	\$ 9,251	115.50%	\$ 8,009	8/5/2023	unknown	unknown
4	Housing Authority County of Alameda	Executive Assistant	\$ 8,640	110.60%	\$ 7,812	6/30/2023	unknown	unknown
5	Housing Authority County of Santa Barbara	Executive Assistant	\$ 7,732	99.00%	\$ 7,810	12/23/2022	unknown	unknown
6	City of Santa Cruz	Executive Assistant to the City Manager	\$ 7,287	100.00%	\$ 7,287	9/2/2023	8/31/2024	3.50%
7	County of Santa Cruz	Executive Secretary	\$ 7,231	100.00%	\$ 7,231	9/1/2023	unknown	unknown
8	Housing Authority County of Santa Cruz	Executive Secretary	\$ 6,878	100.00%	\$ 6,878	7/2/2023	unknown	unknown
9	Housing Authority of San Luis Obispo	Special Assistant to the Executive Director	\$ 6,379	95.80%	\$ 6,659	10/1/2023	unknown	unknown
10	City of Watsonville	Executive Assistant to City Manager and County Counsel	\$ 6,650	100.00%	\$ 6,650	7/9/2022	unknown	unknown
11	Housing Authority City of Oakland	N/C						
12	Housing Authority Contra Costa County	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 8,082	\$ 7,638
% Housing Authority County of Santa Cruz Above/Below	-17.5%	-11.1%
Median of Comparators	\$ 7,732	\$ 7,810
% Housing Authority County of Santa Cruz Above/Below	-12.4%	-13.6%
Number of Matches	9	9

N/C - Non Comparator

1 - Housing Authority City of Alameda: Salary schedule indicates a 37.5 hour work week for this non-exempt classification; Top Monthly Salary has been adjusted for 40 hour work week.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Facilities Manager								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority County of Santa Clara	Construction Programs Manager	\$ 15,296	115.50%	\$ 13,243	8/5/2023	unknown	unknown
2	Housing Authority County of San Mateo	Facilities Services Manager	\$ 14,633	116.10%	\$ 12,604	10/1/2023	unknown	unknown
3	Housing Authority County of Alameda	Facilities Manager	\$ 12,513	110.60%	\$ 11,314	6/30/2023	unknown	unknown
4	Housing Authority City of Alameda ⁴	[Construction Project Manager/ Property Management Supervisor]	\$ 12,085	110.60%	\$ 10,927	10/23/2022	unknown	unknown
5	County of Santa Cruz ³	[Facilities Manager/ Project Manager]	\$ 10,518	100.00%	\$ 10,518	9/16/2023	9/1/2024	3.00%
6	Housing Authority of San Luis Obispo ⁶	[Maintenance Manager/ Project Manager - Construction]	\$ 9,706	95.80%	\$ 10,132	10/1/2023	unknown	unknown
7	Housing Authority City of Oakland	Construction Projects Administrator	\$ 10,715	110.40%	\$ 9,706	7/1/2023	unknown	unknown
8	City of Santa Cruz ¹	Facilities Maintenance Supervisor	\$ 9,700	100.00%	\$ 9,700	11/12/2023	unknown	unknown
9	City of Watsonville ²	[Facilities Maintenance Supervisor/ Construction Manager]	\$ 9,010	100.00%	\$ 9,010	7/9/2022	unknown	unknown
10	Housing Authority County of Santa Barbara	Maintenance Manager II	\$ 8,901	99.00%	\$ 8,991	12/23/2022	unknown	unknown
11	Housing Authority County of Santa Cruz	Facilities Manager	\$ 8,804	100.00%	\$ 8,804	7/2/2023	unknown	unknown
12	Housing Authority Contra Costa County ⁵	[Housing Technical Officer/ Maintenance Supervisor]	\$ 8,760	110.00%	\$ 7,964	6/24/2023	unknown	unknown

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 11,076	\$ 10,373
% Housing Authority County of Santa Cruz Above/Below	-25.8%	-17.8%
Median of Comparators	\$ 10,518	\$ 10,132
% Housing Authority County of Santa Cruz Above/Below	-19.5%	-15.1%
Number of Matches	11	11

N/C - Non Comparator

1 - City of Santa Cruz: New rate includes 2% COLA + new top step equiv to 5%

2 - City of Watsonville: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

3 - County of Santa Cruz: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

4 - Housing Authority City of Alameda: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

5 - Housing Authority Contra Costa County: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

6 - Housing Authority of San Luis Obispo: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Family Self Sufficiency Coordinator								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	County of Santa Cruz	Employment & Training Specialist II	\$ 7,399	100.00%	\$ 7,399	9/1/2023	unknown	unknown
2	Housing Authority County of San Mateo	Housing Programs Specialist III	\$ 8,539	116.10%	\$ 7,355	10/1/2023	unknown	unknown
3	Housing Authority City of Oakland	Housing Assistance Representative II	\$ 7,851	110.40%	\$ 7,111	7/1/2023	unknown	unknown
4	Housing Authority County of Santa Cruz	Family Self Sufficiency Coordinator	\$ 6,079	100.00%	\$ 6,079	7/2/2023	unknown	unknown
5	Housing Authority of San Luis Obispo	Resident Services Coordinator	\$ 5,778	95.80%	\$ 6,031	10/1/2023	unknown	unknown
6	Housing Authority Contra Costa County	Family Self Sufficiency Coordinator	\$ 6,539	110.00%	\$ 5,945	6/24/2023	unknown	unknown
7	Housing Authority County of Santa Barbara	Resident Services Specialist	\$ 5,854	99.00%	\$ 5,913	12/23/2022	unknown	unknown
8	Housing Authority County of Alameda	Family Self Sufficiency Coordinator	\$ 6,258	110.60%	\$ 5,658	6/10/2023	6/8/2024	4.00%
9	City of Santa Cruz	N/C						
10	City of Watsonville	N/C						
11	Housing Authority City of Alameda	N/C						
12	Housing Authority County of Santa Clara	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 6,888	\$ 6,487
% Housing Authority County of Santa Cruz Above/Below	-13.3%	-6.7%
Median of Comparators	\$ 6,539	\$ 6,031
% Housing Authority County of Santa Cruz Above/Below	-7.6%	0.8%
Number of Matches	7	7

N/C - Non Comparator

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Finance Director								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda	Director of Finance/Chief Financial Officer	\$ 21,704	110.60%	\$ 19,624	7/30/2023	unknown	unknown
2	Housing Authority County of Santa Clara	CFO/Director of Finance	\$ 22,503	115.50%	\$ 19,483	8/5/2023	unknown	unknown
3	Housing Authority City of Oakland	Director of Finance	\$ 19,048	110.40%	\$ 17,254	7/1/2023	unknown	unknown
4	Housing Authority of San Luis Obispo	Director of Finance/CFO	\$ 16,309	95.80%	\$ 17,024	10/1/2023	unknown	unknown
5	Housing Authority County of Santa Cruz	Finance Director	\$ 15,157	100.00%	\$ 15,157	7/2/2023	unknown	unknown
6	Housing Authority County of Alameda	Finance Director	\$ 16,419	110.60%	\$ 14,845	6/30/2023	unknown	unknown
7	City of Watsonville ¹	[Administrative Services Director/ Assistant Finance Director]	\$ 14,775	100.00%	\$ 14,775	7/9/2022	unknown	unknown
8	Housing Authority County of Santa Barbara	Director of Finance	\$ 14,278	99.00%	\$ 14,422	12/23/2022	unknown	unknown
9	Housing Authority County of San Mateo	Financial Services Manager	\$ 15,418	116.10%	\$ 13,280	10/1/2023	unknown	unknown
10	Housing Authority Contra Costa County	Director of Finance	\$ 13,163	110.00%	\$ 11,966	6/24/2023	unknown	unknown
11	City of Santa Cruz	N/C						
12	County of Santa Cruz	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 17,068	\$ 15,853
% Housing Authority County of Santa Cruz Above/Below	-12.6%	-4.6%
Median of Comparators	\$ 16,309	\$ 14,845
% Housing Authority County of Santa Cruz Above/Below	-7.6%	2.1%
Number of Matches	9	9

N/C - Non Comparator

1 - City of Watsonville: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Housing Inspector								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda ¹	Housing Specialist III	\$ 10,353	110.60%	\$ 9,361	10/23/2022	unknown	unknown
2	Housing Authority County of Santa Clara	Asset Management Specialist	\$ 8,805	115.50%	\$ 7,623	8/5/2023	unknown	unknown
3	Housing Authority City of Oakland	Housing Assistance Representative II	\$ 7,851	110.40%	\$ 7,111	7/1/2023	unknown	unknown
4	Housing Authority County of San Mateo	Housing Programs Specialist II	\$ 7,758	116.10%	\$ 6,683	10/1/2023	unknown	unknown
5	Housing Authority of San Luis Obispo	Housing Inspector & Landlord Liaison	\$ 6,072	95.80%	\$ 6,338	10/1/2023	unknown	unknown
6	Housing Authority County of Santa Cruz	Housing Inspector	\$ 6,231	100.00%	\$ 6,231	7/2/2023	unknown	unknown
7	Housing Authority County of Santa Barbara	Housing Location Specialist/Negotiator/Inspector	\$ 6,074	99.00%	\$ 6,135	12/23/2022	unknown	unknown
8	Housing Authority Contra Costa County	Housing Program Specialist	\$ 6,539	110.00%	\$ 5,945	6/24/2023	unknown	unknown
9	Housing Authority County of Alameda	Housing Inspector	\$ 6,060	110.60%	\$ 5,479	6/10/2023	6/8/2024	4.00%
10	City of Santa Cruz	N/C						
11	City of Watsonville	N/C						
12	County of Santa Cruz	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 7,439	\$ 6,834
% Housing Authority County of Santa Cruz Above/Below	-19.4%	-9.7%
Median of Comparators	\$ 7,149	\$ 6,510
% Housing Authority County of Santa Cruz Above/Below	-14.7%	-4.5%
Number of Matches	8	8

N/C - Non Comparator

1 - Housing Authority City of Alameda: Salary schedule indicates a 37.5 hour work week for this non-exempt classification; Top Monthly Salary has been adjusted for 40 hour work week.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Housing Program (Specialist) Supervisor								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Oakland	Housing Assistance Manager	\$ 12,831	110.40%	\$ 11,622	7/1/2023	unknown	unknown
2	Housing Authority City of Alameda	Housing Programs Supervisor	\$ 11,237	110.60%	\$ 10,160	8/28/2022	unknown	unknown
3	Housing Authority County of Santa Clara	Housing Programs Supervisor	\$ 11,271	115.50%	\$ 9,759	8/5/2023	unknown	unknown
4	Housing Authority of San Luis Obispo	Administrative Support Manager	\$ 9,012	95.80%	\$ 9,407	10/1/2023	unknown	unknown
5	Housing Authority County of San Mateo	Housing Programs Supervisor	\$ 10,806	116.10%	\$ 9,307	10/1/2023	unknown	unknown
6	Housing Authority County of Santa Barbara	Housing Manager	\$ 8,612	99.00%	\$ 8,699	12/23/2022	unknown	unknown
7	Housing Authority County of Santa Cruz	Housing Program (Specialist) Supervisor	\$ 8,176	100.00%	\$ 8,176	7/2/2023	unknown	unknown
8	Housing Authority Contra Costa County	Housing Manager	\$ 8,345	110.00%	\$ 7,587	6/24/2023	unknown	unknown
9	Housing Authority County of Alameda	Eligibility Leadworker	\$ 7,594	110.60%	\$ 6,866	6/10/2023	6/8/2024	4.00%
10	City of Santa Cruz	N/C						
11	City of Watsonville	N/C						
12	County of Santa Cruz	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 9,963	\$ 9,176
% Housing Authority County of Santa Cruz Above/Below	-21.9%	-12.2%
Median of Comparators	\$ 9,909	\$ 9,357
% Housing Authority County of Santa Cruz Above/Below	-21.2%	-14.4%
Number of Matches	8	8

N/C - Non Comparator

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Housing Program Director								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Oakland	Director of Leased Housing	\$ 19,048	110.40%	\$ 17,254	7/1/2023	unknown	unknown
2	Housing Authority City of Alameda	Director of Housing Programs	\$ 18,749	110.60%	\$ 16,952	7/30/2023	unknown	unknown
3	Housing Authority County of Santa Clara ¹	[Assistant Director of Housing and Compliance/ Housing Programs Manager]	\$ 16,273	115.50%	\$ 14,088	8/5/2023	unknown	unknown
4	Housing Authority County of Santa Cruz	Housing Program Director	\$ 13,732	100.00%	\$ 13,732	7/2/2023	unknown	unknown
5	Housing Authority of San Luis Obispo ²	[Director of Housing Management/ HCV Manager]	\$ 13,129	95.80%	\$ 13,704	10/1/2023	unknown	unknown
6	Housing Authority County of Alameda	Housing Programs Manager	\$ 14,874	110.60%	\$ 13,448	6/30/2023	unknown	unknown
7	Housing Authority County of San Mateo	Rental Programs Manager	\$ 15,418	116.10%	\$ 13,280	10/1/2023	unknown	unknown
8	City of Santa Cruz	Housing & Community Development Manager	\$ 13,061	100.00%	\$ 13,061	8/19/2023	8/17/2024	5.00%
9	County of Santa Cruz	Housing Coordinator	\$ 12,227	100.00%	\$ 12,227	9/16/2023	9/1/2024	3.00%
10	Housing Authority Contra Costa County	Director of Assisted Housing Programs	\$ 13,163	110.00%	\$ 11,966	6/24/2023	unknown	unknown
11	City of Watsonville	Housing Manager	\$ 11,452	100.00%	\$ 11,452	7/9/2022	unknown	unknown
12	Housing Authority County of Santa Barbara	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 14,739	\$ 13,743
% Housing Authority County of Santa Cruz Above/Below	-7.3%	-0.1%
Median of Comparators	\$ 14,019	\$ 13,364
% Housing Authority County of Santa Cruz Above/Below	-2.1%	2.7%
Number of Matches	10	10

N/C - Non Comparator

1 - Housing Authority of County of Santa Clara: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

2 - Housing Authority of San Luis Obispo: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Housing Program Specialist								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda ¹	Housing Specialist II	\$ 9,391	110.60%	\$ 8,491	10/23/2022	unknown	unknown
2	City of Santa Cruz	Housing Programs Specialist	\$ 8,087	100.00%	\$ 8,087	9/2/2023	8/17/2024	3.50%
3	Housing Authority City of Oakland	Housing Assistance Representative II	\$ 7,851	110.40%	\$ 7,111	7/1/2023	unknown	unknown
4	Housing Authority County of San Mateo	Housing Programs Specialist II	\$ 7,758	116.10%	\$ 6,683	10/1/2023	unknown	unknown
5	Housing Authority of San Luis Obispo	Housing Specialist II	\$ 6,379	95.80%	\$ 6,659	10/1/2023	unknown	unknown
6	Housing Authority County of Santa Clara	Housing Programs Specialist II	\$ 7,227	115.50%	\$ 6,257	8/5/2023	unknown	unknown
7	Housing Authority County of Santa Barbara	Affordable Housing Specialist/ Partner	\$ 6,146	99.00%	\$ 6,208	12/23/2022	unknown	unknown
8	Housing Authority County of Santa Cruz	Housing Program Specialist	\$ 6,079	100.00%	\$ 6,079	7/2/2023	unknown	unknown
9	Housing Authority County of Alameda	Eligibility Technician	\$ 5,831	110.60%	\$ 5,272	6/10/2023	6/8/2024	4.00%
10	Housing Authority Contra Costa County	Housing Assistant	\$ 5,615	110.00%	\$ 5,105	6/24/2023	unknown	unknown
11	City of Watsonville	N/C						
12	County of Santa Cruz	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 7,143	\$ 6,653
% Housing Authority County of Santa Cruz Above/Below	-17.5%	-9.4%
Median of Comparators	\$ 7,227	\$ 6,659
% Housing Authority County of Santa Cruz Above/Below	-18.9%	-9.5%
Number of Matches	9	9

N/C - Non Comparator

1 - Housing Authority City of Alameda: Salary schedule indicates a 37.5 hour work week for this non-exempt classification; Top Monthly Salary has been adjusted for 40 hour work week.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Leasing Specialist								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda ¹	Housing Specialist II	\$ 9,391	110.60%	\$ 8,491	10/23/2022	unknown	unknown
2	Housing Authority City of Oakland	Housing Assistance Representative II	\$ 7,851	110.40%	\$ 7,111	7/1/2023	unknown	unknown
3	Housing Authority County of Santa Clara	Owner Services Specialist	\$ 7,593	115.50%	\$ 6,574	8/5/2023	unknown	unknown
4	Housing Authority County of Santa Cruz	Leasing Specialist	\$ 6,547	100.00%	\$ 6,547	7/2/2023	unknown	unknown
5	Housing Authority of San Luis Obispo	Leasing Specialist	\$ 6,223	95.80%	\$ 6,496	10/1/2023	unknown	unknown
6	Housing Authority County of Alameda	Housing Specialist	\$ 6,955	110.60%	\$ 6,288	6/10/2023	6/8/2024	4.00%
7	Housing Authority County of Santa Barbara	Housing Location Specialist/Negotiator/Inspector	\$ 6,074	99.00%	\$ 6,135	12/23/2022	unknown	unknown
8	Housing Authority Contra Costa County	Housing Program Specialist	\$ 6,539	110.00%	\$ 5,945	6/24/2023	unknown	unknown
9	City of Santa Cruz	N/C						
10	City of Watsonville	N/C						
11	County of Santa Cruz	N/C						
12	Housing Authority County of San Mateo	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 7,232	\$ 6,720
% Housing Authority County of Santa Cruz Above/Below	-10.5%	-2.6%
Median of Comparators	\$ 6,955	\$ 6,496
% Housing Authority County of Santa Cruz Above/Below	-6.2%	0.8%
Number of Matches	7	7

N/C - Non Comparator

1 - Housing Authority City of Alameda: Salary schedule indicates a 37.5 hour work week for this non-exempt classification; Top Monthly Salary has been adjusted for 40 hour work week.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Maintenance Worker II								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda	Maintenance Technician II	\$ 8,590	110.60%	\$ 7,767	8/28/2022	unknown	unknown
2	Housing Authority County of Santa Barbara	Maintenance Specialist	\$ 6,732	99.00%	\$ 6,800	12/23/2022	unknown	unknown
3	County of Santa Cruz	Building Maintenance Worker II	\$ 6,751	100.00%	\$ 6,751	9/1/2023	unknown	unknown
4	Housing Authority City of Oakland ¹	[Maintenance Mechanic/ Building & Grounds Worker II]	\$ 7,183	110.40%	\$ 6,506	7/1/2023	unknown	unknown
5	Housing Authority County of San Mateo	Maintenance Specialist II	\$ 7,472	116.10%	\$ 6,436	10/1/2023	unknown	unknown
6	City of Santa Cruz	Building Maintenance Worker II	\$ 6,187	100.00%	\$ 6,187	9/2/2023	8/31/2024	3.50%
7	Housing Authority County of Alameda	Maintenance Worker II	\$ 6,732	110.60%	\$ 6,087	6/10/2023	6/8/2024	4.00%
8	Housing Authority County of Santa Cruz	Maintenance Worker II	\$ 5,931	100.00%	\$ 5,931	7/2/2023	unknown	unknown
9	Housing Authority of San Luis Obispo ²	[Maintenance Technician/ Grounds Technician]	\$ 5,637	95.80%	\$ 5,884	10/1/2023	unknown	unknown
10	City of Watsonville	Building Maintenance Worker	\$ 5,848	100.00%	\$ 5,848	7/1/2023	7/1/2024	2.00%
11	Housing Authority Contra Costa County	Maintenance Mechanic B	\$ 6,183	110.00%	\$ 5,620	6/24/2023	unknown	unknown
12	Housing Authority County of Santa Clara	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 6,731	\$ 6,389
% Housing Authority County of Santa Cruz Above/Below	-13.5%	-7.7%
Median of Comparators	\$ 6,732	\$ 6,312
% Housing Authority County of Santa Cruz Above/Below	-13.5%	-6.4%
Number of Matches	10	10

N/C - Non Comparator

1 - Housing Authority City of Oakland: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

2 - Housing Authority of San Luis Obispo: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Principal Management Analyst								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda	Principal Management Analyst	\$ 16,602	110.60%	\$ 15,011	10/23/2022	unknown	unknown
2	County of Santa Cruz ¹	[Principal Administrative Analyst/ Senior Administrative Analyst]	\$ 12,759	100.00%	\$ 12,759	9/16/2023	unknown	unknown
3	Housing Authority County of Santa Cruz	Principal Management Analyst	\$ 11,270	100.00%	\$ 11,270	7/2/2023	unknown	unknown
4	City of Santa Cruz	Principal Management Analyst	\$ 11,267	100.00%	\$ 11,267	8/19/2023	8/17/2024	5.00%
5	Housing Authority County of San Mateo	Senior Housing and Community Development Policy Analyst	\$ 12,906	116.10%	\$ 11,116	10/1/2023	unknown	unknown
6	Housing Authority County of Alameda	Senior Administrative Analyst	\$ 12,208	110.60%	\$ 11,038	6/30/2023	unknown	unknown
7	Housing Authority County of Santa Clara	Senior Housing Policy Analyst	\$ 12,441	115.50%	\$ 10,772	8/5/2023	unknown	unknown
8	City of Watsonville	N/C						
9	Housing Authority City of Oakland	N/C						
10	Housing Authority Contra Costa County	N/C						
11	Housing Authority County of Santa Barbara	N/C						
12	Housing Authority of San Luis Obispo	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 13,031	\$ 11,994
% Housing Authority County of Santa Cruz Above/Below	-15.6%	-6.4%
Median of Comparators	\$ 12,600	\$ 11,192
% Housing Authority County of Santa Cruz Above/Below	-11.8%	0.7%
Number of Matches	6	6

N/C - Non Comparator

1 - County of Santa Cruz: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Program Integrity Specialist								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Alameda ¹	Housing Specialist III	\$ 10,353	110.60%	\$ 9,361	10/23/2022	unknown	unknown
2	County of Santa Cruz	Welfare Fraud Investigator II	\$ 8,847	100.00%	\$ 8,847	9/1/2023	unknown	unknown
3	Housing Authority County of Santa Clara	Housing Compliance Coordinator	\$ 9,251	115.50%	\$ 8,009	8/5/2023	unknown	unknown
4	Housing Authority County of Santa Cruz	Program Integrity Specialist	\$ 7,592	100.00%	\$ 7,592	7/2/2023	unknown	unknown
5	Housing Authority of San Luis Obispo	Program Integrity Specialist	\$ 6,701	95.80%	\$ 6,995	10/1/2023	unknown	unknown
6	Housing Authority County of San Mateo ²	[Investigative Analyst/ Overpayments and Collections Analyst II]	\$ 7,945	116.10%	\$ 6,843	10/1/2023	unknown	unknown
7	Housing Authority Contra Costa County	Housing Program Specialist	\$ 6,539	110.00%	\$ 5,945	6/24/2023	unknown	unknown
8	City of Santa Cruz	N/C						
9	City of Watsonville	N/C						
10	Housing Authority City of Oakland	N/C						
11	Housing Authority County of Alameda	N/C						
12	Housing Authority County of Santa Barbara	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 8,273	\$ 7,667
% Housing Authority County of Santa Cruz Above/Below	-9.0%	-1.0%
Median of Comparators	\$ 8,396	\$ 7,502
% Housing Authority County of Santa Cruz Above/Below	-10.6%	1.2%
Number of Matches	6	6

N/C - Non Comparator

1 - Housing Authority City of Alameda: Salary schedule indicates a 37.5 hour work week for this non-exempt classification; Top Monthly Salary has been adjusted for 40 hour work week.

2 - Housing Authority County of San Mateo: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Property Management & Client Services Director								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Oakland	Director of Property Management	\$ 19,048	110.40%	\$ 17,254	7/1/2023	unknown	unknown
2	Housing Authority City of Alameda	Director of Portfolio Management	\$ 18,749	110.60%	\$ 16,952	7/30/2023	unknown	unknown
3	Housing Authority County of Santa Cruz	Property Management & Client Services Director	\$ 13,732	100.00%	\$ 13,732	7/2/2023	unknown	unknown
4	Housing Authority County of Santa Barbara ¹	[Director of Operations/ Maintenance Manager]	\$ 13,272	99.00%	\$ 13,406	12/23/2022	unknown	unknown
5	Housing Authority of San Luis Obispo ²	[Director of Housing Management/ Director of Resident Services]	\$ 12,661	95.80%	\$ 13,216	10/1/2023	unknown	unknown
6	Housing Authority Contra Costa County	Director of General Services	\$ 10,342	110.00%	\$ 9,402	6/24/2023	unknown	unknown
7	City of Santa Cruz	N/C						
8	City of Watsonville	N/C						
9	County of Santa Cruz	N/C						
10	Housing Authority County of Alameda	N/C						
11	Housing Authority County of San Mateo	N/C						
12	Housing Authority County of Santa Clara	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 14,814	\$ 14,046
% Housing Authority County of Santa Cruz Above/Below	-7.9%	-2.3%
Median of Comparators	\$ 13,272	\$ 13,406
% Housing Authority County of Santa Cruz Above/Below	3.3%	2.4%
Number of Matches	5	5

N/C - Non Comparator

1 - Housing Authority County of Santa Barbara: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

2 - Housing Authority of San Luis Obispo: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.

Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023

Property Management Assistant Director								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Oakland	Assistant Director of Property Operations	\$ 15,252	110.40%	\$ 13,815	7/1/2023	unknown	unknown
2	Housing Authority City of Alameda ¹	[Director of Portfolio Management/ Property Management Supervisor]	\$ 14,993	110.60%	\$ 13,556	7/30/2023	unknown	unknown
3	Housing Authority County of Santa Cruz	Property Management Assistant Director	\$ 10,210	100.00%	\$ 10,210	7/2/2023	unknown	unknown
4	Housing Authority of San Luis Obispo	Portfolio Manager	\$ 9,467	95.80%	\$ 9,882	10/1/2023	unknown	unknown
5	City of Santa Cruz	N/C						
6	City of Watsonville	N/C						
7	County of Santa Cruz	N/C						
8	Housing Authority Contra Costa County	N/C						
9	Housing Authority County of Alameda	N/C						
10	Housing Authority County of San Mateo	N/C						
11	Housing Authority County of Santa Barbara	N/C						
12	Housing Authority County of Santa Clara	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	Insuff. Data	Insuff. Data
% Housing Authority County of Santa Cruz Above/Below	Insuff. Data	Insuff. Data
Median of Comparators	Insuff. Data	Insuff. Data
% Housing Authority County of Santa Cruz Above/Below	Insuff. Data	Insuff. Data
Number of Matches	3	3

N/C - Non Comparator

1 - Housing Authority City of Alameda: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches. Property Management Supervisor salary listed effective date is 8/28/2022.

**Housing Authority County of Santa Cruz
Market Compensation Data (sorted by Adjusted Top Monthly Salary)
November 2023**

Property Management Specialist								
Rank	Comparator Agency	Classification Title	Unadjusted Top Monthly Salary	Geographic Differential	Adjusted Top Monthly Salary	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Housing Authority City of Oakland	Housing Assistance Representative II	\$ 7,851	110.40%	\$ 7,111	7/1/2023	unknown	unknown
2	Housing Authority County of Santa Clara	Leasing Specialist	\$ 7,593	115.50%	\$ 6,574	8/5/2023	unknown	unknown
3	Housing Authority County of Santa Cruz	Property Management Specialist	\$ 6,547	100.00%	\$ 6,547	7/2/2023	unknown	unknown
4	Housing Authority County of Santa Barbara	Affordable Housing Specialist/ Partner	\$ 6,146	99.00%	\$ 6,208	12/23/2022	unknown	unknown
5	Housing Authority Contra Costa County	Senior Property Assistant	\$ 6,537	110.00%	\$ 5,943	6/24/2023	unknown	unknown
6	Housing Authority of San Luis Obispo ¹	[Property Supervisor/ Property Assistant II]	\$ 5,603	95.80%	\$ 5,849	10/1/2023	unknown	unknown
7	Housing Authority County of Alameda	Property Management Assistant	\$ 6,258	110.60%	\$ 5,658	6/10/2023	6/8/2024	4.00%
8	City of Santa Cruz	N/C						
9	City of Watsonville	N/C						
10	County of Santa Cruz	N/C						
11	Housing Authority City of Alameda	N/C						
12	Housing Authority County of San Mateo	N/C						

Summary Results	Unadjusted Top Monthly Salary	Adjusted Top Monthly Salary
Average of Comparators	\$ 6,665	\$ 6,224
% Housing Authority County of Santa Cruz Above/Below	-1.8%	4.9%
Median of Comparators	\$ 6,397	\$ 6,075
% Housing Authority County of Santa Cruz Above/Below	2.3%	7.2%
Number of Matches	6	6

N/C - Non Comparator

1 - Housing Authority of San Luis Obispo: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower level classification at the comparator agency. The salary displayed is an average of the matches.



Appendix III

Proposed Salary Range Schedule

Housing Authority County of Santa Cruz
Appendix III: Proposed Salary Plan
January 2024

FACTORS
Range 8, Step 5, Annual \$51,624.00
Step Increase 5.00%
Range Increase 2.50%
Pay Periods per Year 26
Hours per Year 2,080

Salary Range	Annually					Monthly					Per Pay Period					Hourly				
	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5
1	35,730	37,516	39,392	41,361	43,429	2,977	3,126	3,283	3,447	3,619	1,374.21	1,442.92	1,515.07	1,590.82	1,670.36	17.18	18.04	18.94	19.89	20.88
2	36,623	38,454	40,377	42,395	44,515	3,052	3,204	3,365	3,533	3,710	1,408.57	1,479.00	1,552.95	1,630.59	1,712.12	17.61	18.49	19.41	20.38	21.40
3	37,538	39,415	41,386	43,455	45,628	3,128	3,285	3,449	3,621	3,802	1,443.78	1,515.97	1,591.77	1,671.36	1,754.93	18.05	18.95	19.90	20.89	21.94
4	38,477	40,401	42,421	44,542	46,769	3,206	3,367	3,535	3,712	3,897	1,479.88	1,553.87	1,631.56	1,713.14	1,798.80	18.50	19.42	20.39	21.41	22.48
5	39,439	41,411	43,481	45,655	47,938	3,287	3,451	3,623	3,805	3,995	1,516.87	1,592.72	1,672.35	1,755.97	1,843.77	18.96	19.91	20.90	21.95	23.05
6	40,425	42,446	44,568	46,797	49,136	3,369	3,537	3,714	3,900	4,095	1,554.80	1,632.54	1,714.16	1,799.87	1,889.86	19.43	20.41	21.43	22.50	23.62
7	41,435	43,507	45,682	47,967	50,365	3,453	3,626	3,807	3,997	4,197	1,593.67	1,673.35	1,757.02	1,844.87	1,937.11	19.92	20.92	21.96	23.06	24.21
8	42,471	44,595	46,824	49,166	51,624	3,539	3,716	3,902	4,097	4,302	1,633.51	1,715.18	1,800.94	1,890.99	1,985.54	20.42	21.44	22.51	23.64	24.82
9	43,533	45,710	47,995	50,395	52,915	3,628	3,809	4,000	4,200	4,410	1,674.35	1,758.06	1,845.97	1,938.26	2,035.18	20.93	21.98	23.07	24.23	25.44
10	44,621	46,852	49,195	51,655	54,237	3,718	3,904	4,100	4,305	4,520	1,716.20	1,802.01	1,892.11	1,986.72	2,086.06	21.45	22.53	23.65	24.83	26.08
11	45,737	48,024	50,425	52,946	55,593	3,811	4,002	4,202	4,412	4,633	1,759.11	1,847.06	1,939.42	2,036.39	2,138.21	21.99	23.09	24.24	25.45	26.73
12	46,880	49,224	51,685	54,270	56,983	3,907	4,102	4,307	4,522	4,749	1,803.09	1,893.24	1,987.90	2,087.30	2,191.66	22.54	23.67	24.85	26.09	27.40
13	48,052	50,455	52,978	55,626	58,408	4,004	4,205	4,415	4,636	4,867	1,848.16	1,940.57	2,037.60	2,139.48	2,246.45	23.10	24.26	25.47	26.74	28.08
14	49,254	51,716	54,302	57,017	59,868	4,104	4,310	4,525	4,751	4,989	1,894.37	1,989.09	2,088.54	2,192.97	2,302.62	23.68	24.86	26.11	27.41	28.78
15	50,485	53,009	55,660	58,443	61,365	4,207	4,417	4,638	4,870	5,114	1,941.73	2,038.81	2,140.75	2,247.79	2,360.18	24.27	25.49	26.76	28.10	29.50
16	51,747	54,334	57,051	59,904	62,899	4,312	4,528	4,754	4,992	5,242	1,990.27	2,089.78	2,194.27	2,303.99	2,419.19	24.88	26.12	27.43	28.80	30.24
17	53,041	55,693	58,477	61,401	64,471	4,420	4,641	4,873	5,117	5,373	2,040.03	2,142.03	2,249.13	2,361.59	2,479.67	25.50	26.78	28.11	29.52	31.00
18	54,367	57,085	59,939	62,936	66,083	4,531	4,757	4,995	5,245	5,507	2,091.03	2,195.58	2,305.36	2,420.63	2,541.66	26.14	27.44	28.82	30.26	31.77
19	55,726	58,512	61,438	64,510	67,735	4,644	4,876	5,120	5,376	5,645	2,143.30	2,250.47	2,362.99	2,481.14	2,605.20	26.79	28.13	29.54	31.01	32.56
20	57,119	59,975	62,974	66,122	69,429	4,760	4,998	5,248	5,510	5,786	2,196.89	2,306.73	2,422.07	2,543.17	2,670.33	27.46	28.83	30.28	31.79	33.38
21	58,547	61,474	64,548	67,775	71,164	4,879	5,123	5,379	5,648	5,930	2,251.81	2,364.40	2,482.62	2,606.75	2,737.09	28.15	29.55	31.03	32.58	34.21
22	60,011	63,011	66,162	69,470	72,943	5,001	5,251	5,513	5,789	6,079	2,308.10	2,423.51	2,544.68	2,671.92	2,805.51	28.85	30.29	31.81	33.40	35.07
23	61,511	64,586	67,816	71,207	74,767	5,126	5,382	5,651	5,934	6,231	2,365.81	2,484.10	2,608.30	2,738.72	2,875.65	29.57	31.05	32.60	34.23	35.95
24	63,049	66,201	69,511	72,987	76,636	5,254	5,517	5,793	6,082	6,386	2,424.95	2,546.20	2,673.51	2,807.18	2,947.54	30.31	31.83	33.42	35.09	36.84
25	64,625	67,856	71,249	74,811	78,552	5,385	5,655	5,937	6,234	6,546	2,485.57	2,609.85	2,740.35	2,877.36	3,021.23	31.07	32.62	34.25	35.97	37.77
26	66,241	69,533	73,030	76,682	80,516	5,520	5,796	6,086	6,390	6,710	2,547.71	2,675.10	2,808.85	2,949.30	3,096.76	31.85	33.44	35.11	36.87	38.71
27	67,897	71,291	74,856	78,599	82,529	5,658	5,941	6,238	6,550	6,877	2,611.41	2,741.98	2,879.08	3,023.03	3,174.18	32.64	34.27	35.99	37.79	39.68
28	69,594	73,074	76,727	80,564	84,592	5,799	6,089	6,394	6,714	7,049	2,676.69	2,810.53	2,951.05	3,098.61	3,253.54	33.46	35.13	36.89	38.73	40.67
29	71,334	74,901	78,646	82,578	86,707	5,944	6,242	6,554	6,881	7,226	2,743.61	2,880.79	3,024.83	3,176.07	3,334.87	34.30	36.01	37.81	39.70	41.69
30	73,117	76,773	80,612	84,642	88,874	6,093	6,398	6,718	7,054	7,406	2,812.20	2,952.81	3,100.45	3,255.47	3,418.25	35.15	36.91	38.76	40.69	42.73
31	74,945	78,692	82,627	86,758	91,096	6,245	6,558	6,886	7,230	7,591	2,882.50	3,026.63	3,177.96	3,336.86	3,503.70	36.03	37.83	39.72	41.71	43.80
32	76,819	80,660	84,693	88,927	93,374	6,402	6,722	7,058	7,411	7,781	2,954.57	3,102.30	3,257.41	3,420.28	3,591.29	36.93	38.78	40.72	42.75	44.89
33	78,739	82,676	86,810	91,150	95,708	6,562	6,890	7,234	7,596	7,976	3,028.43	3,179.85	3,338.85	3,505.79	3,681.08	37.86	39.75	41.74	43.82	46.01
34	80,708	84,743	88,980	93,429	98,101	6,726	7,062	7,415	7,786	8,175	3,104.14	3,259.35	3,422.32	3,593.43	3,773.10	38.80	40.74	42.78	44.92	47.16
35	82,725	86,862	91,205	95,765	100,553	6,894	7,238	7,600	7,980	8,379	3,181.75	3,340.83	3,507.87	3,683.27	3,867.43	39.77	41.76	43.85	46.04	48.34
36	84,794	89,033	93,485	98,159	103,067	7,066	7,419	7,790	8,180	8,589	3,261.29	3,424.35	3,595.57	3,775.35	3,964.12	40.77	42.80	44.94	47.19	49.55
37	86,913	91,259	95,822	100,613	105,644	7,243	7,605	7,985	8,384	8,804	3,342.82	3,509.96	3,685.46	3,869.73	4,063.22	41.79	43.87	46.07	48.37	50.79

**Housing Authority County of Santa Cruz
Appendix III: Proposed Salary Plan
January 2024**

Salary Range	Annually					Monthly					Per Pay Period					Hourly				
	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5
38	89,086	93,541	98,218	103,128	108,285	7,424	7,795	8,185	8,594	9,024	3,426.39	3,597.71	3,777.60	3,966.68	4,164.80	42.83	44.97	47.22	49.58	52.06
39	91,313	95,879	100,673	105,707	110,992	7,609	7,990	8,389	8,809	9,249	3,512.05	3,687.65	3,872.04	4,065.64	4,268.92	43.90	46.10	48.40	50.82	53.36
40	93,596	98,276	103,190	108,349	113,767	7,800	8,190	8,599	9,029	9,481	3,599.85	3,779.85	3,968.84	4,167.28	4,375.64	45.00	47.25	49.61	52.09	54.70
41	95,936	100,733	105,770	111,058	116,611	7,995	8,394	8,814	9,255	9,718	3,689.85	3,874.34	4,068.06	4,271.46	4,485.04	46.12	48.43	50.85	53.39	56.06
42	98,334	103,251	108,414	113,834	119,526	8,195	8,604	9,034	9,486	9,961	3,782.10	3,971.20	4,169.76	4,378.25	4,597.16	47.28	49.64	52.12	54.73	57.46
43	100,793	105,832	111,124	116,680	122,514	8,399	8,819	9,260	9,723	10,210	3,876.65	4,070.48	4,274.00	4,487.70	4,712.09	48.46	50.88	53.43	56.10	58.90
44	103,313	108,478	113,902	119,597	125,577	8,609	9,040	9,492	9,966	10,465	3,973.56	4,172.24	4,380.85	4,599.90	4,829.89	49.67	52.15	54.76	57.50	60.37
45	105,895	111,190	116,750	122,587	128,717	8,825	9,266	9,729	10,216	10,726	4,072.90	4,276.55	4,490.38	4,714.89	4,950.64	50.91	53.46	56.13	58.94	61.88
46	108,543	113,970	119,669	125,652	131,935	9,045	9,498	9,972	10,471	10,995	4,174.73	4,383.46	4,602.64	4,832.77	5,074.41	52.18	54.79	57.53	60.41	63.43
47	111,256	116,819	122,660	128,793	135,233	9,271	9,735	10,222	10,733	11,269	4,279.09	4,493.05	4,717.70	4,953.59	5,201.27	53.49	56.16	58.97	61.92	65.02
48	114,038	119,740	125,727	132,013	138,614	9,503	9,978	10,477	11,001	11,551	4,386.07	4,605.38	4,835.64	5,077.43	5,331.30	54.83	57.57	60.45	63.47	66.64
49	116,889	122,733	128,870	135,313	142,079	9,741	10,228	10,739	11,276	11,840	4,495.72	4,720.51	4,956.54	5,204.36	5,464.58	56.20	59.01	61.96	65.05	68.31
50	119,811	125,802	132,092	138,696	145,631	9,984	10,483	11,008	11,558	12,136	4,608.12	4,838.52	5,080.45	5,334.47	5,601.19	57.60	60.48	63.51	66.68	70.01
51	122,806	128,947	135,394	142,164	149,272	10,234	10,746	11,283	11,847	12,439	4,723.32	4,959.49	5,207.46	5,467.83	5,741.22	59.04	61.99	65.09	68.35	71.77
52	125,876	132,170	138,779	145,718	153,004	10,490	11,014	11,565	12,143	12,750	4,841.40	5,083.47	5,337.65	5,604.53	5,884.75	60.52	63.54	66.72	70.06	73.56
53	129,023	135,475	142,248	149,361	156,829	10,752	11,290	11,854	12,447	13,069	4,962.44	5,210.56	5,471.09	5,744.64	6,031.87	62.03	65.13	68.39	71.81	75.40
54	132,249	138,861	145,804	153,095	160,749	11,021	11,572	12,150	12,758	13,396	5,086.50	5,340.82	5,607.86	5,888.26	6,182.67	63.58	66.76	70.10	73.60	77.28
55	135,555	142,333	149,450	156,922	164,768	11,296	11,861	12,454	13,077	13,731	5,213.66	5,474.34	5,748.06	6,035.46	6,337.24	65.17	68.43	71.85	75.44	79.22
56	138,944	145,891	153,186	160,845	168,887	11,579	12,158	12,765	13,404	14,074	5,344.00	5,611.20	5,891.76	6,186.35	6,495.67	66.80	70.14	73.65	77.33	81.20
57	142,418	149,539	157,015	164,866	173,110	11,868	12,462	13,085	13,739	14,426	5,477.60	5,751.48	6,039.06	6,341.01	6,658.06	68.47	71.89	75.49	79.26	83.23
58	145,978	153,277	160,941	168,988	177,437	12,165	12,773	13,412	14,082	14,786	5,614.54	5,895.27	6,190.03	6,499.53	6,824.51	70.18	73.69	77.38	81.24	85.31
59	149,628	157,109	164,964	173,213	181,873	12,469	13,092	13,747	14,434	15,156	5,754.91	6,042.65	6,344.78	6,662.02	6,995.12	71.94	75.53	79.31	83.28	87.44
60	153,368	161,037	169,088	177,543	186,420	12,781	13,420	14,091	14,795	15,535	5,898.78	6,193.72	6,503.40	6,828.57	7,170.00	73.73	77.42	81.29	85.36	89.63
61	157,202	165,063	173,316	181,981	191,081	13,100	13,755	14,443	15,165	15,923	6,046.25	6,348.56	6,665.99	6,999.29	7,349.25	75.58	79.36	83.32	87.49	91.87
62	161,133	169,189	177,649	186,531	195,858	13,428	14,099	14,804	15,544	16,321	6,197.40	6,507.27	6,832.64	7,174.27	7,532.98	77.47	81.34	85.41	89.68	94.16
63	165,161	173,419	182,090	191,194	200,754	13,763	14,452	15,174	15,933	16,730	6,352.34	6,669.96	7,003.45	7,353.63	7,721.31	79.40	83.37	87.54	91.92	96.52
64	169,290	177,754	186,642	195,974	205,773	14,107	14,813	15,554	16,331	17,148	6,511.15	6,836.71	7,178.54	7,537.47	7,914.34	81.39	85.46	89.73	94.22	98.93
65	173,522	182,198	191,308	200,874	210,917	14,460	15,183	15,942	16,739	17,576	6,673.93	7,007.62	7,358.00	7,725.90	8,112.20	83.42	87.60	91.98	96.57	101.40
66	177,860	186,753	196,091	205,895	216,190	14,822	15,563	16,341	17,158	18,016	6,840.77	7,182.81	7,541.95	7,919.05	8,315.00	85.51	89.79	94.27	98.99	103.94
67	182,307	191,422	200,993	211,043	221,595	15,192	15,952	16,749	17,587	18,466	7,011.79	7,362.38	7,730.50	8,117.03	8,522.88	87.65	92.03	96.63	101.46	106.54
68	186,864	196,208	206,018	216,319	227,135	15,572	16,351	17,168	18,027	18,928	7,187.09	7,546.44	7,923.77	8,319.95	8,735.95	89.84	94.33	99.05	104.00	109.20
69	191,536	201,113	211,168	221,727	232,813	15,961	16,759	17,597	18,477	19,401	7,366.77	7,735.10	8,121.86	8,527.95	8,954.35	92.08	96.69	101.52	106.60	111.93
70	196,324	206,141	216,448	227,270	238,633	16,360	17,178	18,037	18,939	19,886	7,550.94	7,928.48	8,324.91	8,741.15	9,178.21	94.39	99.11	104.06	109.26	114.73
71	201,232	211,294	221,859	232,952	244,599	16,769	17,608	18,488	19,413	20,383	7,739.71	8,126.69	8,533.03	8,959.68	9,407.66	96.75	101.58	106.66	112.00	117.60
72	206,263	216,576	227,405	238,775	250,714	17,189	18,048	18,950	19,898	20,893	7,933.20	8,329.86	8,746.35	9,183.67	9,642.86	99.17	104.12	109.33	114.80	120.54
73	211,420	221,991	233,090	244,745	256,982	17,618	18,499	19,424	20,395	21,415	8,131.53	8,538.11	8,965.01	9,413.26	9,883.93	101.64	106.73	112.06	117.67	123.55
74	216,705	227,541	238,918	250,863	263,407	18,059	18,962	19,910	20,905	21,951	8,334.82	8,751.56	9,189.14	9,648.60	10,131.03	104.19	109.39	114.86	120.61	126.64
75	222,123	233,229	244,891	257,135	269,992	18,510	19,436	20,408	21,428	22,499	8,543.19	8,970.35	9,418.87	9,889.81	10,384.30	106.79	112.13	117.74	123.62	129.80
76	227,676	239,060	251,013	263,563	276,742	18,973	19,922	20,918	21,964	23,062	8,756.77	9,194.61	9,654.34	10,137.06	10,643.91	109.46	114.93	120.68	126.71	133.05
77	233,368	245,036	257,288	270,153	283,660	19,447	20,420	21,441	22,513	23,638	8,975.69	9,424.47	9,895.70	10,390.48	10,910.01	112.20	117.81	123.70	129.88	136.38
78	239,202	251,162	263,720	276,906	290,752	19,934	20,930	21,977	23,076	24,229	9,200.08	9,660.09	10,143.09	10,650.24	11,182.76	115.00	120.75	126.79	133.13	139.78
79	245,182	257,441	270,313	283,829	298,020	20,432	21,453	22,526	23,652	24,835	9,430.08	9,901.59	10,396.67	10,916.50	11,462.33	117.88	123.77	129.96	136.46	143.28
80	251,312	263,877	277,071	290,925	305,471	20,943	21,990	23,089	24,244	25,456	9,665.84	10,149.13	10,656.58	11,189.41	11,748.88	120.82	126.86	133.21	139.87	146.86
81	257,595	270,474	283,998	298,198	313,108	21,466	22,540	23,666	24,850	26,092	9,907.48	10,402.86	10,923.00	11,469.15	12,042.61	123.84	130.04	136.54	143.36	150.53
82	264,034	277,236	291,098	305,653	320,935	22,003	23,103	24,258	25,471	26,745	10,155.17	10,662.93	11,196.07	11,755.88	12,343.67	126.94	133.29	139.95	146.95	154.30
83	270,635	284,167	298,375	313,294	328,959	22,553	23,681	24,865	26,108	27,413	10,409.05	10,929.50	11,475.98	12,049.77	12,652.26	130.11	136.62	143.45	150.62	158.15
84	277,401	291,271	305,835	321,126	337,183	23,117	24,273	25,486	26,761	28,099	10,669.27	11,202.74	11,762.87	12,351.02	12,968.57	133.37	140.03	147.04	154.39	162.11

**Housing Authority County of Santa Cruz
Appendix III: Proposed Salary Plan
January 2024**

Salary Range	Annually					Monthly					Per Pay Period					Hourly				
	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5
85	284,336	298,553	313,481	329,155	345,612	23,695	24,879	26,123	27,430	28,801	10,936.01	11,482.81	12,056.95	12,659.79	13,292.78	136.70	143.54	150.71	158.25	166.16
86	291,445	306,017	321,318	337,384	354,253	24,287	25,501	26,776	28,115	29,521	11,209.41	11,769.88	12,358.37	12,976.29	13,625.10	140.12	147.12	154.48	162.20	170.31
87	298,731	313,667	329,351	345,818	363,109	24,894	26,139	27,446	28,818	30,259	11,489.64	12,064.12	12,667.33	13,300.70	13,965.73	143.62	150.80	158.34	166.26	174.57
88	306,199	321,509	337,584	354,464	372,187	25,517	26,792	28,132	29,539	31,016	11,776.88	12,365.73	12,984.01	13,633.21	14,314.87	147.21	154.57	162.30	170.42	178.94
89	313,854	329,547	346,024	363,325	381,491	26,154	27,462	28,835	30,277	31,791	12,071.30	12,674.87	13,308.61	13,974.04	14,672.75	150.89	158.44	166.36	174.68	183.41
90	321,700	337,785	354,675	372,408	391,029	26,808	28,149	29,556	31,034	32,586	12,373.09	12,991.74	13,641.33	14,323.39	15,039.56	154.66	162.40	170.52	179.04	187.99
91	329,743	346,230	363,541	381,718	400,804	27,479	28,852	30,295	31,810	33,400	12,682.41	13,316.53	13,982.36	14,681.48	15,415.55	158.53	166.46	174.78	183.52	192.69
92	337,986	354,886	372,630	391,261	410,825	28,166	29,574	31,052	32,605	34,235	12,999.47	13,649.45	14,331.92	15,048.52	15,800.94	162.49	170.62	179.15	188.11	197.51
93	346,436	363,758	381,946	401,043	421,095	28,870	30,313	31,829	33,420	35,091	13,324.46	13,990.68	14,690.22	15,424.73	16,195.97	166.56	174.88	183.63	192.81	202.45
94	355,097	372,852	391,494	411,069	431,622	29,591	31,071	32,625	34,256	35,969	13,657.57	14,340.45	15,057.47	15,810.35	16,600.87	170.72	179.26	188.22	197.63	207.51
95	363,974	382,173	401,282	421,346	442,413	30,331	31,848	33,440	35,112	36,868	13,999.01	14,698.96	15,433.91	16,205.61	17,015.89	174.99	183.74	192.92	202.57	212.70
96	373,074	391,727	411,314	431,879	453,473	31,089	32,644	34,276	35,990	37,789	14,348.99	15,066.44	15,819.76	16,610.75	17,441.28	179.36	188.33	197.75	207.63	218.02
97	382,401	401,521	421,597	442,676	464,810	31,867	33,460	35,133	36,890	38,734	14,707.71	15,443.10	16,215.25	17,026.02	17,877.32	183.85	193.04	202.69	212.83	223.47
98	391,961	411,559	432,136	453,743	476,430	32,663	34,297	36,011	37,812	39,703	15,075.41	15,829.18	16,620.63	17,451.67	18,324.25	188.44	197.86	207.76	218.15	229.05
99	401,760	421,848	442,940	465,087	488,341	33,480	35,154	36,912	38,757	40,695	15,452.29	16,224.90	17,036.15	17,887.96	18,782.36	193.15	202.81	212.95	223.60	234.78
100	411,804	432,394	454,013	476,714	500,550	34,317	36,033	37,834	39,726	41,712	15,838.60	16,630.53	17,462.05	18,335.16	19,251.91	197.98	207.88	218.28	229.19	240.65
101	422,099	443,204	465,364	488,632	513,064	35,175	36,934	38,780	40,719	42,755	16,234.56	17,046.29	17,898.61	18,793.54	19,733.21	202.93	213.08	223.73	234.92	246.67
102	432,651	454,284	476,998	500,848	525,890	36,054	37,857	39,750	41,737	43,824	16,640.43	17,472.45	18,346.07	19,263.37	20,226.54	208.01	218.41	229.33	240.79	252.83



Appendix IV

Salary Range Placement Recommendations

Housing Authority County of Santa Cruz
Appendix IV: Proposed Range Placement Recommendations
January 2024

Class Title	Current Maximum Monthly Salary	% from Adjusted Top Monthly Median	Market Placement	Proposed Salary Range	Proposed Maximum Monthly Salary	Percent Difference	Study Benchmark	Rationale
Executive Director	\$20,894	-16.1%	\$24,253	78	\$24,229	16.0%	X	Market and range placement.
Deputy Executive Director	\$17,149	-1.6%	\$17,422	70	\$19,886	16.0%	X	Internal alignment: 20% below the Executive Director.
Director of Operations	\$15,925			64	\$17,148	7.7%		Internal alignment: 15% below the Deputy Executive Director
Finance Director	\$15,157	2.1%	\$14,845	60	\$15,535	2.5%	X	Internal alignment: 10% below the Director of Operations
Administrative Services Director	\$13,732	-5.7%	\$14,517	57	\$14,426	5.1%	X	Market and range placement.
Property Management & Client Services Director	\$13,732	2.4%	\$13,406	57	\$14,426	5.1%	X	Internal alignment: anchor to the Administrative Services Director
Housing Program Director	\$13,732	2.7%	\$13,364	57	\$14,426	5.1%	X	Internal alignment: anchor to the Administrative Services Director
Assistant Finance Director	\$11,552	-15.8%	\$13,382	54	\$13,396	16.0%	X	Market and range placement.
Principal Management Analyst	\$11,270	0.7%	\$11,192	50	\$12,136	7.7%	X	Internal alignment: 15% above Senior Administrative Analyst
Controller	\$10,995			50	\$12,136	10.4%		Internal alignment: 10% below Assistant Finance Director
Administrative Services Assistant Director	\$10,210			47	\$11,269	10.4%		Internal alignment: 25% below Administrative Services Director
Human Resources Director (was Mgr/Dir)	\$12,137			47	\$11,269	-7.1%		Internal alignment: 5% below Administrative Services Assistant Dir
Senior Data Analyst	\$10,210			47	\$11,269	10.4%		Internal alignment: 10% above Data Analyst
Property Management Assistant Director	\$10,210	Insuff. Data		47	\$11,269	10.4%	X	Internal alignment: 25% below Property Management & CS Dir
Housing Programs Assistant Director	\$10,210			47	\$11,269	10.4%		Internal alignment: 25% below Housing Program Director
Senior Administrative Analyst	\$10,210			44	\$10,465	2.5%		Internal alignment: 10% above Administrative Analyst
Data Analyst	\$8,804	-14.6%	\$10,090	43	\$10,210	16.0%	X	Market and range placement.
Facilities Manager	\$8,804	-15.1%	\$10,132	43	\$10,210	16.0%	X	Market and range placement.
Administrative Analyst	\$8,804	-8.1%	\$9,518	40	\$9,481	7.7%	X	Market and range placement.
Administrative Services Supervisor	\$8,176	-13.8%	\$9,307	39	\$9,249	13.1%	X	Market and range placement.
Housing Program (Specialist) Supervisor	\$8,176	-14.4%	\$9,357	39	\$9,249	13.1%	X	Market and range placement.
Senior Accountant	\$9,024			38	\$9,024	0.0%		Internal alignment: 10% above Accountant
Accountant	\$7,976	-3.7%	\$8,270	34	\$8,175	2.5%	X	Market and range placement.
Executive Secretary	\$6,878	-13.6%	\$7,810	32	\$7,781	13.1%	X	Market and range placement.
Program Integrity Specialist	\$7,592	1.2%	\$7,502	32	\$7,781	2.5%	X	Internal alignment: 5% above Senior Housing Program Specialist
Maintenance Coordinator	\$7,226			31	\$7,591	5.1%		Internal alignment: 20% above Maintenance Worker II
Senior Housing Program Specialist	\$6,710			30	\$7,406	10.4%		Internal alignment: 10% above Housing Program Specialist
Leasing Specialist	\$6,547	0.8%	\$6,496	28	\$7,049	7.7%	X	Internal alignment: 5% above Housing Program Specialist
Client Services Coordinator	\$6,547	5.2%	\$6,208	28	\$7,049	7.7%	X	Internal alignment: 5% above Housing Program Specialist
Property Management Specialist	\$6,547	7.2%	\$6,075	28	\$7,049	7.7%	X	Internal alignment: 5% above Housing Program Specialist
Family Self Sufficiency Coordinator	\$6,079	0.8%	\$6,031	26	\$6,710	10.4%	X	Internal alignment: anchor to Housing Program Specialist
Housing Program Specialist	\$6,079	-9.5%	\$6,659	26	\$6,710	10.4%	X	Market and range placement.
Accounting Specialist (was Sr Acct Tech)	\$6,710	5.5%	\$6,338	26	\$6,710	0.0%	X	Internal alignment: 20% below Accountant
Housing Inspector	\$6,231	-4.5%	\$6,510	25	\$6,546	5.1%	X	Market and range placement.
Maintenance Worker II	\$5,931	-6.4%	\$6,312	24	\$6,386	7.7%	X	Market and range placement.
Administrative Clerk IV	\$5,786			22	\$6,079	5.1%		Internal alignment: 10% above Administrative Clerk III
Accounting Technician	\$6,079			22	\$6,079	0.0%		Internal alignment: 10% below Accounting Specialist
Maintenance Worker I	\$5,242			20	\$5,786	10.4%		Internal alignment: 10% below Maintenance Worker
Administrative Clerk III	\$5,242	-5.3%	\$5,518	18	\$5,507	5.1%	X	Market and range placement.
Account Clerk II	\$5,114			16	\$5,242	2.5%		Internal alignment: 10% below Accounting Technician
Administrative Clerk II	\$4,749	-5.2%	\$4,994	14	\$4,989	5.1%	X	Market and range placement.
Account Clerk I				12	\$4,749			Internal alignment: 10% below Account Clerk II
Administrative Clerk I	\$4,302			10	\$4,520	5.1%		Internal alignment: 10% below Administrative Clerk II

Housing Authority County of Santa Cruz
Appendix IV: Proposed Range Placement Recommendations
January 2024

Class Title	Current Maximum Monthly Salary	% from Adjusted Top Monthly Median	Market Placement	Proposed Salary Range	Proposed Maximum Monthly Salary	Percent Difference	Study Benchmark	Rationale
Receptionist	\$4,749			10	\$4,520	-4.8%		Internal alignment: anchor to Administrative Clerk I

Legend for columns:

- Column A - Classification Title.
- Column B - Client's current monthly maximum salaries.
- Column C - The % difference between current monthly maximum salaries and the adjusted median top monthly market values derived from the compensation survey results.
- Column D - Market placement shows the monthly market values derived from the total compensation survey results.
- Column E - Salary range number of the consultant's newly proposed salary range schedule.
- Column F - Monthly maximum salary of the consultant's newly proposed salary ranges.
- Column G - This percentage expresses the difference between the client's current salaries and the consultant's proposed salaries.
- Column H - This column indicates if the classification was surveyed as a study benchmark.
- Column I - The rationale expresses how the consultant arrived at each proposed maximum monthly salary recommendation (i.e., the proposed range placement within the newly proposed salary range schedule).

MEETING DATE: May 22, 2024

ITEM NUMBER: 3E

FROM: Executive Director

SUBJECT: Housing Authority Fiscal Year 2023/2024 Agency Goals – Quarter 3 Report

RECOMMENDATION: Receive Report

BACKGROUND SUMMARY:

Each year, the Housing Authority Board of Commissioners establishes annual performance goals for the Agency. The following goals were established for the period of 7/1/2023 – 6/30/2024. The target date for completion of all goals is 6/30/2024 unless otherwise stated. This report demonstrates the progress on these goals during the first three quarters of the fiscal year, from 7/1/23 – 3/30/23. Baseline values reflect the values on 7/1/23, at the beginning of the fiscal year.

1. Expand Housing Choice Voucher Program:

a. Achieve/Maintain voucher utilization rates of at least 97% for HCV program:

	Baseline	Q1	Q2	Q3	Q4
HCV Utilization Rate	95.2%	95.6%	94.7%	96.1%	

b. Issue or Commit 100% of all new Stability Vouchers (41 vouchers):

HUD has awarded HACSC with 41 Stability Vouchers for individuals and families experiencing homelessness. The program was designed to build on the success of the EHV program, using the same program model with the County Continuum of Care (CoC) providing referrals of eligible households and providing supportive services and rental search assistance to households, and with the Housing Authority issuing the vouchers and providing the rental assistance. The effective date of the program was September 1, 2023. The Housing Authority and CoC executed our MOU in October 2023, and finalized referral forms and materials in December 2023. The Housing Authority began receiving referrals in March 2024. Ten (10) Stability Vouchers have been issued to date. We expect to issue all 41 Stability Vouchers by the end of the fiscal year as planned.

c. Increase total number of households assisted by at least 150 households:

	Baseline	Q1	Q2	Q3	Q4
HCV Households	5,259	5,288	5,317	5,355	
Cumulative Increase	N/A	+29	+58	+96	

The total number of households participating in the program has not increased as quickly as anticipated, primarily as a result of delays in several PBV projects, including Park Haven Plaza, Bienestar and Tabasa Gardens. While Bienestar and Tabasa Gardens are currently in the process of leasing up, Park Haven Plaza will not be ready for occupancy this fiscal year as planned.

d. Increase number of landlords participating in the HCV program by at least 40:

	Baseline	Q1	Q2	Q3	Q4
HCV Landlords	1,923	1,926	1,948	1,952	
Cumulative Increase	N/A	+3	+25	+29	

2. Expand Affordable Housing Supply:

a. Project Based Vouchers approved for at least 75 additional units, with a priority for, and at least 50% of these units available to, top HCV applicants:

Between July 2023 and March 2024, the Housing Authority conditionally awarded one hundred eight (108) project-based vouchers (PBVs). These PBVs were conditionally awarded across five (5) projects. Nine (9) of the PBVs were conditionally awarded to a project that had already received a conditional allocation of forty-two (42). This project re-applied for an additional award and was conditionally awarded the extra nine (9) vouchers to bring the project up to the Standard Project Cap. All one hundred eight (108) of these conditionally awarded PBVs are designated for top HCV applicants. These projects will create a total of two hundred ninety-five (295) new affordable housing units to our community.

Project Based Vouchers Awarded Fiscal Year to Date

Project Name & Address	Developer / Owner	Jurisdiction	Type of PBV Proposal	PBVs Awarded	Total Units & Affordable Units	% of PBV Units for Top HCV WL Applicants
Pacific Station North – 902 Pacific Ave, Santa	Eden Housing	City of Santa Cruz	New Construction	9 <i>additional</i> vouchers	128 total 126 affordable	78%

Cruz						
Baler Place – 340 Bridgevale Rd, Hollister	CRP Affordable	County of San Benito	New Construction	25	54 total 53 affordable	100%
Westside Village – 850 Almar Ave, Santa Cruz	CRP Affordable	City of Santa Cruz	New Construction	25	42 total 41 affordable	100%
Capitola Manor – 1098 38th Ave, Capitola	MidPen Housing	City of Capitola	New Construction	25	52 total 51 affordable	100%
Beverly Gardens – 4444 Scotts Valley Drive, Scotts Valley	CRP Affordable	City of Scotts Valley	New Construction	24	25 total 24 affordable	100%

b. Construction of 415 Natural Bridges Drive, with an estimated completion in Fall 2024:

Exterior and interior work to continue at the site. Exterior work includes pipe installation for the joint trench and water line installation. PG&E inspection of the joint trench occurred this week and backfill of the trench is imminent. Interior electrical and plumbing finishes were installed, and the installation of kitchen cabinets is ongoing. Upcoming interior work includes installation of countertops, closet doors, and interior flooring. We continue to work with architects, engineers, and PG&E on coordinating permanent electricity to the site and are pending a date from PG&E. Tenant occupancy is scheduled for Fall 2024

c. Pursue opportunities to engage in real estate activities which include the acquisition, development, disposition, and financing of affordable housing, consistent with strategies approved by the Board of Commissioners:

As an agency operating under the MTW program, we have the opportunity to make the most of our HCV renewal funding by allocating any surplus year-end HCV reserve funds toward development activities. HUD approved and released funds associated with our request to commit

\$8M in CY23 HAP reserves for the development of Natural Bridges Apartments. This preserves the balance of our former public housing reserves for a potential future acquisition and/or development project in CY24. Staff presented the Board with information on one potential development project, and we plan to work with the Board to identify other potential site opportunities in the coming months. The Housing Authority has entered a contract with a real estate broker to help staff identify and evaluate site feasibility for the acquisition and development of real estate. Staff have engaged in a series of meetings with local government agencies and departments which include staff from the County, City of Capitola, City of Watsonville and the City of Santa Cruz on acquisition and development opportunities. These meetings presented several compelling leads in which staff are actively coordinating follow-up meetings with owners and other stakeholders. The Housing Authority’s appeal to HUD related to our set-aside application was successful and HUD provide notice of our eligibility on May 8, 2024. We are awaiting notice of the award amount.

3. Expand Programs and Services:

a. Implement New Horizons Programs and Services Year Two activities: Below is a summary of progress on implementation of New Horizons Programs and Services.

Program / Service	Progress Report
Mediation Services	The resident needs survey conducted in 2021 identified tenant landlord mediation services as a valuable service that would be of benefit to both landlords and tenants. During Q3, New Horizons executed a contract with the Conflict Resolution Center (CRC) of Santa Cruz County. The one-year contract provides Housing Authority participants and landlords with free access to mediation services to settle disputes and avoid court filings. The Housing Authority is currently promoting the program and will be working with CRC to evaluate and report on mediations performed.
Tenant and Landlord Workshops	During Q1, the Housing Authority promoted a tenant’s rights workshop that was presented by California Rural Legal Assistance (CRLA) and Housing and Economic Rights Advocates (HERA). This workshop focused on tenant’s right to a habitable home and covered the basics of the unlawful detainer process. More recently, The Housing Authority has worked with Housing Santa Cruz County and other partners to organize and promote two events during Q4 to celebrate Affordable Housing Month. The first event, on May 8, a housing discrimination forum featured presentations by CRLA and Senior Legal and a panel discussion along with Conflict Resolution Center and Tenant Sanctuary. The event was attended by over 50 attendees. The second event,

	<p>scheduled on May 14, in partnership with the County Housing for Health Division and the non-profit Abode Services, is a landlord appreciation event designed to celebrate and recognize landlords participating in the Housing Choice Voucher Program. Additionally, during Q4, the Housing Authority is planning a landlord workshop focusing on landlord rights and responsibilities.</p>
Internet Service	<p>30th Ave completed its Cruzio installation during Q3 and is now connected to the Equal Access Program. 124 Housing Authority owned units now have the option to participate in the Equal Access Program with 93 units being active users. The Housing Authority and Cruzio are continuing to promote the Equal Access Program and increase adoption rates. During Q4, the Housing Authority plans to partner with Cruzio and apply for the California Advanced Services Fund (CASF) Public Housing Account. This funding opportunity would expand free internet service by providing funds to install Cruzio's service on the remaining 13 Housing Authority owned sites. The Housing Authority plans to submit the CASF application by July 2024.</p>
Transportation Services	<p>The Housing Authority is currently partnering with Santa Cruz METRO to offer transit passes to residents of Housing Authority owned and controlled properties. The EcoPass Pilot provides the Housing Authority with a discounted rate of 90% off the regular fare. As part of the program the Housing Authority has agreed to cover the rider portion of the pass cost to provide free bus transportation passes to residents at Housing Authority owned and controlled properties. After executing a one-year contract with Santa Cruz METRO, the Housing Authority began offering free METRO passes to residents in July. The one-year pilot program will run through the end of June 2024. Residents all received individual flyers and notification of the program benefits and how to obtain a pass. As of the end of Q3, a total of 25 METRO passes have been distributed to residents. The Housing Authority will continue to promote the program and attempt to increase rates of participation.</p> <p>The Housing Authority recently engaged METRO to review terms and cost structure of the existing contract and to discuss options for tenants upon contract expiration. The Housing Authority is interested in bridging existing participants into METRO's plans for a fare free rider program.</p>
Resident Survey	<p>The Housing Authority has partnered with Zilo International Group, to complete a stakeholder survey. The final survey report was issued to the Housing Authority during Q3. The survey results are being analyzed</p>

	across the three distinct client groups: Group 1) housing choice voucher participants, Group 2) residents of Housing Authority owned or controlled properties, and Group 3) property owners and property managers that are currently actively renting to voucher holders. The survey results will be used to guide the development and improvement of New Horizons programs and services and to improve overall agency operations.
Loss Mitigation Funds	During the third quarter of FY24 there were 3 claims approved and paid to landlords. Disbursement figures for these claims totaled \$5,890 for Q3 and \$20,899 YTD with \$29,101 in funds remaining. The goals of this program are to improve landlord satisfaction and to retain units available to participants.
Security Deposit Gap Assistance	This program continues to be available to new residents of New Horizon properties, if and when jurisdictional security deposit funding has been depleted. Currently, jurisdictional funding is available countywide for security deposit assistance. Therefore, during the first, second and third quarters of FY24 there were no funds disbursed for this program.
Publications	Residents received our first Newsletter in July of this year and the second newsletter was released during Q3 in February. New Horizons plans to release their next newsletter at the beginning of June, 2024. In addition to the newsletters, the Housing Authority is progressively updating and enhancing the materials provided in the resident Move-In Packets.
Waiting List Alert System	As of April 2024, there were 3,126 registrants that have signed up for alerts. The Housing Authority has sent multiple notices of housing opportunities, including notification of open waitlists at Lincoln Square Apartments, Pacifica Apartments, Sunrise Senior Apartments, Bienestar , a new construction homeownership for three units in Scotts Valley and Paloma Del Mar.

b. Develop and implement MTW Asset Building Program:

The Savings for YOU Program (formerly Opt-Out Savings Program) continued its rollout this quarter. Staff outreach efforts through mailings, emails, and phone calls resulted in 52 program participants by mid-February. While 23 selected individuals opted out due to concerns about potential impacts on other benefits and various other reasons, the remaining participants received their initial \$120 deposit March 1, 2024 followed by regularly scheduled \$100 monthly deposits.

Our key partnership with Ventures was solidified through a two-year agreement executed January 11, 2024. This collaboration provides participants with financial education through four in-person

and four virtual workshops focused on culturally appropriate asset-building strategies for families. Most recently, all workshops have been scheduled between June 2024 and May 2025. Additionally, Ventures offers one-on-one coaching with Ventures staff experienced in financial capabilities and overcoming economic barriers. To foster a sense of community, a bi-lingual Savings for YOU Program event was held March 27 at the Capitola Library and approximately 30% of participants attended. Attendees had the opportunity to meet Ventures staff, ask questions, and get a preview of the upcoming workshops and coaching sessions.

HUD contracted with Abt Associates Inc. (“Abt”) to conduct a research study to evaluate the effectiveness of the Moving to Work (MTW) Expansion Asset Building Cohort: Opt-Out Savings Program.

With enrollment complete, initial funding deposited, and the partnership with Ventures underway, the Savings for YOU Program is poised to make a positive impact on participants' asset-building and financial well-being.

4. Improve Agency and Program Management:

- a. Implement the MTW alternative re-examination waiver and maintain timely re-examination rate of at least 98%.**

The MTW re-examination waiver has been implemented and is currently in place. Staff have made significant progress in working towards increasing the percentage of timely re-examinations. The waiver changes the re-examination schedule so that fixed income households receive a re-examination every three years, and all other households receive a re-examination every two years.

	Baseline	Q1	Q2	Q3	Q4
Percentage of Timely Reexaminations	97%	97%	98%	99%	

- b. Implement (soft) launch of web-based waiting list portal:**

The waitlist portal is live on the website for open waitlists allowing applicants to apply on-line as well as update their contact information and preferences. Staff will be conducting a waitlist purge of the Merrill waitlist utilizing the applicant portal in the month of April with plans to purge USDA and the remaining small waitlists before the end of summer. Staff are setting up laptops in the lobby for client use to access their applicant or tenant portal to allow clients to complete simple transactions, watch briefing videos, and access the Housing Authority website.

RECOMMENDATION: Receive report

AGENDA ITEM SUMMARY

MEETING DATE: May 22, 2024

ITEM NUMBER: 6A

FROM: Executive Director

SUBJECT: Agency Budget for FY 2024-2025

RECOMMENDATION: Resolution 2024-03: Adopting the Fiscal Year 2024-2025 Agency Budget

BACKGROUND SUMMARY:

We are pleased to present the proposed FY2024-2025 budget for the Housing Authority of the County of Santa Cruz. Of the Agency's five program groups listed on page 19 (Section 8, Federal Housing, Federal Grants, Local Programs, and Business Activities), none of the program groups have anticipated budget deficits for the coming year. It's a positive sign for the Agency's revenue sources to align with each program's financial need since surplus funding is generally restricted for the sole benefit of a given program and cannot be used to supplement funding deficits in other program areas with the exception of Moving-to-Work (MTW) fungibility.

The Business Activities program group (Page 40) and Section 8 program group (Page 22) are projected to generate the majority of the overall Agency-wide surplus of \$818,569. The \$604,990 surplus for the Business Activities program group is a result of the commercial rental income generated by the Authority owned buildings on Mission Street and 41st Avenue and serves as a fully unrestricted source of revenue.

The Section 8 program group includes the Housing Choice Voucher Program, Emergency Housing Vouchers, Mainstream Vouchers, and Moderate Rehabilitation units. The Agency's budget reflects a steady monthly increase in the lease up in large part from new project-based voucher developments which are anticipated to result in a projected lease up rate of almost 98% with 5,732 households receiving assistance by the end of the upcoming fiscal year.

The quarterly voucher program lease up goals and the corresponding HAP are listed in the table below:

	Sept 2024	Dec 2024	Mar 2025	Jun 2025
Unit Count	5,638	5,652	5,718	5,732
HAP	\$ 11,890,891	\$ 12,170,913	\$ 12,519,191	\$ 13,156,010

Section 8 admin fees provide the majority of the Agency's overall administrative funding. A monthly per unit admin fee is earned for every family that is housed. For the past few years, HUD has increased the per unit admin fee by a higher factor than in earlier years to coincide with higher overall inflation. The per unit admin fee rates for calendar 2024 have not yet been released by HUD so the budget includes a conservative estimate which aligns with national and local inflation levels.

Admin fee funding is also impacted by admin fee proration levels which reduce the full per unit admin fee funding that HUD has historically used as the benchmark level of funding for housing authorities to efficiently operate a voucher program. The proposed budget was prepared using an admin fee proration level of 93% for the first 6 months of the budget year based on HUD's guidance and a very conservative 85% for the second half of the fiscal year. Please refer to the chart on page 5 for historical admin fee proration levels. Even slight changes to the admin fee proration level can have a significant impact on the Agency's ability to cover the administrative costs of operating the voucher programs. For this reason, the Agency strives to generate a budget surplus in the Section 8 program group on an annual basis to create admin fee reserves that can be drawn upon during years with budget deficits when admin fee prorations are especially severe. The proposed budget forecasts a surplus of \$205,725 for the Section 8 program group.

Moving-To-Work (MTW) reserves for the calendar year 2024 funding cycle are estimated to be roughly \$12 million which is the portion of excess HCV funding that remains after addressing HAP related expenditures. These proceeds can be used for development activity as a result of the agency's MTW funding flexibility. In addition to the MTW reserves, development activity can also be funded by the pending MTW set-aside funds which HUD has approved and is in the process of finalizing. And lastly, \$6.2 million of the former public housing reserves have also been earmarked for development related expenditures. These funding sources offer tremendous potential and opportunity as the agency expands its role as an affordable housing developer in the community.

The Federal Housing program group (Page 29) has a projected surplus of \$6,047 although Tierra Alta is bridging a major capital deficit by fully exhausting its reserves and also prompting a short-term loan of roughly \$1 million from the Housing Authority to fund the extensive wastewater system and domestic water system upgrades. With a PBV conversion in process to be implemented in the second half of the fiscal year, Tierra Alta's rental income will increase substantially which will enable repayment of the loan and the ability to replenish the capital reserves.

With anticipated increases in the Section 8 lease up rate, high admin fee proration levels, and robust unrestricted revenue sources from business activities, the Agency is in a favorable financial position to bring staff salaries in line with the market median levels at comparator agencies. As a result, the budget proposal includes full implementation of the salary recommendations in Appendix IV of the Base Salary Compensation Study Final Report produced by Koff and Associates and presented to the Board in the consent agenda, with one exception. The proposed salary for one position, the Accounting Specialist, reflects a top monthly step of \$7,407 instead of the compensation study market median of \$6,338. This recommendation is based on increased duties and a change to the job description that took place subsequent to the study. Overall, the full implementation of the salary comparability study would increase total personnel costs (salaries and benefits) by 5.9%.

RECOMMENDATION: Resolution 2024-03: Adopting the Fiscal Year 2024-2025 Agency Budget

**BEFORE THE HOUSING AUTHORITY OF THE COUNTY
OF SANTA CRUZ, STATE OF CALIFORNIA**

RESOLUTION NO. 2024-03

On the motion of Commissioner
Duly seconded by Commissioner

The Following Resolution is Adopted:

**RESOLUTION NO. 2024-03 ADOPTING THE FISCAL YEAR 2024-
2025 AGENCY BUDGET FOR THE HOUSING AUTHORITY OF
THE COUNTY OF SANTA CRUZ**

WHEREAS, The Housing Authority of the County of Santa Cruz, in accordance with the Regulations of the United States Department of Housing and Urban Development (HUD) prior to the beginning of its Fiscal Year, are required to prepare an Operating Budget, and;

WHEREAS, the Housing Authority of the County of Santa Cruz's Board of Commissioners must review and approve the budget by Resolution each fiscal year, and;

WHEREAS, the Housing Authority of the County of Santa Cruz must submit to HUD, in a time and manner prescribed by HUD by the approved Board Resolution.

NOW, THEREFORE, BE IT RESOLVED that the Agency Budget for Fiscal Year 2024-2025 for the Housing Authority of the County of Santa Cruz be approved.

PASSED AND ADOPTED by the Board of Commissioners of the Housing Authority of the County of Santa Cruz, State of California, on May 22, 2024, by the following vote:

AYES:

NOES:

ABSENT:

Chairperson of the Authority

ATTEST:

Secretary of the Authority



Executive Director

Jennifer Panetta

Finance Director

Aaron Pomeroy

Board of Commissioners

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Proposed Budget
2024-2025

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2024 - 2025
PROPOSED BUDGET

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BUDGET TERMS

TERM	DESCRIPTION	COMMENTS
Administrative Fees	Fees derived from contracts or services	Section 8 admin fees are earned on each HAP contract on the first of each month. Admin fees earned for other programs are received from services provided or derived from a fee schedule or composite labor rate.
Grants/Contracts	Funding from grants or contracts with various agencies to perform specific services.	Includes grant and contracts with local, state, and federal agencies
Rental Income	Rental Income on Housing Authority owned property	Dwelling rental income from HUD and USDA programs and non-dwelling rental income for Housing Authority owned buildings.
Operating Transfers In	Transfer of funds from one program or fund to another	Sources of Operating Transfers In are from reserves funds or funding from outside sources or funds.
Other Income	Income that does not conform to the other categories	Examples include laundry vending receipts, tenant charges for repairs, proceeds from repayment agreements, and interest income.
Housing Assistance Payments (HAPs)	Supplemental rent payments made directly to landlords on behalf of qualified low-income tenants	These are pass-through funds provided by the United States Department of Housing and Urban Development (HUD).
Salaries	Salaries for administrative and maintenance staff	
Employee Benefit Expenses	Payroll taxes and fringe benefits for long-term, permanent staff	Benefits: Health, dental, vision, retirement life, accidental death and dismemberment, short-term and long-term disability. Taxes: Medicare, and unemployment.
Capital Purchases	Equipment purchases and site or building improvements that meet the Agency's capitalization threshold.	These items are capitalized and depreciated over the term of their useful lives. Purchases not meeting the minimum threshold of \$5,000 are expensed when incurred.

BUDGET TERMS

TERM	DESCRIPTION	COMMENTS
Maintenance	Costs of maintenance and repair of buildings and equipment	Included in this category is the maintenance and repair of buildings, appliances, office equipment, service contracts, and utilities.
General Administrative	Items of administrative expense for which no specific account is prescribed in the other categories	Included in this category is the cost of most overhead expenses such as office supplies, postage, telephone, etc. Also includes legal fees, training, travel, audit fees, office lease payments, and insurance.
Tenant Services	Support services, landlord incentives, and security deposit assistance provided to low income participants through federal and local programs.	Includes services or participant assistance provided through contracts with various federal and local jurisdictions and services/programs administered by the HA staff.
Operating Transfers Out	Transfers from one program or fund to another.	Includes transfers to reserve accounts, loans to affiliated entities, and pre-funding of external pension accounts.
Debt Service	Includes principal and interest payments.	Notes are secured by the underlying properties.

BUDGET NARRATIVE

We are pleased to present the proposed FY2024-2025 budget for the Housing Authority of the County of Santa Cruz. Of the Agency’s five program groups listed on page 19 (Section 8, Federal Housing, Federal Grants, Local Programs, and Business Activities), none of the program groups have anticipated budget deficits for the coming year. It’s a positive sign for the Agency’s revenue sources to align with each program’s financial need since surplus funding is generally restricted for the sole benefit of a given program and cannot be used to supplement funding deficits in other program areas with the exception of Moving-to-Work (MTW) fungibility.

The Business Activities program group (Page 40) and Section 8 program group (Page 22) are projected to generate the majority of the overall Agency-wide surplus of \$818,569. The \$604,990 surplus for the Business Activities program group is a result of the commercial rental income generated by the Authority owned buildings on Mission Street and 41st Avenue and serves as a fully unrestricted source of revenue.

The Section 8 program group includes the Housing Choice Voucher Program, Emergency Housing Vouchers, Mainstream Vouchers, and Moderate Rehabilitation units. The Agency’s budget reflects a steady monthly increase in the lease up in large part from new project-based voucher developments which are anticipated to result in a projected lease up rate of almost 98% with 5,732 households receiving assistance by the end of the upcoming fiscal year.

The quarterly voucher program lease up goals and the corresponding HAP are listed in the table below:

	Sept 2024	Dec 2024	Mar 2025	Jun 2025
Unit Count	5,638	5,652	5,718	5,732
HAP	\$ 11,890,891	\$ 12,170,913	\$ 12,519,191	\$ 13,156,010

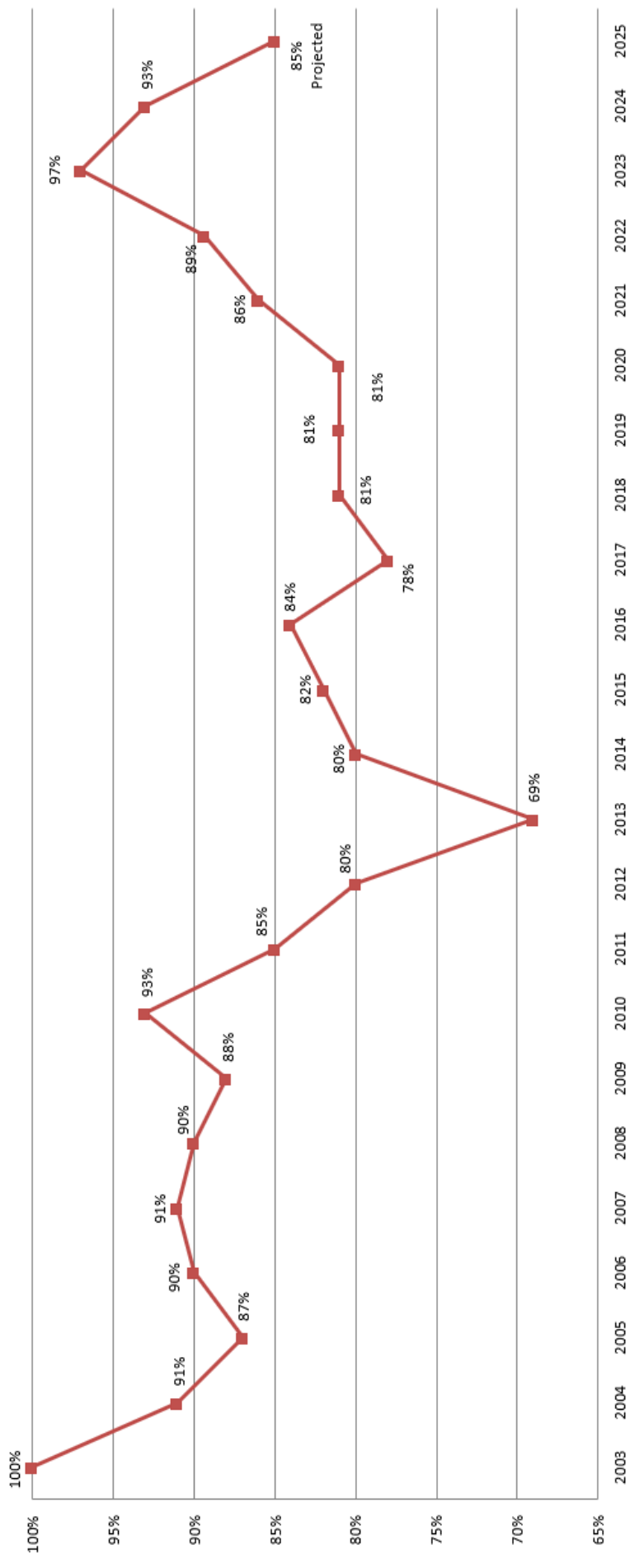
Section 8 admin fees provide the majority of the Agency’s overall administrative funding. A monthly per unit admin fee is earned for every family that is housed. For the past few years, HUD has increased the per unit admin fee by a higher factor than in earlier years to coincide with higher overall inflation. The per unit admin fee rates for calendar 2024 have not yet been released by HUD so the budget includes a conservative estimate which aligns with national and local inflation levels. Admin fee funding is also impacted by admin fee proration levels which reduce the full per unit admin fee funding that HUD has historically used as the benchmark level of funding for housing authorities to efficiently operate a voucher program. The proposed budget was prepared using an admin fee proration level of 93% for the first 6 months of the budget year based on HUD’s guidance and a very conservative 85% for the second half of the fiscal year. Please refer to the chart on page 5 for historical admin fee proration levels. Even slight changes to the admin fee proration level can have a significant impact on the Agency’s ability to cover the administrative costs of operating the voucher programs. For this reason, the Agency strives to generate a budget surplus in the Section 8 program group on an annual basis to create admin fee reserves that can be drawn upon during years with budget deficits when admin fee prorations are especially severe. The proposed budget forecasts a surplus of \$205,725 for the Section 8 program group.

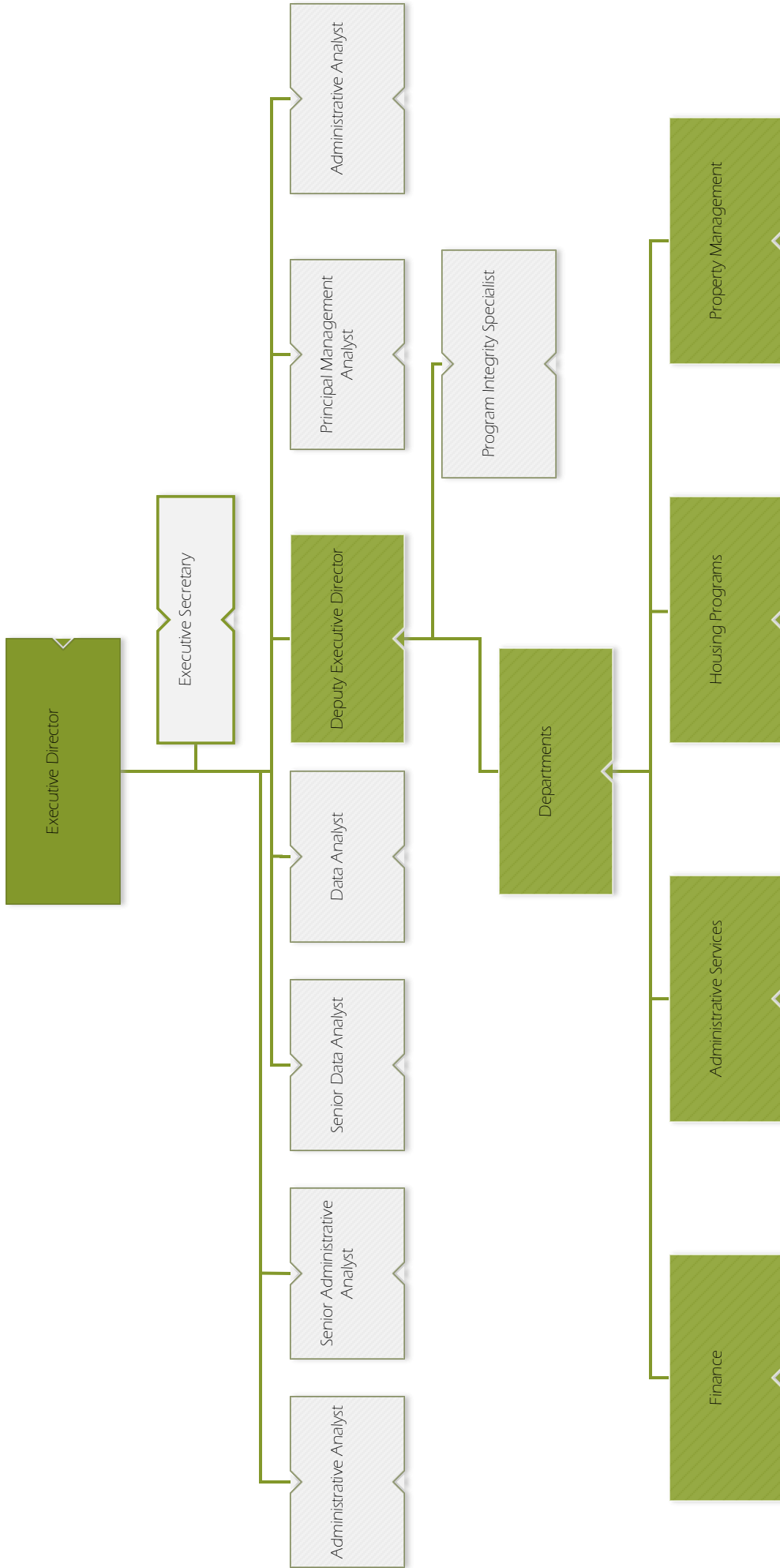
Moving-To-Work (MTW) reserves for the calendar year 2024 funding cycle are estimated to be roughly \$12 million which is the portion of excess HCV funding that remains after addressing HAP related expenditures. These proceeds can be used for development activity as a result of the agency's MTW funding flexibility. In addition to the MTW reserves, development activity can also be funded by the pending MTW set-aside funds which HUD has approved and is in the process of finalizing. And lastly, \$6.2 million of the former public housing reserves have also been earmarked for development related expenditures. These funding sources offer tremendous potential and opportunity as the agency expands its role as an affordable housing developer in the community.

The Federal Housing program group (Page 29) has a projected surplus of \$6,047 although Tierra Alta is bridging a major capital deficit by fully exhausting its reserves and also prompting a short-term loan of roughly \$1 million from the Housing Authority to fund the extensive wastewater system and domestic water system upgrades. With a PBV conversion in process to be implemented in the second half of the fiscal year, Tierra Alta's rental income will increase substantially which will enable repayment of the loan and the ability to replenish the capital reserves.

With anticipated increases in the Section 8 lease up rate, high admin fee proration levels, and robust unrestricted revenue sources from business activities, the Agency is in a favorable financial position to bring staff salaries in line with the market median levels at comparator agencies. As a result, the budget proposal includes full implementation of the salary recommendations in Appendix IV of the Base Salary Compensation Study Final Report produced by Koff and Associates and presented to the Board in the consent agenda, with one exception. The proposed salary for one position, the Accounting Specialist, reflects a top monthly step of \$7,407 instead of the compensation study market median of \$6,338. This recommendation is based on increased duties and a change to the job description that took place subsequent to the study. Overall, the full implementation of the salary comparability study would increase total personnel costs (salaries and benefits) by 5.9%.

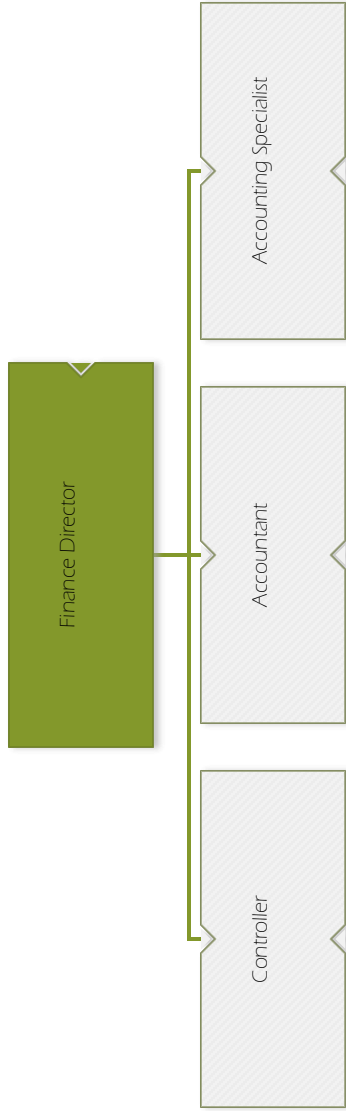
HCV Administrative Fee Prorations 2003-2025





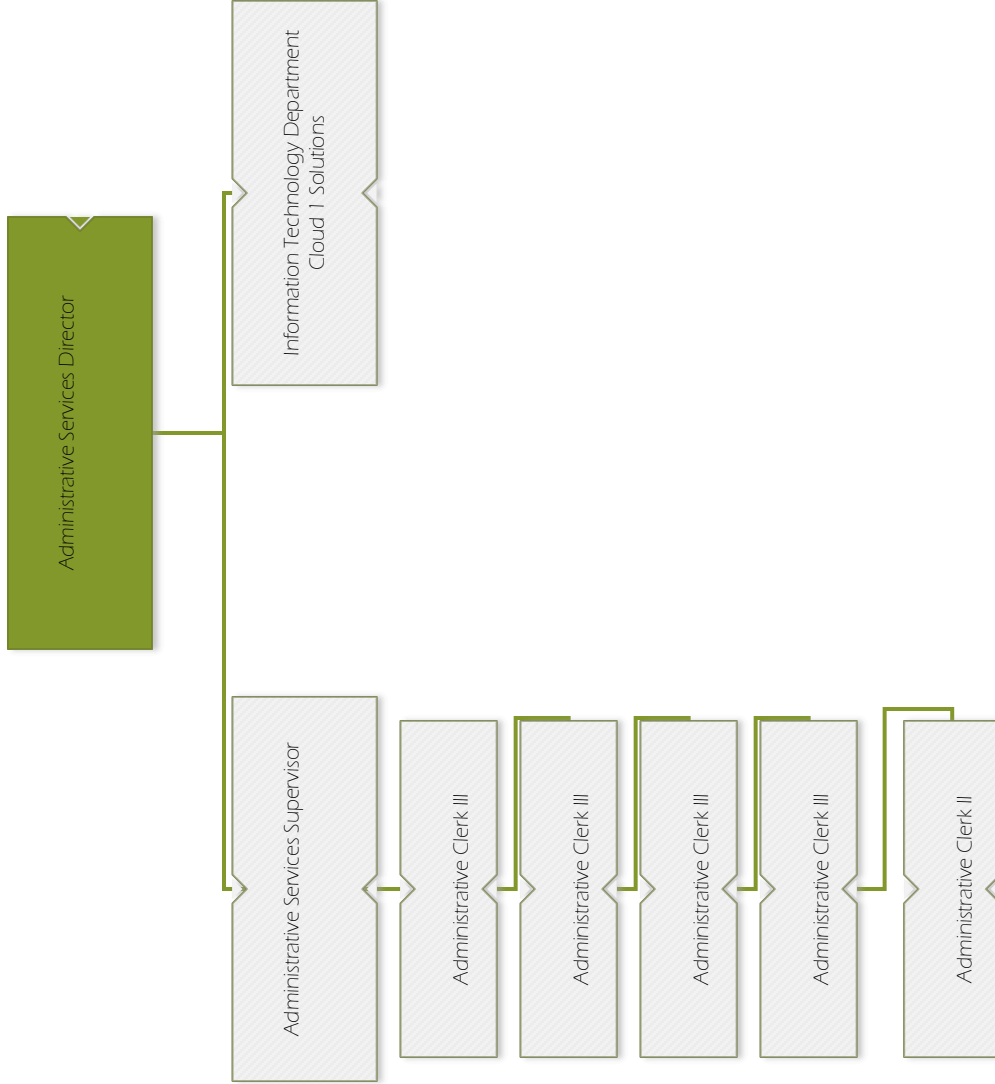


Finance Department





Administrative Services Department



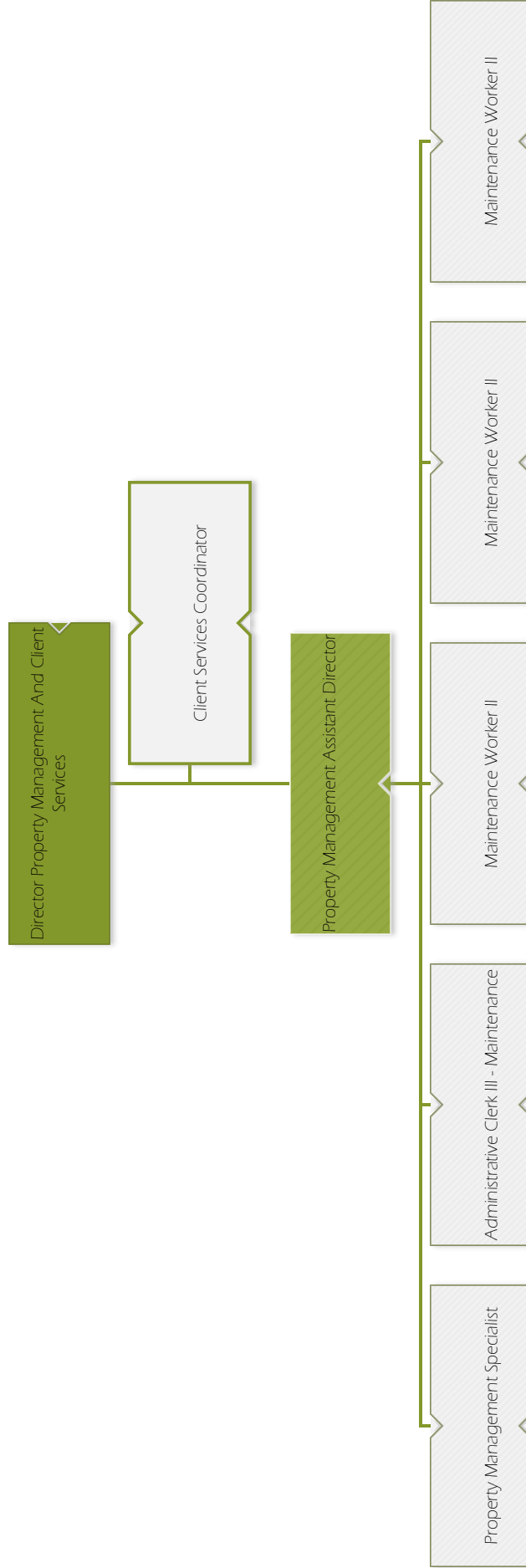


Housing Programs Department





Property Management Department



**Position Summary
2024-2025**

Administration	
Executive Director	1
Deputy Executive Director	1
Principal Management Analyst	1
Senior Data Analyst	1
Senior Administrative Analyst	1
Administrative Analyst	2
Data Analyst	1
Program Integrity Specialist	1
Executive Secretary	1

Property Management	
Director Property Management & Client Services	1
Property Management Assistant Director	1
Property Management Specialist	1
Client Services Coordinator	1
Maintenance Worker II	3
Administrative Clerk III - Maintenance	1
Total Positions (FTE)	61

Administrative Services	
Administrative Services Director	1
Administrative Services Supervisor	1
Administrative Clerk III	4
Administrative Clerk II	1

Finance Department	
Finance Director	1
Controller	1
Accountant	1
Accounting Specialist	1

Housing Programs Department	
Housing Programs Director	1
Housing Programs Assistant Director	1
Housing Programs Supervisor	3
Senior Housing Program Specialist	2
Leasing Specialist	2
Housing Inspector	1
Housing Programs Specialist	14
FSS Coordinator	2
Housing Assistant	6

Full Time Equivalents	
Executive Director	1
Deputy Executive Director	1
Department Director	4
Principal Management Analyst	1
Controller	1
Senior Data Analyst	1
Senior Administrative Analyst	1
Property Management Assistant Director	1
Housing Programs Assistant Director	1
Data Analyst	1
Administrative Analyst	2
Administrative Services Supervisor	1
Housing Programs Supervisor	3
Accountant	1
Program Integrity Specialist	1
Executive Secretary	1
Accounting Specialist	1
Senior Housing Program Specialist	2
Property Management Specialist	1
Client Services Coordinator	1
Leasing Specialist	2
Housing Inspector	1
Housing Programs Specialist	14
Family Self-Sufficiency Coordinator	2
Maintenance Worker II	3
Housing Assistant	6
Administrative Clerk III	4
Administrative Clerk III - Maintenance	1
Administrative Clerk II	1
TOTAL.....	61

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ
Staffing Comparison By Budget Year

			Change
	2023-24	2024-25	from
<u>Full Time Equivalent</u>s	<u>Budget</u>	<u>Budget</u>	<u>Last Yr</u>
Executive Director	1	1	0
Deputy Executive Director	1	1	0
Department Director	4	4	0
Principal Management Analyst	1	1	0
Controller	1	1	0
Senior Data Analyst	1	1	0
Senior Administrative Analyst	1	1	0
Property Management Assistant Dir	1	1	0
Housing Programs Assistant Director	1	1	0
Computer Technical Support Analyst	1	0	-1
Data Analyst	0	1	1
Administrative Analyst	2	2	0
Administrative Services Supervisor	1	1	0
Housing Programs Supervisor	3	3	0
Accountant	1	1	0
Program Integrity Specialist	1	1	0
Executive Secretary	1	1	0
Accounting Specialist	1	1	0
Senior Housing Program Specialist	0	2	2
Property Management Specialist	1	1	0
Client Services Coordinator	0	1	1
Leasing Specialist	1	2	1
Housing Inspector	1	1	0
Housing Programs Specialist	20	14	-6
Family Self-Sufficiency Coordinator	0	2	2
Maintenance Worker II	3	3	0
Housing Assistant	0	6	6
Administrative Clerk III	3	4	1
Administrative Clerk III - Maint	1	1	0
Administrative Clerk II	7	1	-6
TOTAL Full Time Equivalent s (FTE)	60	61	1.0

Salary Range/Step Chart

Effective 7/1/2024

Subject to Approval by the Board of Commissioners

Job Title	Range	Monthly					Hourly				
		Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5
*	8	3540	3717	3902	4097	4302	20.42	21.44	22.51	23.64	24.82
*	9	3628	3809	4000	4200	4410	20.93	21.98	23.08	24.23	25.44
Administrative Clerk I	10	3719	3905	4100	4305	4520	21.45	22.53	23.65	24.84	26.08
*	11	3812	4002	4202	4413	4633	21.99	23.09	24.24	25.46	26.73
*	12	3907	4102	4307	4523	4749	22.54	23.67	24.85	26.09	27.40
*	13	4005	4205	4415	4636	4868	23.10	24.26	25.47	26.75	28.08
Administrative Clerk II	14	4105	4310	4526	4752	4989	23.68	24.87	26.11	27.41	28.78
*	15	4207	4418	4639	4871	5114	24.27	25.49	26.76	28.10	29.50
Account Clerk II	16	4313	4528	4755	4992	5242	24.88	26.12	27.43	28.80	30.24
*	17	4420	4641	4873	5117	5373	25.50	26.78	28.12	29.52	31.00
Administrative Clerk III	18	4531	4757	4995	5245	5507	26.14	27.45	28.82	30.26	31.77
Administrative Clerk III - Maintenance											
*	19	4644	4876	5120	5376	5645	26.79	28.13	29.54	31.02	32.57
Maintenance Worker I	20	4760	4998	5248	5511	5786	27.46	28.84	30.28	31.79	33.38
*	21	4879	5123	5379	5648	5931	28.15	29.56	31.04	32.59	34.22
Accounting Technician	22	5001	5251	5514	5790	6079	28.85	30.30	31.81	33.40	35.07
Administrative Clerk IV											
Housing Assistant (New)											
*	23	5126	5383	5652	5934	6231	29.57	31.05	32.61	34.24	35.95
Maintenance Worker II	24	5254	5517	5793	6083	6387	30.31	31.83	33.42	35.09	36.85
Housing Inspector	25	5386	5655	5938	6235	6547	31.07	32.63	34.26	35.97	37.77
Family Self-Sufficiency Coordinator	26	5520	5797	6086	6391	6710	31.85	33.44	35.11	36.87	38.71
Housing Programs Specialist											
*	27	5658	5941	6238	6550	6878	32.65	34.28	35.99	37.79	39.68
Client Services Coordinator	28	5800	6090	6394	6714	7050	33.46	35.13	36.89	38.74	40.67
Leasing Specialist											
Maintenance Worker III (New)											
Property Management Specialist											
*	29	5945	6242	6554	6882	7226	34.30	36.01	37.81	39.70	41.69
Accounting Specialist	30	6094	6398	6718	7054	7407	35.16	36.91	38.76	40.70	42.73
Housing Programs Senior Specialist											
Maintenance Coordinator	31	6246	6558	6886	7230	7592	36.03	37.84	39.73	41.71	43.80
Executive Secretary	32	6402	6722	7058	7411	7782	36.93	38.78	40.72	42.76	44.89
Program Integrity Specialist											
*	33	6562	6890	7235	7596	7976	37.86	39.75	41.74	43.83	46.02
Accountant	34	6726	7062	7416	7786	8176	38.80	40.75	42.78	44.92	47.17
*	35	6894	7239	7601	7981	8380	39.77	41.76	43.85	46.04	48.35
*	36	7067	7420	7791	8181	8590	40.77	42.81	44.95	47.20	49.56

*		37	7243	7606	7986	8385	8804	41.79	43.88	46.07	48.38	50.79
	Senior Accountant	38	7424	7796	8185	8595	9024	42.83	44.97	47.22	49.58	52.06
	Administrative Services Supervisor	39	7610	7991	8390	8810	9250	43.90	46.10	48.40	50.82	53.37
	Housing Programs Supervisor											
	Property Management Supervisor											
	Administrative Analyst	40	7800	8190	8600	9030	9481	45.00	47.25	49.61	52.10	54.70
*		41	7995	8395	8815	9256	9718	46.13	48.43	50.85	53.40	56.07
*		42	8195	8605	9035	9487	9961	47.28	49.64	52.13	54.73	57.47
	Data Analyst	43	8400	8820	9261	9724	10210	48.46	50.88	53.43	56.10	58.91
	Facilities Manager											
	Senior Administrative Analyst	44	8610	9041	9493	9967	10466	49.67	52.16	54.76	57.50	60.38
*		45	8825	9267	9730	10216	10727	50.92	53.46	56.13	58.94	61.89
*		46	9046	9498	9973	10472	10995	52.19	54.80	57.54	60.41	63.44
	Administrative Services Assistant Director	47	9272	9736	10222	10734	11270	53.49	56.17	58.98	61.92	65.02
	Housing Programs Assistant Director											
	Human Resources Director											
	Property Management Assistant Director											
	Senior Data Analyst											
*		48	9504	9979	10478	11002	11552	54.83	57.57	60.45	63.47	66.65
	Information Technology Coordinator	49	9741	10229	10740	11277	11841	56.20	59.01	61.96	65.06	68.31
	Controller	50	9985	10484	11008	11559	12137	57.61	60.49	63.51	66.69	70.02
	Principal Management Analyst											
*		51	10235	10746	11284	11848	12440	59.05	62.00	65.10	68.35	71.77
*		52	10491	11015	11566	12144	12751	60.52	63.55	66.73	70.06	73.57
*		53	10753	11290	11855	12448	13070	62.04	65.14	68.39	71.81	75.40
	Assistant Finance Director	54	11022	11573	12151	12759	13397	63.59	66.77	70.10	73.61	77.29
*		55	11297	11862	12455	13078	13732	65.18	68.43	71.86	75.45	79.22
*		56	11580	12159	12766	13405	14075	66.81	70.15	73.65	77.34	81.20
	Administrative Services Director	57	11869	12463	13086	13740	14427	68.48	71.90	75.49	79.27	83.23
	Housing Programs Director											
	Property Management & Client Services Director											
*		58	12166	12774	13413	14083	14788	70.19	73.70	77.38	81.25	85.31
*		59	12470	13093	13748	14436	15157	71.94	75.54	79.32	83.28	87.45
	Finance Director	60	12782	13421	14092	14796	15536	73.74	77.43	81.30	85.36	89.63
*		61	13101	13756	14444	15166	15925	75.58	79.36	83.33	87.50	91.87
*		62	13429	14100	14805	15545	16323	77.47	81.35	85.41	89.69	94.17
*		63	13764	14453	15175	15934	16731	79.41	83.38	87.55	91.93	96.52
	Director of Operations	64	14109	14814	15555	16332	17149	81.40	85.47	89.74	94.23	98.94
*		65	14461	15184	15944	16741	17578	83.43	87.60	91.98	96.58	101.41
*		66	14823	15564	16342	17159	18017	85.52	89.79	94.28	99.00	103.95
*		67	15193	15953	16751	17588	18468	87.65	92.04	96.64	101.47	106.54
*		68	15573	16352	17169	18028	18929	89.85	94.34	99.05	104.01	109.21
*		69	15963	16761	17599	18479	19403	92.09	96.70	101.53	106.61	111.94
	Deputy Executive Director	70	16362	17180	18039	18941	19888	94.39	99.11	104.07	109.27	114.74
*		71	16771	17609	18490	19414	20385	96.75	101.59	106.67	112.00	117.60
*		72	17190	18049	18952	19900	20894	99.17	104.13	109.34	114.80	120.55
*		73	17620	18501	19426	20397	21417	101.65	106.73	112.07	117.67	123.56
*		74	18060	18963	19911	20907	21952	104.19	109.40	114.87	120.62	126.65
*		75	18512	19437	20409	21430	22501	106.80	112.14	117.74	123.63	129.81
*		76	18974	19923	20919	21965	23064	109.47	114.94	120.69	126.72	133.06
*		77	19449	20421	21442	22514	23640	112.20	117.82	123.71	129.89	136.39
	Executive Director	78	19935	20932	21978	23077	24231	115.01	120.76	126.80	133.14	139.80

5 YEAR CAPITAL PLAN

Capital Expenditures:	2024-25	2025-26	2026-27	2027-28	2028-29	Total
2160 41st Ave Wood Repair		3,500		3,500		7,000
2160 41st Ave Exterior Painting						0
2160 41st Ave HVAC replacements	15,000	15,000	15,000	15,000		60,000
2160 41st Ave Roofing						0
2160 41st Ave Paving/Slurry	6,500					6,500
2160 41st Ave Landscaping	3,500	2,000	2,000	3,500	2,000	13,000
2160 41st Ave Total	25,000	20,500	17,000	22,000	2,000	86,500
2170 41st Ave Paving/Slurry	4,500					4,500
2170 41st Ave Total	4,500	0	0	0	0	4,500
Casa Pajaro Unit Turnover Costs	7,650	7,800	7,960	8,120	8,282	39,812
Casa Pajaro Appliances/Water Heaters (4 per year)	8,000	8,000	8,000	8,000	8,000	40,000
Casa Pajaro Paving/Sealing		9,500				9,500
Casa Pajaro Sidewalk Repairs/Replacements	8,400					8,400
Casa Pajaro Landscaping	2,660	2,700	2,760	2,815	2,871	13,806
Casa Pajaro Wall Heaters (based on 4 per year)	9,600	9,600	9,600	9,600	9,600	48,000
Casa Pajaro Flooring (3 units per year plus incidental repairs)	22,000	22,000	22,000	22,000	22,000	110,000
Casa Pajaro Exterior Painting		60,000				60,000
Casa Pajaro Wood Repair	7,000		3,500		3,500	14,000
Casa Pajaro LED Lighting / Energy Efficiency	1,600	1,600	1,600			4,800
Casa Pajaro Total	66,910	121,200	55,420	50,535	54,253	348,318
Tierra Alta Unit Turnover Costs (based on 2 per year)	12,000	12,500	12,750	13,000	13,265	63,515
Tierra Alta Flooring (based on 3 per year plus incidental repairs)	19,950	20,350	20,750	21,165	21,588	103,803
Tierra Alta Appliances/Water Heaters (based on 2 water heaters)	4,000	4,000	4,000	4,000	4,000	20,000
Tierra Alta Heater (based on 2 replacements per year)	8,000	8,000	8,000	8,000	8,000	40,000
Tierra Alta Drainage Improvements	15,000					15,000
Tierra Alta Wood Repair	10,000		3,500		3,500	17,000
Tierra Alta Fence Repair/Replacement	14,500		3,500		3,500	21,500
Tierra Alta Wastewater (30% of \$2M + 30% of \$1.7M)	620,000	500,000				1,120,000
Tierra Alta Wastewater Engineering Upgrade Study (30% of \$1.13M)	340,275					340,275
Tierra Alta Wastewater Generator Electrical Repairs (30% of \$353k)	105,900					105,900
Tierra Alta Exterior Painting		50,000				50,000
Tierra Alta LED Lighting and Energy Efficiency	2,000					2,000
Tierra Alta Playground Installation		25,000				25,000
Tierra Alta Landscaping	4,000	4,100	4,200	4,300	4,386	20,986
Tierra Alta Total	1,155,625	623,950	56,700	50,465	58,239	1,944,979
TOTAL	1,252,035	765,650	129,120	123,000	114,492	2,384,297

**Operating Transfers In and Out
Fiscal Year Ending June 30, 2024**

<u>Program</u>	<u>Transfer Description</u>	<u>In</u>	<u>Out</u>
Casa Pajaro	From Reserves to Fund FY24-25 Capital Projects	209,000	
Casa Pajaro	To Reserves for Future Capital Projects		60,000
Tierra Alta	From HA Loan to Fund FY24-25 Capital Projects	950,000	
Low Income Public Housing	From LIPH Reserves to Fund Development Activity	6,199,179	
Low Income Public Housing	From LIPH Reserves for LIPH's Share of Pension & OPEB Liabilities	1,117,633	
Low Income Public Housing	To Fund Development Activity to Expend Remaining LIPH Reserves		6,199,179
Low Income Public Housing	To Fund LIPH's Legacy Share of Pension & OPEB Costs as Part of LIPH Program Closeout		1,117,633
Moderate Rehabilitation	New Horizons' Coverage of Client Services Coordinator and Leasing Specialists Positions	243	
Moderate Rehabilitation SRO	New Horizons' Coverage of Client Services Coordinator and Leasing Specialists Positions	205	
Santa Cruz Vouchers	New Horizons' Coverage of Client Services Coordinator and Leasing Specialists Positions	283,463	
Mainstream Vouchers	New Horizons' Coverage of Client Services Coordinator and Leasing Specialists Positions	5,361	
Emergency Housing Vouchers	New Horizons' Coverage of Client Services Coordinator and Leasing Specialists Positions	7,938	
		<u>8,773,022</u>	<u>7,376,812</u>

Reserve Balances

As of 6/30/23

Section 8:	Unrestricted	Restricted**	Total
Moving-To-Work (MTW) Reseves	12,000,000 ***		12,000,000
Santa Cruz Vouchers *	3,434,316	(238,502)	3,195,814
Mainstream Vouchers *	813,939	(16,677)	797,262
Emergency Housing Vouchers*	293,395	227,502	520,897
Mod Rehab *	781,731	-	781,731
Mod Rehab SRO *	131,905	-	131,905
Federal Housing:			
Low Rent Public Housing *	7,316,812	-	7,316,812
Casa Pajaro USDA *	94,194	1,052,465	1,146,659
Tierra Alta USDA *	121,132	724,412	845,544
Local Programs:			
County of Santa Cruz	88,137	-	88,137
City of Santa Cruz	14,375	-	14,375
City of Watsonville	-	-	0
City of Capitola	101,318	-	101,318
City of Scotts Valley	90,829	-	90,829
Misc Local Contracts	9,717	-	9,717
Business Activities:			
Mission Street Building	1,891,157	-	1,891,157
2160/2170 41st Avenue Offices	2,072,620	-	2,072,620
415 Natural Bridges	962,627		962,627
Housing Authority Reserves	601,214	-	601,214
New Horizons Admin Fund	(2,304)		
Buena Vista Admin Fund	(46,639)	-	(46,639)
Merrill Road Admin Fund	(63,866)	-	(63,866)
Spruce Street Condo	160,545	-	160,545
CalPERS Pension Fund	(6,521,380)		(6,521,380)
Other Post Retirement Benefits Fund	(110,498)		(110,498)
Total Reserves	12,235,276	1,749,200	25,986,779

* Unrestricted except by Fund

** Restrictions placed by outside entities

*** MTW reserves are based on projections for CY 2024

Agency Debts and Receivables

Lender and Project:	Purpose	Total Owed	Due FY 2024-25
Compensated Absences	Accumulated Leave per Personnel Policy	555,292	65,712
Total Outstanding		555,292	65,712

Due to Housing Authority:	Purpose	Total Due	Due FY 2024-25
2nd Deeds of Trust Arroyo Verde	To Finance Purchase	15,000	-
3rd Deeds of Trust Arroyo Verde	To Finance Purchase	4,504	-
Merrill Road Land Loan Merrill Road - 15 Apartments	To Finance Acquisition of Land	383,675	-
Merrill Road Permanent Loan Merrill Road - 15 Apartments	To Finance Construction	451,509	-
New Horizons Entity Formation Loan	Government Loan Ensures Property Tax Exemption	200,000	-
Total Due to Housing Authority		1,054,688	-

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ
Proposed Budget
Fiscal Year 2024-2025

Budgets By Program Group

	Section 8	Federal Housing	Federal Grants	Local Programs	Business Activities	2024-25 Agency-Wide Budget
Revenues:						
HAPS / Program	147,179,482	-	1,178,014	-	-	148,357,496
Administrative Fees	9,090,513	-	-	-	1,303,413	10,393,926
Grants / Contracts	-	-	221,648	799,540	-	1,021,188
Rental Income	-	1,021,829	-	-	1,040,852	2,062,681
Operating Transfers In	297,210	8,475,812	-	-	-	8,773,022
Other Income	37,821	61,000	-	15,750	46,383	160,954
Total Revenues:	156,605,027	9,558,641	1,399,662	815,290	2,390,648	170,769,268
Expenses:						
Housing Assistance Pmts	147,179,482	-	1,178,014	-	-	148,357,496
Salaries	4,823,279	267,632	149,196	51,068	791,415	6,082,590
Employee Benefits	2,433,492	95,855	49,089	14,526	244,212	2,837,174
Capital Purchases	-	1,222,535	-	-	29,500	1,252,035
Maintenance	-	414,288	-	-	165,650	579,938
General Administrative	1,921,049	175,472	1,866	17,349	554,881	2,670,616
Tenant Services	42,000	-	21,497	730,540	-	794,037
Operating Transfers Out	-	7,376,812	-	-	-	7,376,812
Debt Service	-	-	-	-	-	-
Total Expenses:	156,399,302	9,552,594	1,399,662	813,483	1,785,658	169,950,698
Surplus (Deficit):	205,725	6,047	0	1,807	604,990	818,569

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Agency-Wide Budget

	2024-25 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2024-25
Revenues:			
HAPS / Program	130,123,212	148,357,496	18,234,284
Administrative Fees	10,536,426	10,393,926	(142,500)
Grants / Contracts	1,010,218	1,021,188	10,970
Rental Income	1,750,192	2,147,370	397,178
Operating Transfers In	1,055,000	8,773,022	7,718,022
Other Income	191,641	160,954	(30,686)
Total Revenues:	144,666,689	170,853,957	26,187,268
Expenses:			
Housing Assistance Pmts	130,123,392	148,357,496	18,234,104
Salaries	5,499,769	6,082,590	582,820
Employee Benefits	2,242,218	2,837,174	594,956
Capital Purchases	942,247	1,252,035	309,788
Maintenance	615,535	612,058	(3,477)
General Administrative	2,434,270	2,723,186	288,915
Tenant Services	864,890	794,037	(70,852)
Operating Transfers Out	109,366	7,376,812	7,267,446
Debt Service	13,096	-	(13,096)
Total Expenses:	142,844,783	170,035,388	27,190,605
Surplus (Deficit):	1,821,906	818,569	(1,003,336)

Section 8 Programs

Santa Cruz Vouchers

This fund accounts for revenues and expenses associated with administering the tenant based Section 8 Housing Choice Voucher Program for the County of Santa Cruz and the City of Hollister, including VASH & EHV vouchers.

Disabled Vouchers (Mainstream and NED)

This fund accounts for revenues and expenses associated with administering the tenant based Section 8 Housing Choice Voucher Program for Disabled in the County of Santa Cruz.

Moderate Rehabilitation

This fund accounts for revenues and expenses associated with administering the project based Section 8 Mod Rehab Program for the County of Santa Cruz. Some of these vouchers are transitioning to Housing Choice Vouchers as the original 15 year contracts are expiring. There are only 13 of 309 units remaining.

Moderate Rehabilitation SRO

This fund accounts for revenues and expenses associated with administering the project based Section 8 Mod Rehab SRO Program.

Emergency Housing Vouchers (EHV)

This fund accounts for revenues and expenses associated with administering the Emergency Housing Voucher Program.

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Section 8 Program Group

Includes Mod Rehab, Mainstream, EHV, and Santa Cruz Voucher Programs

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	129,191,198	147,179,482	17,988,284
Administrative Fees	9,435,358	9,090,513	(344,844)
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	297,210	297,210
Other Income	44,231	37,821	(6,410)
Total Revenues:	138,670,787	156,605,027	17,934,240
Expenses:			
Housing Assistance Pmts	129,191,378	147,179,482	17,988,104
Salaries	4,376,067	4,823,279	447,212
Employee Benefits	1,918,147	2,433,492	515,345
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	1,744,470	1,921,049	176,578
Tenant Services	100,000	42,000	(58,000)
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	137,330,062	156,399,302	19,069,240
Surplus (Deficit):	1,340,725	205,725	(1,135,000)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Santa Cruz Voucher Program

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	118,443,076	135,347,242	16,904,166
Administrative Fees	8,494,094	8,202,878	(291,216)
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	283,463	283,463
Other Income	23,000	20,000	(3,000)
Total Revenues:	126,960,170	143,853,583	16,893,413
Expenses:			
Housing Assistance Pmts	118,443,076	135,347,242	16,904,166
Salaries	4,092,966	4,500,155	407,189
Employee Benefits	1,789,432	2,270,893	481,461
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	1,636,831	1,802,243	165,413
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	125,962,304	143,920,533	17,958,229
Surplus (Deficit):	997,866	(66,950)	(1,064,816)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Mainstream Disabled Vouchers

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	3,797,764	4,305,000	507,236
Administrative Fees	323,674	330,403	6,729
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	5,361	5,361
Other Income	9,600	8,000	(1,600)
Total Revenues:	4,131,038	4,648,764	517,726
Expenses:			
Housing Assistance Pmts	3,797,764	4,305,000	507,236
Salaries	98,203	126,001	27,798
Employee Benefits	44,951	63,405	18,454
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	37,646	46,761	9,116
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	3,978,563	4,541,167	562,604
Surplus (Deficit):	152,475	107,596	(44,878)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget Fiscal Year 2024-2025

Moderate Rehabilitation

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	186,296	173,040	(13,256)
Administrative Fees	32,041	24,532	(7,509)
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	243	243
Other Income	9,665	8,039	(1,626)
Total Revenues:	228,002	205,853	(22,149)
Expenses:			
Housing Assistance Pmts	186,296	173,040	(13,256)
Salaries	6,985	5,707	(1,278)
Employee Benefits	3,153	2,872	(281)
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	2,677	2,246	(431)
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	199,111	183,865	(15,245)
Surplus (Deficit):	28,891	21,988	(6,903)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Moderate Rehabilitation SRO

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	92,831	99,000	6,169
Administrative Fees	20,021	20,758	736
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	205	205
Other Income	1,716	1,533	(184)
Total Revenues:	114,569	121,495	6,927
Expenses:			
Housing Assistance Pmts	92,831	99,000	6,169
Salaries	3,898	4,830	932
Employee Benefits	1,757	2,430	673
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	1,521	1,754	233
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	100,007	108,014	8,007
Surplus (Deficit):	14,562	13,481	(1,081)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Emergency Housing Voucher Program

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	6,671,231	7,255,200	583,969
Administrative Fees	565,527	511,943	(53,584)
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	7,938	7,938
Other Income	250	250	-
Total Revenues:	7,237,008	7,775,331	538,323
Expenses:			
Housing Assistance Pmts	6,671,411	7,255,200	583,789
Salaries	174,015	186,586	12,571
Employee Benefits	78,855	93,892	15,037
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	65,796	68,043	2,248
Tenant Services	100,000	42,000	(58,000)
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	7,090,077	7,645,721	555,644
Surplus (Deficit):	146,931	129,610	(17,321)

Federal Housing Programs

Low Income Public Housing (LIPH)

This fund accounts for the rental revenues and expenses associated with the Housing Authority owned public housing units and the supplemental income provided by HUD. Effective January, 1, 2021, this program transferred property ownership of the 234 LIPH units to New Horizons (a non-profit affiliated entity) and the residents were issued Tenant Protection Vouchers. HUD refers to this process as a Streamlined Voluntary Conversion. Following conversion, there will be a close-out of all remaining LIPH activities and finances once all remaining reserve funds are expended.

Casa Pajaro

This fund accounts for the rental revenues and expenses associated with the farmworker housing project on East Front Street in Watsonville.

Tierra Alta

This fund accounts for the rental revenues and expenses associated with the farmworker housing project on Tierra Alta Drive in Watsonville.

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Federal Housing Program Group

Includes LIPH, Casa Pajaro (USDA), and Tierra Alta (USDA)

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	676,657	1,021,829	345,172
Operating Transfers In	1,055,000	8,475,812	7,420,812
Other Income	89,834	61,000	(28,834)
Total Revenues:	1,821,491	9,558,641	7,737,150
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	242,588	267,632	25,044
Employee Benefits	81,459	95,855	14,396
Capital Purchases	788,009	1,222,535	434,526
Maintenance	420,423	414,288	(6,135)
General Administrative	164,939	175,472	10,533
Tenant Services	-	-	-
Operating Transfers Out	109,366	7,376,812	7,267,446
Debt Service	13,096	-	(13,096)
Total Expenses:	1,819,881	9,552,594	7,732,714
Surplus (Deficit):	1,611	6,047	4,436

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Low Income Public Housing (LIPH) Program

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	7,316,812	7,316,812
Other Income	-	-	-
Total Revenues:	-	7,316,812	7,316,812
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	-	-	-
Employee Benefits	-	-	-
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	-	-	-
Tenant Services	-	-	-
Operating Transfers Out	-	7,316,812	7,316,812
Debt Service	-	-	-
Total Expenses:	-	7,316,812	7,316,812
Surplus (Deficit):	-	-	-

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget Fiscal Year 2024-2025

Casa Pajaro (USDA)

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	297,157	297,157	-
Operating Transfers In	115,000	209,000	94,000
Other Income	54,371	43,000	(11,371)
Total Revenues:	466,528	549,157	82,629
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	117,739	129,993	12,254
Employee Benefits	39,564	46,559	6,995
Capital Purchases	-	66,910	66,910
Maintenance	133,159	142,300	9,141
General Administrative	92,267	98,346	6,079
Tenant Services	-	-	-
Operating Transfers Out	66,350	60,000	(6,350)
Debt Service	13,096	-	(13,096)
Total Expenses:	462,175	544,108	81,933
Surplus (Deficit):	4,353	5,049	696

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Tierra Alta Farm (USDA)

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	379,500	724,672	345,172
Operating Transfers In	940,000	950,000	10,000
Other Income	35,463	18,000	(17,463)
Total Revenues:	1,354,963	1,692,672	337,709
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	124,848	137,639	12,791
Employee Benefits	41,896	49,296	7,400
Capital Purchases	788,009	1,155,625	367,616
Maintenance	287,264	271,988	(15,276)
General Administrative	72,672	77,126	4,454
Tenant Services	-	-	-
Operating Transfers Out	43,016	-	(43,016)
Debt Service	-	-	-
Total Expenses:	1,357,705	1,691,674	333,968
Surplus (Deficit):	(2,742)	998	3,741

Federal Grants

HUD FSS Coordinator Grant

This fund accounts for the expenses and funding associated with outreach and service to eligible families in the Section 8 Program for Family Self Sufficiency.

Shelter Plus Care COC Grant

This fund accounts for the revenues and expenses associated with providing housing and supportive services to groups with specific needs.

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget Fiscal Year 2024-2025

Federal Grant Programs Group

Includes Family Self-Sufficiency Program and Shelter Plus Care

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	932,014	1,178,014	246,000
Administrative Fees	-	-	-
Grants / Contracts	213,772	221,648	7,876
Rental Income	-	-	-
Operating Transfers In	-	-	-
Other Income	-	-	-
Total Revenues:	1,145,786	1,399,662	253,876
Expenses:			
Housing Assistance Pmts	932,014	1,178,014	246,000
Salaries	144,599	149,196	4,597
Employee Benefits	47,682	49,089	1,407
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	1,490	1,866	375
Tenant Services	20,000	21,497	1,497
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	1,145,786	1,399,662	253,876
Surplus (Deficit):	0	0	(0)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget Fiscal Year 2024-2025

Family Self Sufficiency (FSS) Coordinator Grant

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	192,263	195,940	3,677
Rental Income	-	-	-
Operating Transfers In	-	-	-
Other Income	-	-	-
Total Revenues:	192,263	195,940	3,677
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	144,048	146,643	2,595
Employee Benefits	47,304	48,334	1,030
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	911	963	52
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	192,263	195,940	3,677
Surplus (Deficit):	-	-	(0)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget Fiscal Year 2024-2025

Shelter Plus Care Grant

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	932,014	1,178,014	246,000
Administrative Fees	-	-	-
Grants / Contracts	21,509	25,708	4,199
Rental Income	-	-	-
Operating Transfers In	-	-	-
Other Income	-	-	-
Total Revenues:	953,523	1,203,722	250,199
Expenses:			
Housing Assistance Pmts	932,014	1,178,014	246,000
Salaries	551	2,553	2,002
Employee Benefits	378	755	377
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	580	903	323
Tenant Services	20,000	21,497	1,497
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	953,523	1,203,722	250,199
Surplus (Deficit):	0	0	(0)

Local Programs

County of Santa Cruz

This fund accounts for revenues and expenses associated with technical assistance contracts for the administration of affordable housing programs in the County of Santa Cruz, including the security deposit program and the landlord incentive program.

City of Santa Cruz

This fund accounts for revenues and expenses associated with technical assistance contracts for the administration of affordable housing programs in the City of Santa Cruz, including security deposits, Measure O, and the landlord incentive program.

City of Watsonville

This fund accounts for revenues and expenses associated with the administration of affordable housing programs in the City of Watsonville, including the security deposit and landlord incentive programs.

City of Capitola

This fund accounts for revenues and expenses associated with technical assistance contracts for the administration of affordable housing programs in the City of Capitola, including security deposit program and landlord incentive program.

City of Scotts Valley

This fund accounts for revenues and expenses associated with technical assistance contracts for the administration of affordable housing programs in the City of Scotts Valley, including monitoring of inclusionary unit compliance and the landlord incentive program.

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Local Programs Group

Includes local programs funded by the County of Santa Cruz and the Cities of Santa Cruz, Watsonville, Capitola, and Scotts Valley

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	796,446	799,540	3,094
Rental Income	-	-	-
Operating Transfers In	-	-	-
Other Income	15,342	15,750	408
Total Revenues:	811,788	815,290	3,502
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	49,146	51,068	1,922
Employee Benefits	11,883	14,526	2,643
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	10,993	17,349	6,356
Tenant Services	744,890	730,540	(14,350)
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	816,911	813,483	(3,429)
Surplus (Deficit):	(5,123)	1,807	6,930

Business Activities

Mission Street Warehouse Building

This fund accounts for the rental revenues and expenses associated with the Housing Authority owned building on Mission Street.

Natural Bridges Development

This fund accounts for the pre-development and development costs associated with the 20 unit site before the sale to New Horizons.

Housing Authority 2160 41st Avenue Office

This fund accounts for the rental revenues charged to Authority programs and the expenses associated with the space owned at 2160 41st Avenue in Capitola.

Housing Authority 2170 41st Avenue Office (Annex)

This fund accounts for the rental revenues charged to Authority programs and the expenses associated with the leased office space at 2170 41st Avenue in Capitola.

Housing Authority 2140 41st Avenue Office (Additional Annex)

This fund accounts for the rental revenues charged to Authority programs and the expenses associated with the leased office space at 2140 41st Avenue in Capitola.

Agency Unrestricted Reserve Fund (Non-Program Specific)

This fund accounts for the Housing Authority's accumulated unrestricted reserves and the corresponding interest income as well as expenses that are not related to specific funds or projects.

New Horizons LIPH Administration Fund

This fund accounts for the administrative/management fee received from New Horizons for the management of duties performed by Housing Authority staff on behalf of New Horizons for the former LIPH units. Charged to this fund are the personnel costs and overhead associated with the performance of these duties.

New Horizons Brommer Administration Fund

This fund accounts for the administrative/management fee received from New Horizons for the management of duties performed by Housing Authority staff on behalf of New Horizons for the Brommer units. Charged to this fund are the personnel costs and overhead associated with the performance of these duties.

New Horizons Brommer Administration Fund

This fund accounts for the administrative/management fee received from New Horizons for the management of duties performed by Housing Authority staff on behalf of New Horizons for the units at 415 Natural Bridges Drive. Charged to this fund are the personnel costs and overhead associated with the performance of these duties.

Merrill Road Administration

This fund accounts for the administrative fee paid to the Housing Authority by the Merrill Road Associates, and the accompanying overhead costs that are associated with this program.

Spruce Street

This fund accounts for the rental revenues and expenses associated with the Housing Authority owned condominium on Spruce Street in Santa Cruz.

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Business Activities Group

Includes Business-Type Activities for Mission Street Warehouse, 41st Ave Offices, and the Management Funds for New Horizons, and Merrill Road

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	1,101,068	1,303,413	202,345
Grants / Contracts	-	-	-
Rental Income	1,073,535	1,125,541	52,006
Operating Transfers In	-	-	-
Other Income	42,233	46,383	4,150
Total Revenues:	2,216,836	2,475,337	258,501
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	687,370	791,415	104,045
Employee Benefits	183,047	244,212	61,165
Capital Purchases	154,238	29,500	(124,738)
Maintenance	195,112	197,770	2,658
General Administrative	512,378	607,451	95,073
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	1,732,144	1,870,347	138,203
Surplus (Deficit):	484,692	604,990	120,297

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Mission Street Warehouse Building

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	422,140	424,728	2,588
Operating Transfers In	-	-	-
Other Income	8,000	10,000	2,000
Total Revenues:	430,140	434,728	4,588
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	-	-	-
Employee Benefits	-	-	-
Capital Purchases	-	-	-
Maintenance	758	800	42
General Administrative	15,162	13,286	(1,876)
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	15,920	14,086	(1,834)
Surplus (Deficit):	414,220	420,642	6,422

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

2160 41st Ave Office

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	363,537	364,104	567
Operating Transfers In	-	-	-
Other Income	20,000	20,000	-
Total Revenues:	383,537	384,104	567
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	-	-	-
Employee Benefits	-	-	-
Capital Purchases	107,316	25,000	(82,316)
Maintenance	119,508	110,800	(8,708)
General Administrative	19,082	21,741	2,659
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	245,906	157,541	(88,365)
Surplus (Deficit):	137,631	226,563	88,932

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

2170 41st Ave Office Annex

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	228,157	228,512	356
Operating Transfers In	-	-	-
Other Income	-	-	-
Total Revenues:	228,157	228,512	356
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	-	-	-
Employee Benefits	-	-	-
Capital Purchases	-	4,500	4,500
Maintenance	57,934	53,550	(4,384)
General Administrative	170,223	174,962	4,740
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	228,157	233,012	4,856
Surplus (Deficit):	0	(4,500)	(4,500)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

2140 41st Ave Office Annex

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	36,194	84,689	48,495
Operating Transfers In	-	-	-
Other Income	-	-	-
Total Revenues:	36,194	84,689	48,495
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	-	-	-
Employee Benefits	-	-	-
Capital Purchases	46,922	-	(46,922)
Maintenance	16,475	32,120	15,645
General Administrative	19,719	52,569	32,850
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	83,116	84,689	1,573
Surplus (Deficit):	(46,922)	-	46,922

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

Agency Unrestricted Reserve Fund (Non-Program Specific)

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	-	-
Other Income	13,433	15,583	2,150
Total Revenues:	13,433	15,583	2,150
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	-	-	-
Employee Benefits	-	-	-
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	11,649	15,000	3,351
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	11,649	15,000	3,351
Surplus (Deficit):	1,784	583	(1,201)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

New Horizons LIPH Administration Fund

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	1,068,516	1,233,718	165,202
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	-	-
Other Income	-	-	-
Total Revenues:	1,068,516	1,233,718	165,202
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	658,450	733,502	75,052
Employee Benefits	172,945	224,722	51,777
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	237,121	275,494	38,373
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	1,068,516	1,233,718	165,202
Surplus (Deficit):	(0)	(0)	(0)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

New Horizons Brommer Administration Fund

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	5,972	5,832	(140)
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	-	-
Other Income	-	-	-
Total Revenues:	5,972	5,832	(140)
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	12,045	13,460	1,415
Employee Benefits	3,423	4,029	606
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	4,682	5,106	424
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	20,149	22,595	2,446
Surplus (Deficit):	(14,177)	(16,763)	(2,586)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget

Fiscal Year 2024-2025

New Horizons Natural Bridges Administration Fund

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	37,283	37,283
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	-	-
Other Income	-	-	-
Total Revenues:	-	37,283	37,283
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	-	22,058	22,058
Employee Benefits	-	6,715	6,715
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	-	8,509	8,509
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	-	37,283	37,283
Surplus (Deficit):	-	-	-

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget Fiscal Year 2024-2025

Merrill Road Administration Fund

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	26,580	26,580	-
Grants / Contracts	-	-	-
Rental Income	-	-	-
Operating Transfers In	-	-	-
Other Income	-	-	-
Total Revenues:	26,580	26,580	-
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	15,940	21,291	5,352
Employee Benefits	6,531	8,409	1,878
Capital Purchases	-	-	-
Maintenance	-	-	-
General Administrative	16,770	22,710	5,940
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	39,240	52,410	13,170
Surplus (Deficit):	(12,660)	(25,830)	(13,170)

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ

Proposed Budget Fiscal Year 2024-2025

Spruce Street

	2023-24 Projected Actuals	2024-25 Proposed Budget	Increase / (Decrease) from 2023-24
Revenues:			
HAPS / Program	-	-	-
Administrative Fees	-	-	-
Grants / Contracts	-	-	-
Rental Income	23,508	23,508	-
Operating Transfers In	-	-	-
Other Income	800	800	-
Total Revenues:	24,308	24,308	-
Expenses:			
Housing Assistance Pmts	-	-	-
Salaries	935	1,103	168
Employee Benefits	148	337	189
Capital Purchases	-	-	-
Maintenance	437	500	63
General Administrative	17,971	18,073	102
Tenant Services	-	-	-
Operating Transfers Out	-	-	-
Debt Service	-	-	-
Total Expenses:	19,491	20,013	521
Surplus (Deficit):	4,817	4,295	(521)

AGENDA ITEM SUMMARY

MEETING DATE: May 22, 2024

ITEM NUMBER: 8

FROM: Exec. Director; Deputy Exec. Director

SUBJECT: Director's Report – May 22, 2024

RECOMMENDATION: Receive Report

BACKGROUND SUMMARY:

Please call or e-mail me with questions you might have on any of the Agenda Items for the May 22, 2024 meeting. My phone number is (831) 454-5931 and my email address is jennyp@hacosantacruz.org.

Natural Bridges Apartments – Exterior and interior work to continue at the site. Exterior work includes pipe installation for the joint trench and water line installation. PG&E inspection of the joint trench occurred this week and backfill of the trench is imminent. Interior electrical and plumbing finishes were installed, and the installation of kitchen cabinets is ongoing. Upcoming interior work includes installation of countertops, closet doors, and interior flooring. We continue to work with architects, engineers, and PG&E on coordinating permanent electricity to the site and are pending a date from PG&E. Tenant occupancy is scheduled for Fall 2024.

Call to Artists – On April 25, New Horizons issued a Call to Artists for a mural at Natural Bridges Apartments. The mural is to be painted along a perimeter wall located on the southwest side of the property, adjacent to the future expansion of the rail trail along the border of the property line. The wall will be constructed of concrete masonry units (CMU) with a smooth stucco overlay and will be approximately 7 feet tall and 118 feet wide. The mural will be on the rail trail side of the wall as a public art installation facing away from the apartment building. Staff are also considering expanding the scope of the project to include a mural on the property side of the CMU wall. Artist submissions are due Monday, May 20, and interviews with a shortlist of artists is scheduled for Friday, May 24. The selected artist is scheduled to be notified of the contract award on Monday, May 27. The preliminary mural design will be presented to the Board of Commissioners at the June board meeting. New Horizon plans to submit an application to the City Art Commission through the Mural Matching Grant program for review by the commission on Wednesday August 14. The mural installation is scheduled to occur in August and September of this year.

National Association of Housing and Redevelopment Officials (NAHRO) Pacific Southwest Regional Conference (PSWRC) – As a reminder, our local regional chapter of NAHRO will be hosting a conference in San Jose this year, May 28 – 30th. Conference registration remains open. The conference includes a Commissioners Fundamentals course that may be of interest to any Commissioners that have not yet taken this, as well as Brown Act training for anyone unable to attend our Brown Act training last month. If any

Commissioners are interested in attending, please inform Courtney Byrd so she can complete your registration.

Affordable Housing Month – May is Affordable Housing Month! Housing Santa Cruz County is taking a leadership role in organizing and coordinating more than 20 events throughout the month of May to encourage advocates and allies to join forces in highlighting the need for affordable housing, as well as promoting some of the work being done locally. A full calendar of Affordable Housing Month activities is available here: <https://www.housingsantacruzcounty.com/affordable-housing-month>

The Housing Authority hosted or co-hosting the following two events:

- **Housing Discrimination Forum** – Held May 8th at 5pm at the Community Foundation in Aptos. This event featured a presentation from California Rural Legal Aid (CRLA) and Senior Legal Services on fair housing, highlighting information about discriminatory practices and how to report them. After the presentation, the event featured a panel discussion with CRLA, Senior Legal Services, Conflict Resolution Center, and Tenant Sanctuary, moderated by the Executive Director of Housing Santa Cruz County and President of the local chapter of the NAACP. The event was well attended, with over 50 attendees, including community members, and staff from partner agencies.
- **Property Owner Appreciation Event** – Held May 14th at 5:30pm at Seacliff Inn, Aptos. Participating landlords were invited to an appreciation event and award ceremony. The event featured remarks from Supervisor Justin Cummings, as well as, Housing For Health Director Robert Ratner, and a joint presentation from the Housing Authority and Abode Services. The event concluded with various landlord awards, recognizing and honoring landlords who house the most voucher families, the most families exiting homelessness, and who have been participating in the program the longest, including one landlord who has participated in the program for over 40 years. Over 60 current and prospective landlords attended the event.

Additionally, Housing Authority staff attended and participated in several other events, including the Tabasa Gardens Grand Opening, the March to End Homelessness, and Pacific Station North Groundbreaking. The Bienestar Grand Opening is scheduled for May 29th.

Brown Act Training – On April 25th, Jhaila Brown of Goldfarb Lipman provided a training on the Brown Act, the role of Commissioners including the Chair and Vice Chair, and Running Effective Public Meetings. A few Board members attended the training, along with several members of Agency staff. The PowerPoint presentation was sent to all Commissioners, along with a link to the video for anyone who was not able to attend.

Appropriations and HUD Budget Update – On May 8th, HUD finally provided PHAs with our much-anticipated funding letters, including information about Agency level funding for CY 2024. HACSC is receiving a 17% inflation funding adjustment intended to increase our budget in a way that is proportional to increases in our costs. The final inflation funding adjustment is significantly higher than the 10% draft inflation factor that HUD initially provided in January. Staff believe the increased inflation factor is the result of changes to the RFIF formula driven by strong advocacy initiated by HACSC, and subsequently supported by NAHRO, CAHA, and other industry groups. Additionally, staff have been informed that our

application for 7.8M in set-aside funding for Natural Bridges has been deemed eligible. HUD may not have sufficient funds to provide the entire 7.8M we are eligible to receive.

HOUSING AUTHORITY OF THE COUNTY OF SANTA CRUZ