



**TOWN OF LAKE HAMILTON
TOWN COUNCIL
FINAL BUDGET HEARING AND SPECIAL
MEETING AGENDA
Tuesday, September 27, 2022
5:05 P.M.**

The Town Council of the Town of Lake Hamilton will hold a Final Budget Hearing and Special Meeting, on Tuesday, September 27, 2022, at 5:05 PM at the Town Hall, 100 Smith Ave, Lake Hamilton, FL 33851.

1. CALL TO ORDER BY THE MAYOR

2. INVOCATION

3. PLEDGE OF ALLEGIANCE

4. ROLL CALL OF COUNCIL MEMBERS BY THE CLERK

5. ITEMS TO BE DISCUSSED BY THE COUNCIL

- OPEN PUBLIC HEARING-

- a. Review the Budget- *pages 1-15*
- b. Second Reading of Resolution R-2022-13 to Adopt the 2022-2023 Millage Rate- *pages 16-18*
- c. Second Reading of Resolution R-2022-14 to Adopt the 2022-2023 Budget and CIP- *pages 19-21*

- CLOSE PUBLIC HEARING

SPECIAL COUNCIL MEETING ITEMS TO BE DISCUSSED:

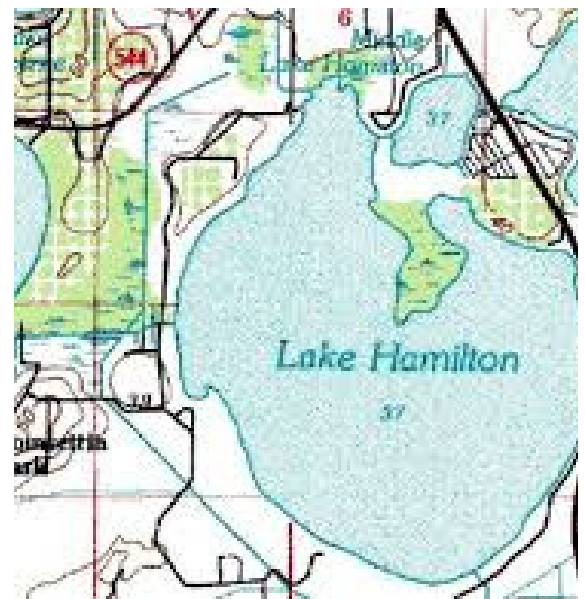
- d. Consider Right of Permit for Spectrum- *pages 22-28*
- e. Consider Appointment of Randi Golemme to the Parks and Recreation Advisory Board- *pages 29-30*
- f. SouthState CD- consider redeeming and adding to General Fund- *pages 31-32*
- g. Consider Service Agreement with Lakeland Area Mass Transit District- *pages 33-39*
- h. Consider ARPA Funding for WWTF Land Purchase- *pages 40-41*
- i. Consider Amendment to Personnel Policy- *pages 42-108*

6. ADJOURNMENT

IN ACCORDANCE WITH THE AMERICANS WITH DISABILITIES ACT AND F. S. 286.26, PERSONS WITH DISABILITIES NEEDING SPECIAL ACCOMMODATIONS TO PARTICIPATE IN THESE PROCEEDINGS PLEASE CONTACT TOWN CLERK, BRITTNEY SANDOVALSOTO, TOWN HALL, LAKE HAMILTON, FL AT 863-439-1910 WITHIN TWO (2) WORKING DAYS OF YOUR RECEIPT OF THIS NOTIFICATION. IF A PERSON DESIRES TO APPEAL ANY DECISION MADE BY THE TOWN COUNCIL WITH RESPECT TO ANY MATTER CONSIDERED AT ITS MEETING, HE OR SHE WILL NEED A RECORD OF THE PROCEEDINGS, AND THAT, FOR SUCH PURPOSE, AFFECTED PERSONS MAY NEED TO ENSURE THAT A VERBATIM RECORD OF THE PROCEEDINGS IS MADE, WHICH RECORD INCLUDES THE TESTIMONY AND EVIDENCE WHICH THE APPEALS IS TO BE BASED. (F.S. 286.26.105)



FY 2022-2023 Proposed Annual Budget





Intern-Town Administrators Office

September 13, 2022

Honorable Mayor & Town Council members,

I am pleased to present the Town of Lake Hamilton's budget for fiscal year (FY) 22/23 for your consideration. The Proposed budget includes the General Fund, Enterprise Fund, Stormwater Fund, and the Town's five-year Capital Improvement Plan (CIP).

Capital

The five-year capital improvement plan continues a high level of investment from all aspects of the Town. This includes the construction of the Town's first wastewater facility and septic to sewer program is an \$11,798,741 investment with Grant, developer money and SRF Loan. An investment in the upgrade of the Water Plant will start in this budget year which will be a \$272,500 investment and will continue over the next 3 budget cycles. Road repaving in this budget cycle includes an investment of \$2,475,500 which is mostly grant. Vehicle replacement continues for the town's vehicles in this budget cycle and the continuation of investment in the Town's Park facilities.

Growth over the next budget year and increasing in the next several budgets will continue to cause an increase in the number of projects that will need to be in place for this growth. This includes the second phase and third phase of the wastewater treatment plant, reclaimed water system, additional road projects, extension of sewer lines to Highway 27, central lift stations and some additional facility upgrades with additional staffing.

Revenue

Revenue from ad valorem taxes did increase in 2021-2022 and will see some significant growth beyond 2022-2023 with the addition of Scenic Terrace South, the Bluffs, and Feltrim Lakes. Some additional commercial projects are also in early planning status and could be completed in the 2022-2023 budget year.

Expenditures

The budget mostly maintains expenditure levels this year with a small increase across most areas. The expenditures in this budget year have also been aligned with the revenues.

Payroll

The salary plan is fully funded with a COLA of \$1.00 per employee and up to a 2.5% merit raise during evaluation period. The budget does have several new positions this budget cycle with most being in the second half of the budget year.

With the minimum wage law increase to \$15.00 an hour, all Towns employees are now above this future requirement.

The health care for 2022/2023 was only a 2.5% increase above 2021/2022 instead of the normal 12%-15% increase that most are experiencing at this time.

Summary

The proposed 22/23 budget is balanced and contains significant long term capital investments within the CIP for Enterprise projects.

Revenue increases continue to occur from year to year.

The Town's long-term growth looks strong based upon the projects in residential construction along with the increased population that is occurring at this time.

The Town is in sound financial condition with investments in capital and positive growth moving forward.

Respectfully submitted,

A handwritten signature in dark ink, appearing to read 'M. Teague', followed by a long horizontal flourish.

Michael Teague
Intern-Town Administrator

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

511.00 (Town Council) General Fund

	<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
<u>PERSONNEL SERVICES</u>			
001.511.11. EXECUTIVE SALARIES	\$ 3,180	\$ 3,200	\$ 6,300
Total Personnel Services	\$ 3,180	\$ 3,200	\$ 6,300
<u>OPERATING EXPENDITURE / EXPENSES</u>			
001.511.31. PROFESSIONAL SERVICES	\$ 75,000	\$ 136,134	\$ -
001.511.40. TRAVEL AND PER DIEM	\$ 600	\$ 3,963	\$ 6,000
001.511.45. INSURANCE	\$ 50,000	\$ 59,474	\$ -
001.511.46. REPAIR AND MAINTENANCE SERVICES	\$ -	\$ 2,401	\$ -
001.511.47. PRINTING AND BINDING (Code of Ordinances)	\$ 3,500	\$ 4,052	\$ 3,500
001.511.49. OTHER CURRENT CHARGES AND OBLIGATIONS	\$ -	\$ 211	\$ -
001.511.52. OPERATING	\$ -	\$ 50	\$ -
001.511.54. SUBS, PUBS & MEMBERSHIPS	\$ 2,500	\$ 49,707	\$ 1,200
001.511.55. TRAINING	\$ 3,000	\$ 2,100	\$ 3,000
Total Operating Expenses	\$ 134,600	\$ 258,092	\$ 13,700
<u>CAPITAL OUTLAY</u>			
001.511.62. BUILDING (CIP - Community Center Grant)	\$ -	\$ 618,639	\$ 1,500,000
001.511.63. INFRASTRUCTURE	\$ -	\$ 4,999	\$ -
Total Capital Outlay	\$ -	\$ 623,639	\$ 1,500,000
<u>DEPARTMENT TOTALS</u>	\$ 137,780	\$ 884,931	\$ 1,520,000

512.00 (Town Administrator & Town Clerk) General Fund

	<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
<u>PERSONNEL SERVICES</u>			
001.512.11. EXECUTIVE SALARIES	\$ -	\$ -	\$ 136,320
001.512.15. LONGEVITY PAY	\$ 728	\$ 630	\$ 364
001.512.21. FICA TAXES	\$ -	\$ -	\$ 10,456
001.512.22. RETIREMENT CONTRIBUTIONS	\$ -	\$ -	\$ 4,265
001.512.23. LIFE AND HEALTH INSURANCE	\$ -	\$ -	\$ 22,424
Total Personnel Services	\$ 728	\$ 630	\$ 173,829
<u>OPERATING EXPENDITURE / EXPENSES</u>			
001.512.31. ELECTION EXPENSES (Town Clerk)	\$ -	\$ -	\$ 5,000
001.512.40. TRAVEL AND PER DIEM	\$ -	\$ -	\$ 6,000
001.512.41. COMMUNICATION SERVICES	\$ -	\$ -	\$ -
001.512.42. FREIGHT & POSTAGE SERVICES	\$ -	\$ -	\$ 250
001.512.43. UTILITY SERVICES	\$ -	\$ -	\$ -
001.512.44. RENTALS AND LEASES	\$ -	\$ -	\$ 1,500
001.512.45. INSURANCE	\$ -	\$ -	\$ -
001.512.46. REPAIR AND MAINTENANCE SERVICES	\$ -	\$ -	\$ 2,000
001.512.47. PRINTING AND BINDING	\$ -	\$ -	\$ 2,000
001.512.51. OFFICE SUPPLIES	\$ -	\$ -	\$ 3,000
001.512.52. OPERATING SUPPLIES	\$ -	\$ -	\$ 5,000
001.512.52.1 FUEL	\$ 1,000	\$ 108	\$ 1,500
001.512.54. SUBS, PUBS & MEMBERSHIPS	\$ -	\$ -	\$ 7,000
001.512.55. TRAINING	\$ -	\$ -	\$ 5,000
Total Operating Expenses	\$ 1,000	\$ 108	\$ 38,250
<u>DEPARTMENT TOTALS</u>	\$ 1,728	\$ 738	\$ 212,079

513.00 (Finance Department) General Fund

	<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
<u>PERSONNEL SERVICES</u>			
001.513.12. REGULAR SALARIES AND WAGES	\$ 193,523	\$ 163,988	\$ 81,774
001.513.21. FICA TAXES	\$ 14,860	\$ 70,039	\$ 6,256
001.513.22. RETIREMENT CONTRIBUTIONS	\$ 6,743	\$ 6,299	\$ 2,834
001.513.23. LIFE AND HEALTH INSURANCE	\$ 44,600	\$ 32,846	\$ 22,424
Total Personnel Services	\$ 259,726	\$ 273,172	\$ 113,288
<u>OPERATING EXPENDITURE / EXPENSES</u>			
001.513.31. PROFESSIONAL SERVICES	\$ -	\$ -	\$ -
001.513.40. TRAVEL AND PER DIEM	\$ 4,500	\$ 2,687	\$ 3,000
001.513.41. COMMUNICATION SERVICES	\$ 3,500	\$ 2,267	\$ -
001.513.42. FREIGHT & POSTAGE SERVICES	\$ -	\$ -	\$ 1,500
001.513.43. UTILITY SERVICES	\$ 3,500	\$ 3,205	\$ -
001.513.44. RENTALS AND LEASES	\$ 1,800	\$ 1,715	\$ 1,500
001.513.46. REPAIR AND MAINTENANCE SERVICES	\$ 1,200	\$ 740	\$ 1,500
001.513.47. PRINTING AND BINDING	\$ 1,500	\$ -	\$ 1,500
001.513.49. OTHER CURRENT CHARGES AND OBLIGATIONS	\$ -	\$ 416	\$ -
001.513.49. ADVERTISING	\$ 1,500	\$ 133	\$ 1,000

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

(Finance Department) (Cont'd)					
001.513.51	OFFICE SUPPLIES	\$	-	\$ 264	\$ 1,500
001.513.52	OPERATING SUPPLIES	\$	10,000	\$ 7,435	\$ 5,000
001.513.54	SUBS, PUBS & MEMBERSHIPS	\$	5,500	\$ 6,267	\$ 5,000
001.513.55	TRAINING	\$	3,150	\$ 1,400	\$ 2,500
Total Operating Expenses		\$	36,150	\$ 26,530	\$ 24,000
DEPARTMENT TOTALS		\$	295,876	\$ 299,702	\$ 137,288

514.00 (Town Attorney & Legal Services) General Fund		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>	
LEGAL SERVICES					
001.514.31.	PROFESSIONAL SERVICES - TOWN ATTORNEY	\$	-	\$ -	\$ 25,000
001.514.311	PROFESSIONAL SERVICES - OTHER LEGAL	\$	-	\$ -	\$ 10,000
001.514.40	TRAVEL AND PER DIEM	\$	-	\$ -	\$ 1,500
DEPARTMENT TOTALS		\$	-	\$ -	\$ 36,500

514.00 (Town Attorney & Legal Services) Enterprise Fund		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>	
400.514.31.	PROFESSIONAL SERVICES - TOWN ATTORNEY	\$	-	\$ -	\$ 10,000
400.514.312	PROFESSIONAL SERVICES - OTHER LEGAL	\$	-	\$ -	\$ 10,000
DEPARTMENT TOTALS		\$	-	\$ -	\$ 20,000

521.00 (Police Department) General Fund		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>2022-2023</u>	
PERSONNEL SERVICES					
001.521.10	REGULAR SALARIES AND WAGES	\$	496,885	\$ 361,579	\$ 535,425
001.521.14.	OVERTIME	\$	15,000	\$ 17,688	\$ 15,000
001.521.15.	SPECIAL PAY - Law Enforcement	\$	11,026	\$ 8,705	\$ 8,760
001.521.151	LONGEVITY PAY	\$	-	\$ -	\$ 1,768
001.521.21.	FICA TAXES	\$	40,003	\$ -	\$ 42,913
001.521.22.	RETIREMENT CONTRIBUTIONS	\$	20,221	\$ 14,565	\$ 24,062
001.521.23.	LIFE AND HEALTH INSURANCE	\$	122,650	\$ 85,093	\$ 134,544
Total Personnel Services		\$	705,785	\$ 487,630	\$ 762,471
OPERATING EXPENDITURE / EXPENSES					
001.521.31.	PROFESSIONAL SERVICES	\$	37,000	\$ 42,193	\$ 39,000
001.521.311	PRE-EMPLOYMENT PHYSICALS	\$	-	\$ -	\$ 5,000
001.521.40.	TRAVEL AND PER DIEM	\$	4,000	\$ 2,489	\$ 3,500
001.521.41.	COMMUNICATION SERVICES	\$	27,000	\$ 16,123	\$ -
001.521.42	POSTAGE SERVICES	\$	-	\$ -	\$ 250
001.521.43.	UTILITY SERVICES	\$	3,000	\$ 2,969	\$ -
001.521.44.	RENTALS AND LEASES	\$	3,500	\$ 1,773	\$ 2,500
001.521.46.	REPAIR AND MAINTENANCE SERVICES	\$	8,500	\$ 11,885	\$ 10,000
001.521.47.	PRINTING AND BINDING	\$	2,000	\$ 245	\$ -
001.521.51	OFFICE SUPPLIES	\$	-	\$ -	\$ 1,500
001.521.521.	OPERATING SUPPLIES	\$	17,500	\$ 13,141	\$ 17,500
001.521.522.	FUEL	\$	20,000	\$ 28,237	\$ 30,000
001.521.523	UNIFORMS	\$	4,000	\$ 9,855	\$ 5,000
001.521.524	OPERATING SUPPLIES - K-9 UNIT	\$	-	\$ 457	\$ 1,500
001.521.54.	SUBS, PUBS & MEMBERSHIPS	\$	5,500	\$ 9,467	\$ 10,000
001.521.55.	TRAINING	\$	9,000	\$ 1,278	\$ 10,000
Total Operating Expenses		\$	141,000	\$ 140,111	\$ 135,750
CAPITAL OUTLAY					
001.521.642	LAW ENFORCEMENT GRANTS	\$	11,000	\$ 38,134	\$ 19,000
001.521.643	Police Forfeitures (Restricted)	\$	-	\$ -	\$ 12,000
001.521.644	Public Safety Impact Fees (Restricted)	\$	-	\$ -	\$ 28,500
001.521.641	EQUIPMENT (Vehicles)	\$	14,000	\$ 19,040	\$ 50,000
Total Capital Outlay		\$	25,000	\$ 57,173	\$ 109,500
DEPARTMENT TOTALS		\$	871,785	\$ 684,915	\$ 1,007,721

524.00 (Community Development) General Fund		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>	
PERSONNEL SERVICES					
001.524.12	REGULAR SALARIES AND WAGES	\$	136,041	\$ 115,422	\$ 260,369
001.524.15	LONGEVITY PAY	\$	468	\$ 506	\$ 364
001.524.21.	FICA TAXES	\$	10,443	\$ -	\$ 19,946
001.524.22.	RETIREMENT CONTRIBUTIONS	\$	2,419	\$ 2,140	\$ 2,602
001.524.23.	LIFE AND HEALTH INSURANCE	\$	11,150	\$ 11,690	\$ 56,060
001.524.10	PERSONNEL SERVICES - OTHER	\$	-	\$ -	\$ -
Total Personnel Services		\$	160,521	\$ 129,758	\$ 339,341

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

(Community Development) (Cont'd)

OPERATING EXPENDITURE EXPENSES

001.524.31.	PROFESSIONAL SERVICES	\$ 65,000	\$ 121,132	\$ 7,000
001.524.40.	TRAVEL AND PER DIEM	\$ 2,500	\$ 191	\$ 3,500
001.524.41.	COMMUNICATION SERVICES	\$ 2,000	\$ 1,997	\$ -
001.524.42.	FREIGHT & POSTAGE SERVICES	\$ -	\$ -	\$ -
001.524.43.	UTILITY SERVICES	\$ 2,500	\$ 2,828	\$ -
001.524.44.	RENTALS AND LEASES	\$ 500	\$ 186	\$ 250
001.524.46.	REPAIR AND MAINTENANCE SERVICES	\$ -	\$ -	\$ -
001.524.47.	PRINTING AND BINDING	\$ -	\$ -	\$ -
001.524.49.	ADVERTISING	\$ -	\$ -	\$ 1,000
001.524.51.	OFFICE SUPPLIES	\$ -	\$ -	\$ 1,000
001.524.521	OPERATING SUPPLIES	\$ 6,000	\$ 7,931	\$ 7,000
001.524.522	FUEL	\$ 500	\$ -	\$ 2,000
001.524.54.	SUBS, PUBS & MEMBERSHIPS	\$ 5,000	\$ 6,918	\$ 5,000
001.524.55.	TRAINING	\$ -	\$ -	\$ 6,500
Total Operating Expenses		\$ 84,000	\$ 141,182	\$ 33,250
<u>CAPITAL OUTLAY</u>				
001.524.64	EQUIPMENT (Vehicles)	\$ -	\$ -	\$ 50,000
Total Capital Outlay		\$ -	\$ -	\$ 50,000
<u>DEPARTMENT TOTALS</u>		\$ 244,521	\$ 270,941	\$ 422,591

534.00 (Sanitation Department) General Fund

		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
<u>PERSONNEL SERVICES</u>				
001.534.10	REGULAR SALARIES AND WAGES	\$ 49,373	\$ 43,673	\$ 38,355
001.534.21.	FICA TAXES	\$ 3,777	\$ -	\$ 2,934
001.534.22.	RETIREMENT CONTRIBUTIONS	\$ 883	\$ 70	\$ 2,301
001.534.23.	LIFE AND HEALTH INSURANCE	\$ 11,150	\$ 10,989	\$ 11,212
Total Personnel Services		\$ 65,183	\$ 54,733	\$ 54,803
<u>OPERATING EXPENDITURE / EXPENSES</u>				
001.534.31.	PROFESSIONAL SERVICES (Republic)	\$ 185,000	\$ 131,561	\$ 200,000
001.534.41.	COMMUNICATION SERVICES	\$ 1,000	\$ 1,625	\$ -
001.534.43.	UTILITY SERVICES	\$ -	\$ -	\$ -
001.534.46.	REPAIR AND MAINTENANCE SERVICES	\$ 7,000	\$ 8,826	\$ 7,500
001.534.51.	OFFICE SUPPLIES	\$ -	\$ -	\$ -
001.534.52	OPERATING SUPPLIES	\$ 1,500	\$ 4,866	\$ 2,000
001.534.522.	FUEL	\$ 3,500	\$ 5,660	\$ 6,000
001.534.522.	UNIFORMS	\$ 250	\$ 226	\$ 350
001.534.30.	UTILITY BILLING SOFTWARE	\$ 3,700	\$ -	\$ -
001.534.55.	TRAINING	\$ 500	\$ 1,090	\$ 1,000
Total Operating Expenses		\$ 202,450	\$ 153,855	\$ 216,850
<u>CAPITAL OUTLAY</u>				
001.534.64.	EQUIPMENT	\$ -	\$ 5,984	\$ -
Total Capital Outlay		\$ -	\$ 5,984	\$ -
<u>DEPARTMENT TOTALS</u>		\$ 267,633	\$ 214,572	\$ 271,653

541.00 (Roads and Streets) General Fund

		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
<u>PERSONNEL SERVICES</u>				
001.541.10	REGULAR SALARIES AND WAGES	\$ 49,699	\$ 38,859	\$ 33,835
001.541.21.	FICA TAXES	\$ 3,802	\$ -	\$ 2,588
001.541.22.	RETIREMENT CONTRIBUTIONS	\$ 234	\$ -	\$ 2,030
001.541.23.	LIFE AND HEALTH INSURANCE	\$ 11,150	\$ 12,825	\$ 11,212
Total Personnel Services		\$ 64,885	\$ 51,684	\$ 49,665
<u>OPERATING EXPENDITURE / EXPENSES</u>				
001.541.31.	PROFESSIONAL SERVICES	\$ 15,000	\$ 20,148	\$ -
001.541.41.	COMMUNICATION SERVICES	\$ 500	\$ 1,179	\$ -
001.541.43.	UTILITY SERVICES	\$ 15,000	\$ 22,242	\$ -
001.541.453.	NPDES (Stormwater Expense)	\$ 15,000	\$ 8,937	\$ 10,000
001.541.46.	REPAIR AND MAINTENANCE SERVICES	\$ 12,000	\$ 9,505	\$ 10,000
001.541.521.	OPERATING SUPPLIES	\$ 5,000	\$ 7,198	\$ 5,000
001.541.522.	FUEL	\$ 1,900	\$ 3,658	\$ 3,000
001.541.523.	UNIFORMS	\$ 500	\$ 281	\$ 500
001.541.53.	ROAD MATERIALS AND SUPPLIES	\$ 7,500	\$ 13,010	\$ 10,000
001.541.55.	TRAINING	\$ 1,400	\$ -	\$ -
Total Operating Expenses		\$ 73,800	\$ 86,158	\$ 38,500

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

(Roads and Streets) (Cont'd)

CAPITAL OUTLAY				
001.541.62	Parks Impact Fees (Restricted)	\$ -	\$ -	\$ 70,700
001.541.63	INFRASTRUCTURE (Road Paving)	\$ 1,000,000	\$ 28,169	\$ 2,475,000
001.541.64	EQUIPMENT	\$ -	\$ 5,984	\$ -
Total Capital Outlay		\$ 1,000,000	\$ 34,154	\$ 2,545,700
DEPARTMENT TOTALS		\$ 1,138,685	\$ 171,996	\$ 2,633,865

572.00 (Parks and Recreation) General Fund

		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
PERSONNEL SERVICES				
001.572.10	REGULAR SALARIES AND WAGES	\$ 49,699	\$ 37,068	\$ 38,494
001.572.21	FICA TAXES	\$ 3,802	\$ -	\$ 2,945
001.572.22	RETIREMENT CONTRIBUTIONS	\$ 266	\$ -	\$ 2,310
001.572.23	LIFE AND HEALTH INSURANCE	\$ 11,150	\$ 5,590	\$ 11,212
Total Personnel Services		\$ 64,917	\$ 42,659	\$ 54,961
OPERATING EXPENDITURE / EXPENSES				
001.572.31	PROFESSIONAL SERVICES	\$ 15,000	\$ 18,413	\$ -
001.572.41	COMMUNICATION SERVICES	\$ 500	\$ 1,179	\$ -
001.572.43	UTILITY SERVICES	\$ 3,500	\$ 3,166	\$ -
001.572.46	REPAIR AND MAINTENANCE SERVICES	\$ 5,000	\$ 13,611	\$ 10,000
001.572.521	OPERATING SUPPLIES	\$ 4,500	\$ 4,776	\$ 4,500
001.572.522	FUEL	\$ 2,000	\$ 3,630	\$ 3,500
001.572.522	UNIFORMS	\$ 250	\$ 334	\$ 350
001.572.55	TRAINING	\$ -	\$ -	\$ -
Total Operating Expenses		\$ 30,750	\$ 45,108	\$ 18,350
CAPITAL OUTLAY				
400.572.91	Parks Impact Fees (Restricted)	\$ -	\$ -	\$ 46,100
001.572.64	MACHINERY & EQUIPMENT	\$ 133,000	\$ 5,984	\$ -
400.572.62	INFRASTRUCTURE (FRDAP)	\$ -	\$ -	\$ 100,000
Total Capital Outlay		\$ 133,000	\$ -	\$ 146,100
DEPARTMENT TOTALS		\$ 228,667	\$ 87,766	\$ 219,411

519.00 (General Government) General Fund

		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
OPERATING EXPENDITURE / EXPENSES				
001.519.24	WORKERS' COMPENSATION	\$ 45,000	\$ 23,871	\$ 25,000
001.519.32	ACCOUNTING AND AUDITING	\$ 35,000	\$ 35,323	\$ 35,000
001.519.41	COMMUNICATION SERVICES	\$ -	\$ -	\$ 30,000
001.519.43	UTILITY SERVICES	\$ -	\$ -	\$ 38,000
001.519.45	INSURANCE	\$ -	\$ -	\$ 65,000
001.519.49	TRANSPORTATION (Citrus Connection)	\$ -	\$ -	\$ 10,000
001.511.491	RIDGE LEAGUE DINNER	\$ -	\$ -	\$ 1,470
001.519.492	PWRC Contribution	\$ -	\$ -	\$ 961
001.519.493	INSURANCE Claims (Restricted)	\$ -	\$ -	\$ 75,000
001.519.52	Software Maintenance	\$ -	\$ -	\$ 50,000
001.519.91	CONTINGENCY (General Fund)	\$ -	\$ -	\$ -
001.519.911	Municipal Facilities Impact Fees (Restricted)	\$ -	\$ -	\$ 28,800
DEPARTMENT TOTALS		\$ 80,000	\$ 59,194	\$ 359,231

574.00 (Special Events) General Fund

		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
OPERATING EXPENDITURE / EXPENSES				
001.574.31	PROFESSIONAL SERVICES (Fireworks)	\$ -	\$ -	\$ 15,000
001.574.48	PROMOTIONAL ACTIVITIES (Other)	\$ 10,000	\$ 19,330	\$ 10,000
DEPARTMENT TOTALS		\$ 10,000	\$ 19,330	\$ 25,000

517.00 (Debt Service Payments) (General Fund)

		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
DEBT SERVICE				
001.517.71	PRINCIPAL (Building)	\$ 64,141	\$ 57,191	\$ 57,191
001.517.72	INTEREST (Building)	\$ 48,227	\$ 55,177	\$ 55,177
001.517.73	PRINCIPAL (Police Department Tasers)	\$ -	\$ -	\$ 4,501
001.517.731	PRINCIPAL (Police Department Radios)	\$ -	\$ -	\$ 13,688
001.517.732	PRINCIPAL (Trash Truck)	\$ 34,308	\$ 34,301	\$ 34,301
Total Debt Expenses (General Fund)		\$ 146,676	\$ 146,668	\$ 164,858

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

533.00 (Water Department) Enterprise Fund

	<u>PERSONNEL SERVICES</u>	<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
400.533.10	REGULAR SALARIES AND WAGES	\$ 114,402	\$ 109,409	\$ 157,074
400.533.14	OVERTIME	\$ 15,000	\$ 7,833	\$ 8,000
400.533.15	LONGEVITY PAY	\$ 16,302	\$ 9,794	\$ 364
400.533.151	ON CALL PAY	\$ -	\$ -	\$ 10,403
400.533.21	FICA TAXES	\$ 11,146	\$ -	\$ 13,452
400.533.22	RETIREMENT CONTRIBUTIONS	\$ 10,422	\$ 8,087	\$ 6,869
400.533.23	LIFE AND HEALTH INSURANCE	\$ 33,450	\$ 32,833	\$ 33,636
	Total Personnel Services	\$ 200,722	\$ 167,956	\$ 229,797
	<u>OPERATING EXPENDITURE / EXPENSES</u>			
400.533.31	PROFESSIONAL SERVICES	\$ 15,000	\$ 6,158	\$ 10,000
400.533.311	PROFESSIONAL SERVICES / Engineering	\$ 5,000	\$ 95,533	\$ 55,000
400.533.34	Other Services	\$ 10,000	\$ -	\$ -
400.533.40	TRAVEL AND PER DIEM	\$ 3,200	\$ 1,331	\$ 1,500
400.533.41	COMMUNICATION SERVICES	\$ 4,500	\$ 4,382	\$ 8,000
400.533.42	POSTAGE SERVICES (Utility Billing)	\$ -	\$ -	\$ 4,000
400.533.43	UTILITY SERVICES	\$ 36,000	\$ 26,736	\$ 36,000
400.533.44	RENTALS AND LEASES	\$ 2,500	\$ 3,484	\$ 2,500
400.533.45	INSURANCE	\$ 23,000	\$ 23,428	\$ 30,000
400.533.46	REPAIR AND MAINTENANCE SERVICES	\$ 55,000	\$ 51,130	\$ 55,000
400.533.47	PRINTING AND BINDING (Utility Billing)	\$ 1,500	\$ -	\$ 1,500
400.533.52	OPERATING SUPPLIES - Other	\$ -	\$ 9	\$ -
400.533.521	OPERATING SUPPLIES	\$ 40,000	\$ 39,375	\$ 40,000
400.533.522	FUEL	\$ 6,000	\$ 4,131	\$ 5,000
400.533.523	UNIFORMS	\$ 500	\$ 653	\$ 750
400.533.54	Software Maintenance (Utility Billing)	\$ 4,378	\$ 738	\$ 6,300
400.533.55	TRAINING	\$ 3,000	\$ 1,378	\$ 1,500
400.533.59	DEPRECIATION	\$ -	\$ 157	\$ -
	Total Operating Expenses	\$ 209,578	\$ 258,625	\$ 257,050
	<u>CAPITAL OUTLAY</u>			
400.533.63	INFRASTRUCTURE (Water Plant Improvements)	\$ 32,500	\$ -	\$ 272,500
400.533.64	EQUIPMENT	\$ -	\$ 5,984	\$ -
400.533.631	In House water projects	\$ 25,000	\$ 13,838	\$ -
400.533.632	Water Distribution System	\$ -	\$ 174,835	\$ -
400.533.633	Alternative Water System	\$ 500,000	\$ -	\$ -
	Total Capital Outlay	\$ 557,500	\$ 194,657	\$ 272,500
400.533.91	CONTINGENCY (Enterprise Fund)	\$ -	\$ -	\$ -
	DEPARTMENT TOTALS	\$ 967,800	\$ 621,237	\$ 759,347

535.00 (Sewer / Wastewater Services) Enterprise Fund

	<u>PERSONNEL SERVICES</u>	<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
400.535.10	REGULAR SALARIES AND WAGES	\$ 13,649	\$ 13,657	\$ 91,953
400.535.14	OVERTIME	\$ -	\$ -	\$ -
400.535.15	SPECIAL PAY	\$ -	\$ 1,800	\$ -
400.535.21	FICA TAXES	\$ 1,044	\$ -	\$ 7,034
400.535.22	RETIREMENT CONTRIBUTIONS	\$ -	\$ -	\$ 1,498
400.535.23	LIFE AND HEALTH INSURANCE	\$ -	\$ -	\$ 22,424
	Total Personnel Services	\$ 14,693	\$ 15,457	\$ 122,909
	<u>OPERATING EXPENDITURE / EXPENSES</u>			
400.535.31	PROFESSIONAL SERVICES	\$ 5,000	\$ 551,848	\$ 25,000
400.535.32	ACCOUNTING AND AUDITING	\$ -	\$ 30	\$ -
400.535.40	TRAVEL AND PER DIEM	\$ 2,000	\$ -	\$ -
400.535.41	COMMUNICATION SERVICES	\$ 1,500	\$ 1,179	\$ 1,500
400.535.43	UTILITY SERVICES	\$ 1,500	\$ 1,810	\$ 2,000
400.535.44	RENTALS AND LEASES	\$ -	\$ -	\$ -
400.535.45	INSURANCE	\$ 7,000	\$ -	\$ 7,000
400.535.46	REPAIR AND MAINTENANCE SERVICES	\$ 5,500	\$ 7,680	\$ 7,000
400.535.52	OPERATING SUPPLIES	\$ 17,000	\$ 17,253	\$ 18,000
400.535.522	FUEL	\$ -	\$ -	\$ -
400.535.523	UNIFORMS	\$ -	\$ -	\$ -
400.535.54	SUBS, PUBS & MEMBERSHIPS	\$ 250	\$ 200	\$ 250
400.535.55	TRAINING	\$ 2,000	\$ 141	\$ 1,000
	Total Operating Expenses	\$ 41,750	\$ 580,141	\$ 61,750

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

(Sewer / Wastewater Services) (Cont'd)

CAPITAL OUTLAY

400.535.63.	INFRASTRUCTURE (Wastewater Project)	\$ -	\$ 101,809	\$ 10,960,120
400.535.65	INFRASTRUCTURE (319 Sewer Connection)	\$ -	\$ 6,250	\$ 838,621
Total Capital Outlay		\$ -	\$ 108,059	\$ 11,798,741
400.535.91	CONTINGENCY (Enterprise Fund)	\$ -	\$ -	\$ -
DEPARTMENT TOTALS		\$ 56,443	\$ 703,657	\$ 11,983,400

517.00 (Debt Services Payments) (Enterprise Fund)

DEBT SERVICE

		<u>FY 2021-22</u>	<u>2021-2022 Actual</u>	<u>FY 2022-2023</u>
400.517.71.	PRINCIPAL (SR 17 SRF)	\$ 3,078	\$ 3,078	\$ 3,080
400.517.712.	PRINCIPAL (WDS Bridge Loan - USDA)	\$ 45,883	\$ 39,688	\$ 39,700
400.517.713.	PRINCIPAL (Water Treatment Plant)	\$ 104,267	\$ -	\$ 104,268
400.517.731.	PRINCIPAL (Hydrogen Sulfide)	\$ 12,294	\$ 12,294	\$ 12,294
Total Debt Expenses (Enterprise Fund)		\$ 165,522	\$ 55,060	\$ 159,342

Total	\$ 4,613,116	\$ 4,220,705	\$ 19,932,287
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2022-2023 FY Annual Budget - Summary

Fund	Department	Personnel	Operating	Capital Outlay	Debt Services	Total
511	Town Council	\$ 6,300	\$ 13,700	\$ 1,500,000	\$ -	\$ 1,520,000
512	Administrator / Clerk	\$ 173,829	\$ 38,250	\$ -	\$ -	\$ 212,079
513	Finance Department	\$ 113,288	\$ 24,000	\$ -	\$ -	\$ 137,288
514	Attorney	\$ -	\$ 36,500	\$ -	\$ -	\$ 36,500
514	Attorney	\$ -	\$ 20,000	\$ -	\$ -	\$ 20,000
517	Debt Service	\$ -	\$ -	\$ -	\$ 164,858	\$ 164,858
517	Debt Service	\$ -	\$ -	\$ -	\$ 159,342	\$ 159,342
519	General Government	\$ -	\$ 359,231	\$ -	\$ -	\$ 359,231
521	Police Department	\$ 762,471	\$ 135,750	\$ 109,500	\$ -	\$ 1,007,721
524	Community Development	\$ 339,341	\$ 33,250	\$ 50,000	\$ -	\$ 422,591
533	Water Department	\$ 229,797	\$ 257,050	\$ 272,500	\$ -	\$ 759,347
534	Sanitation Department	\$ 54,803	\$ 216,850	\$ -	\$ -	\$ 271,653
535	Wastewater Department	\$ 122,909	\$ 61,750	\$ 11,798,741	\$ -	\$ 11,983,400
541	Roads & Streets	\$ 49,665	\$ 38,500	\$ 2,545,700	\$ -	\$ 2,633,865
572	Parks & Recreation	\$ 54,961	\$ 18,350	\$ 146,100	\$ -	\$ 219,411
574	Special Events	\$ -	\$ 25,000	\$ -	\$ -	\$ 25,000
Totals		\$ 1,907,365	\$ 1,278,181	\$ 16,422,541	\$ 324,200	\$ 19,932,287

LONG TERM DEBT SUMMARY as of September 30, 2022

GENERAL FUND

LENDER	PROJECT	INTEREST RATE	ANNUAL DEBT SERVICE	BALANCE	MATURITY	PLEDGED/SECURITY
Motorola	PR Radio Lease/Purchase	3.880%	\$ 13,688	\$ 35,331	2/1/25	PD Radios
Axon Enterprise	Police Department Tasers	0.000%	\$ 4,501	\$ 9,002	7/17/25	Tasers
BMO Harris Equipment Finance Company	Claw Truck Loan	4.120%	\$ 34,301	\$ 34,066	10/17/23	Claw Truck
Southstate Bank	Town Hall Renovation	3.750%	\$ 112,368	\$ 1,261,123	11/1/39	None

Total Due \$ 164,858 \$ 1,339,522

ENTERPRISE FUND

LENDER	PROJECT	INTEREST RATE	ANNUAL DEBT SERVICE	BALANCE	MATURITY	PLEDGED/SECURITY
FDEP	WW Collection and Transmission - 531640	0.470%	\$ 3,024	\$ 48,406	11/15/41	\$57,660 in the Loan Repayment Reserve Acct
FDEP	Hydrogen Sulfide Removal	2.740%	\$ 12,293	\$ 185,276	12/15/38	Water Net Revenues
USDA	2020 Water Revenue Bonds	1.250%	\$ 39,790	\$ 1,215,210	12/18/60	Water Net Revenues
USDA	2011 Water Plant Construction	2.750%	\$ 104,267	\$ 2,006,911	9/1/51	Water Net Revenues

Total Due \$ 159,374 \$ 3,455,803

TOWN OF LAKE HAMILTON

PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

TOWN OF LAKE HAMILTON, FLORIDA

CAPITAL IMPROVEMENTS PROGRAM - Fiscal Year 2023 - 2027

General Project Description

Enterprise Fund

WATER USE PERMIT PROJECTS	FY 21/22	Source	FY 22/23	Source	FY 23/24	Source	FY 24/25	Source	FY 25/26	Source	FY 26/27	Source
Water Plant Review & Facilities Plan	\$ -		\$ 24,500	Dev	\$ -		\$ -		\$ -		\$ -	
Water Treatment Plant Site Improvements	\$ -		\$ 50,000	Dev	\$ 50,000	Dev	\$ 50,000	Dev	\$ 150,000		\$ -	
6MGD High Service Pumps (3)	\$ -		\$ -		\$ 120,000	Dev	\$ 240,000	Dev	\$ -		\$ -	
3 MGD Jockey Pumps (2)	\$ -		\$ -		\$ 100,000	Dev	\$ 100,000	Dev	\$ -		\$ -	
Upper Floridan Wells (2)	\$ -		\$ -		\$ 200,000	Dev	\$ 400,000	Dev	\$ 600,000		\$ -	
Ground Storage Tank (1 mg) Design	\$ -		\$ 48,000	Dev	\$ -		\$ -		\$ -		\$ -	
Ground Storage Tank (1 mg) Construction	\$ -		\$ 150,000	Dev	\$ 450,000	Dev	\$ -		\$ -		\$ -	
Raw water supply line (\$115/ft x 6,800 ft)	\$ -		\$ -		\$ -		\$ 782,000	Dev	\$ -		\$ -	
TOTAL WATER PROJECTS	\$ -		\$ 272,500		\$ 920,000		\$ 1,572,000		\$ 750,000		\$ -	

Wastewater Project	FY 21/22	Source	FY 22/23	Source	FY 23/24	Source	FY 24/25	Source	FY 25/26	Source	FY 26/27	Source
Wastewater Treatment Facility and Septic - to - Sewer Construction	\$ -		\$ 4,452,895	SRF	\$ -		\$ -		\$ -		\$ -	
	\$ -		\$ 3,000,000	Dev	\$ -		\$ -		\$ -		\$ -	
	\$ -		\$ 3,507,225	SRF Loan	\$ -		\$ -		\$ -		\$ -	
319 Sewer Connection Program	\$ -		\$ 838,621	SRF/EF	\$ -		\$ -		\$ -		\$ -	
Sub-Total	\$ -	\$ -	\$ 11,798,741		\$ -		\$ -		\$ -		\$ -	

Wastewater Treatment Facility - Ph. II	FY 21/22	Source	FY 22/23	Source	FY 23/24	Source	FY 24/25	Source	FY 25/26	Source	FY 26/27	Source
Preliminary Engineering Report	\$ -		\$ -		\$ -		\$ -		\$ -		\$ -	
Design	\$ -		\$ -		\$ 196,000		\$ -		\$ -		\$ -	
Engineer Construction Services	\$ -		\$ -		\$ 90,000		\$ -		\$ -		\$ -	
Construction	\$ -		\$ -		\$ 2,800,000		\$ -		\$ -		\$ -	
Sub-Total	\$ -		\$ -		\$ 3,086,000		\$ -		\$ -		\$ -	

TOTAL WASTEWATER PROJECTS	\$ -		\$ 12,071,241		\$ 4,006,000		\$ 1,572,000		\$ 750,000		\$ -	
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TOTAL Enterprise PROJECT	\$ -		\$ 12,343,741		\$ 4,926,000		\$ 3,144,000		\$ 1,500,000		\$ -	
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Funding Codes:												
ABC - Atlantic Blue Capital - Developer			GF - General Fund			FBIP - Florida Boating Improvement Program			WRCAP - Water Reserve Capacity			
FRDAP - Florida Recreation Development Assistance Program			GT - Gas Taxes			Heartland - Heartland Grant/Loan			WWRCAP - Wastewater Reserve Capacity			
Reveses - Town unrestricted reserves			EF - Enterprise Fund			USDA - U. S. Department of Agriculture						

TOWN OF LAKE HAMILTON, FLORIDA

CAPITAL IMPROVEMENTS PROGRAM - Fiscal Year 2023- 2027

General Project Description

General Fund

PARKS AND RECREATION PROJECTS	FY 21/22	Source	FY 22/23	Source	FY 23/24	Source	FY 24/25	Source	FY 25/26	Source	FY 26/27	Source
SAMPLE PARK												
Phase II Improvements	\$ 50,000		\$ -		\$ 50,000	FRDAP	\$ -		\$ -		\$ -	
Boat Ramp Replacement	\$ -		\$ -		\$200,000	FBIP?	\$ -		\$ -		\$ -	
GUNTER PARK												
Phase II Improvements	\$ 50,000		\$ 50,000	FRDAP	\$ -		\$ -		\$ -		\$ -	
BRUCE MARTIN PARK												
Phase II Improvements	\$ -		\$ -		\$ -		\$ 50,000	FRDAP	\$ -		\$ -	
DETOUR ROAD BALL FIELD												
Phase I Improvements	\$ -		\$ 50,000	FRDAP	\$ -		\$ -		\$ -		\$ -	
Phase II Improvements	\$ -		\$ -		\$ -		\$ 50,000	FRDAP	\$ -		\$ -	
VETERANS PARK												
No Projects scheduled	\$ -		\$ -		\$ -		\$ -		\$ -		\$ -	
Parks & Recreation Total	\$ 100,000		\$ 100,000		\$ 250,000		\$ 100,000		\$ -		\$ -	

ROAD AND STREET PROJECTS	FY 21/22	Source	FY 22/23	Source	FY 23/24	Source	FY 24/25	Source	FY 25/26	Source	FY 26/27	Source
Road Repaving & Drainage Project	\$ -		\$ 1,975,000	Heartland	\$ -		\$ -		\$ -		\$ -	
	\$ -		\$ 500,000	GF	\$ -		\$ -		\$ -		\$ -	
Roads and Streets Total	\$ -		\$ 2,475,000		\$ -		\$ -		\$ -		\$ -	

POLICE DEPARTMENT	FY 21/22	Source	FY 22/23	Source	FY 23/24	Source	FY 24/25	Source	FY 25/26	Source	FY 26/27	Source
Radio Upgrade project	\$ -		\$ 13,688	GF	\$ 13,688	GF	\$ 13,688	GF	\$ -		\$ -	
Axon EPMD Upgrades (Tasers)	\$ -		\$ 4,501	GF	\$ 4,501	GF	\$ 4,501	GF	\$ -		\$ -	
Total	\$ -		\$ 18,189		\$ 18,189		\$ 18,189		\$ -		\$ -	

TOWN FACILITIES	FY 21/22	Source	FY 22/23	Source	FY 23/24	Source	FY 24/25	Source	FY 25/26	Source	FY 26/27	Source
Town Hall Landscaping	\$ -		\$ -	GF	\$ 20,000	GF	\$ 10,000	GF	\$ -		\$ -	
Community Center	\$ -		\$ 1,500,000	FL-Leg	\$ -		\$ -		\$ -		\$ -	
Town Facilities Totals	\$ -		\$ 1,500,000		\$ 20,000		\$ 10,000.00		\$ -		\$ -	

VEHICLE REPLACEMENT PROGRAM	FY 21/22	Source	FY 22/23	Source	FY 23/24	Source	FY 24/25	Source	FY 25/26	Source	FY 26/27	Source
Police Cruiser Replacement Rental Program	\$ 40,000	GF	\$ 50,000	GF	\$ 100,000	GF	\$ 50,000	GF	\$ 50,000	GF	\$ 50,000	GF
Building Department Vehicles	\$ -		\$ 50,000	GF	\$ -		\$ -		\$ -		\$ -	
PW - Vehicle Replacement Program	\$ 25,000	PW	\$ -		\$ -		\$ 38,000		\$ -		\$ 38,000	EP
Trash Truck	\$ -		\$ 34,308	GF	\$ -		\$ -		\$ -		\$ -	
Vehicle Replacements Totals	\$ 65,000		\$ 134,308		\$ 100,000		\$ 88,000		\$ 50,000		\$ 88,000	

TOTAL GENERAL FUND PROJECT	\$ 165,000		\$ 4,227,497		\$ 388,189		\$ 216,189		\$ 50,000		\$ 88,000	
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Funding Codes:												
ABC - Atlantic Blue Capital - Developer			GF - General Fund			FBIP - Florida Boating Improvement Program			WRCAP - Water Reserve Capacity			
FRDAP - Florida Recreation Development Assistance Program			GT - Gas Taxes			Heartland - Heartland Grant/Loan			WWRCAP - Wastewater Reserve Capacity			
Reveses - Town unrestricted reserves			EF - Enterprise Fund			USDA - U. S. Department of Agriculture						

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

Town of Lake Hamilton Revenue Projections FY 2022-2023

	Final Budget 2021 - 2022		2022-2023 Projected
	Mil Rate 8.4276	As of 8/30/2022	Mil Rate 8.4276
311.000 · Ad Valorem Taxes	\$ 779,625	\$ 799,353	\$ 925,370
312.000 · Local Option, Use & Fuel Taxes			
312.300 · County 9th Cent Voted Fuel Tax	\$ 12,500	\$ 11,011	\$ 12,000
312.410 · 1st Local Option Fuel Tax	\$ 71,911	\$ 61,678	\$ 77,700
312.420 · 2nd Local Option Fuel Tax	\$ 45,354	\$ 39,582	\$ 49,290
Totals	\$ 129,765	\$ 112,271	\$ 138,990
314.000 · Utility Services Taxes			
314.100 · Electricity	\$ 154,000	\$ 131,603	\$ 160,000
314.300 · Water	\$ 63,600	\$ 80,263	\$ 85,000
314.800 · Propane	\$ 4,950	\$ 3,865	\$ 5,000
Totals	\$ 222,550	\$ 215,731	\$ 250,000
315.100 State Communication Services Taxes			
315.100 · Communications Services Taxes	\$ 20,722	\$ 18,082	\$ 20,800
Totals	\$ 20,722	\$ 18,082	\$ 20,800
316.000 · Local Business Tax			
316.001 · Local Business Tax	\$ 6,000	\$ 2,735	\$ 5,000
316.002 · From County	\$ 1,000	\$ 648	\$ 1,000
Totals	\$ 7,000	\$ 3,383	\$ 6,000
322.00 · Permits			
322.100 · Building Permits	\$ 75,000	\$ 70,637	\$ 90,000
322.200 · BOCC Admin Fee - Impact Fees	\$ 5,743	\$ 4,499	\$ 5,000
Totals	\$ 80,743	\$ 75,136	\$ 95,000
323.000 · Franchise Fees			
323.100 · Electricity - Other	\$ 125,000	\$ 109,143	\$ 130,000
323.700 · Republic Services Franchise Fee	\$ 32,000	\$ 31,282	\$ 35,000
Totals	\$ 157,000	\$ 140,425	\$ 165,000
324.000 · Impact Fees			
324.110 · Impact Fees - Residential - Public Safety	\$ -	\$ -	\$ 28,500
324.120 · Impact Fees - Commercial-Public Safety	\$ -	\$ -	\$ -
324.310 · Impact Fees - Residential - Roads	\$ -	\$ -	\$ 70,700
324.320 · Impact Fees - Commercial - Roads	\$ -	\$ -	\$ -
324.610 · Impact Fees - Residential - Parks	\$ -	\$ -	\$ 46,100
324.620 · Impact Fees - Commercial - Parks	\$ -	\$ -	\$ -
324.910 · Impact Fees - Residential-Municipal Facilities	\$ -	\$ -	\$ 28,800
324.920 · Impact Fees - Commercial-Municipal Facilities	\$ -	\$ -	\$ -
GF Impact Fee - Totals	\$ -	\$ -	\$ 174,100
324.210 · Impact Fees - Water - Residential	\$ 33,817	\$ 33,050	\$ 69,570
324.211 · Impact Fees - Sewer Residential	\$ -	\$ -	\$ -
324.220 · Impact Fees - Commercial- Water	\$ -	\$ 4,639	\$ 4,500
324.221 · Impact Fees - Commercial-Sewer	\$ -	\$ -	\$ 4,000
EF Impact Fee - Total	\$ 33,817	\$ 37,688	\$ 78,070
329.000 · Other Permits Special Assessments			
329.001 · Golf Cart Registrations	\$ 105	\$ 70	\$ 105
329.002 · Planning Department Fees	\$ 125,000	\$ 151,731	\$ 125,000
Totals	\$ 125,105	\$ 151,801	\$ 125,105

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

331.000 · FEDERAL GRANTS

331.200 · Public Safety

331.201 · JAGD Grant	\$ 1,000	\$ -	\$ -
331.202 · Police Grant JAGC	\$ 10,000	\$ 27,973	\$ 19,000
Totals	\$ 11,000	\$ 27,973	\$ 19,000

331.300 · Physical Environment

331.310 · Water Supply System	\$ -	\$ 415,517	\$ -
Totals	\$ -	\$ 415,517	\$ -

334.000 STATE GRANTS

334.000 · State Grants

334.100 · Community Center Grant	\$ -	\$ -	\$ 1,500,000
334.310 · Water Supply System	\$ -	\$ (124,610)	
334.350 · Sewer/Wastewater (SRF Grant)	\$ -	\$ -	\$ 4,452,895
334.351 · Sewer/Wastewater (SRF Loan)	\$ -	\$ -	\$ 3,507,225
334.352 · Sewer / Wastewater (319 Program)	\$ -	\$ -	\$ 438,823
334.360 · Stormwater Management	\$ -	\$ -	\$ -
Totals	\$ -	\$ (124,610)	\$ 8,398,943

334.490 -Transportation

334.410 Heartland Project - Roads & Drainage	\$ -	\$ -	\$ 1,975,000
	\$ -	\$ -	\$ 1,975,000

334.700 · Culture and Recreation

334.701 · FRDAP - Florida Recreation Development Assistance Program	\$ 118,000	\$ -	\$ 100,000
334.702 · FBIP - Florida Boating Improvement Program	\$ -	\$ -	\$ -
Totals	\$ 118,000	\$ -	\$ 100,000

335.000 · State Shared Revenues

335.100 · General Government

335.140 · Mobile Home License Tax	\$ 100	\$ 148	\$ 180
335.150 · Alcoholic Beverage License Tax	\$ 195	\$ 930	\$ 1,000
335.180 · Local Govt 1/2 Cent Sales Tax	\$ 108,375	\$ 106,830	\$ 110,323
335.190 · State Revenue Sharing .08 Tax	\$ 57,902	\$ 44,524	\$ 61,102
Totals	\$ 166,572	\$ 152,433	\$ 172,605

335.200 · Public Safety

335.230 · Emergency Management Assistance	\$ -	\$ 374,638	\$ -
335.200 · Public Safety - Other	\$ -	\$ 5	\$ -
Totals	\$ -	\$ 374,643	\$ -

340.000 · Charges for Services

341.000 · General Government

341.901 · General Misc.	\$ 1,000	\$ -	\$ -
341.902 · Lien Search	\$ 1,500	\$ 2,065	\$ 1,800
341.900 · Other General Govt	\$ -	\$ -	\$ -
Totals	\$ 2,500	\$ 2,065	\$ 1,800

342.000 · Public Safety

342.100 · Law Enforcement Services	\$ 1,000	\$ 928	\$ 1,000
342.500 · Code Enforcement Fees	\$ 12,500	\$ 544	\$ 10,000
Totals	\$ 13,500	\$ 1,472	\$ 11,000

343.000 · Physical Environment

343.300 Service Charge – Water Utility

343.301 · Water Income	\$ 636,000	\$ 494,276	\$ 618,000
343.302 · Water Meter Set Fees	\$ 10,767	\$ 13,289	\$ 25,000
343.303 · Cross Connection Program	\$ 6,795	\$ 8,055	\$ 7,600
343.304 · Administrative Fees	\$ -	\$ 80	\$ -
343.305 · Connect/Reconnect Fees	\$ 13,000	\$ 13,140	\$ 15,000
343.306 · Capacity fee reservations	\$ 500,000	\$ 345,574	\$ 345,574
Totals	\$ 1,166,562	\$ 874,414	\$ 1,011,174

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

<i>343.400 · Garbage/Solid Waste</i>			
343.401 · Sanitation Income/Republic	\$ 152,304	\$ 120,302	\$ 158,661
343.402 · Trash Collection	\$ 104,208	\$ 82,326	\$ 104,328
Totals	\$ 256,512	\$ 202,628	\$ 262,989
<i>343.500 · Sewer/Wastewater Utility</i>			
343.500 · Wastewater Utility fee	\$ 45,000	\$ 42,447	\$ 45,000
343.501 · Wastewater Capacity (Developer)	\$ -	\$ 750,000	\$ 3,000,000
Totals	\$ 45,000	\$ 792,447	\$ 3,045,000
343.550 · Stormwater Management Fees	\$ 50,520	\$ 37,667	\$ 45,627
Totals	\$ 50,520	\$ 37,667	\$ 45,627
<i>343.900 · Other Physical Environment Charges</i>			
343.901 · Late Fee Income	\$ 22,000	\$ 29,742	\$ 28,000
343.902 · Return Check Revenue	\$ 1,200	\$ 2,650	\$ 2,800
343.900 · Other Physical Environment Charges - Other	\$ -	\$ -	\$ -
Totals	\$ 23,200	\$ 32,392	\$ 30,800
<i>344.000 · Transportation (User Fees)</i>			
344.100 · FDOT Lighting Maintenance Agree	\$ -	\$ -	\$ -
Totals	\$ -	\$ -	\$ -
<i>347.000 · Culture and Recreation</i>			
347.400 · Special Events	\$ 50	\$ -	\$ 5,000
Totals	\$ 50	\$ -	\$ 5,000
343.399 Conversion Income	\$ -	\$ (1,065)	\$ -
Totals	\$ -	\$ (1,065)	\$ -
<i>351.100 · COURT-ORDERED JUDGMENTS AND FINES</i>			
<i>351.000 · Judgements</i>			
<i>351.100 · County Court Criminal</i>			
351.101 · Police Fines & Forfeitures	\$ 25,000	\$ 12,729	\$ 12,000
351.102 · Police Education	\$ 2,000	\$ 1,120	\$ 1,000
351.103 · Clerk of County Court Fees	\$ 8,000	\$ -	\$ -
351.104 · Police Investigations	\$ 5,000	\$ 1,299	\$ 1,300
351.105 · Police Restitution	\$ -	\$ -	\$ -
351.100 · County Court Criminal - Other	\$ -	\$ -	\$ -
Totals	\$ 40,000	\$ 15,148	\$ 14,300
<i>360.000 · Miscellaneous Revenues</i>			
360.100 · Police K-9 Unit Donations	\$ -	\$ -	\$ 1,500
Totals	\$ -	\$ -	\$ 1,500
<i>361.000 · Interest and Other Earnings</i>			
361.100 · Interest	\$ 6,500	\$ 710	\$ 1,000
364.000 Sales - Disposition of Fixed Assets	\$ 5,000	\$ -	\$ -
365.000 Sales - Surplus Scrap	\$ -	\$ -	\$ -
366.000 Contributions/Donations-Other	\$ 5,000	\$ 3,436	\$ 4,000
369.000 Other	\$ 1,500	\$ 66,422	\$ 50,000
Totals	\$ 18,000	\$ 70,567	\$ 55,000
<i>369.000 Settlements</i>			
369.300 Settlements - Insurance Claims (Restricted)	\$ -	\$ -	\$ 75,000
<i>380.000 · Non-Operating Revenue</i>			
382.000 · Interfund Group Transfers In (Water Plant)	\$ -	\$ -	\$ 272,500
381.000 · Interfund Group Transfers In (Heartland Grant / GF)	\$ -	\$ -	\$ 500,000
381.000 · Interfund Group Transfers In -Other	\$ -	\$ -	\$ 56,816
381.000 · Interfund Group Transfers In (319 Sewer Connect)	\$ 645,373	\$ -	\$ 399,798
384.000 · Debt Proceeds	\$ 500,000	\$ -	\$ -
Totals	\$ 1,145,373	\$ -	\$ 1,229,114
Revenues	\$ 4,613,116	\$ 4,427,561	\$ 19,932,287

TOWN OF LAKE HAMILTON
PROPOSED ANNUAL 2022/2023 FISCAL YEAR BUDGET

TOWN OF LAKE HAMILTON - FISCAL YEAR 2022-2023 BUDGET SUMMARY OF ESTIMATED REVENUES AND EXPENDITURES					
ESTIMATED REVENUES		GENERAL	CAPITAL	ENTERPRISE	TOTAL ALL
		FUND	PROJECT	FUND	FUNDS
Taxes:	Millage per \$1000 = 8.4276				
Ad Valorem Taxes		925,370	0	0	925,370
Sales and Fuel Taxes		165,790	0	0	165,790
Franchise Fees		165,000	0	0	165,000
Utility Service Taxes		250,000	0	0	250,000
State Revenue Sharing		172,605	0	0	172,605
Charges for Services		500,516	3,000,000	1,165,044	4,665,560
Intergovernmental Revenue		19,000	11,973,943	0	11,992,943
Fines & Forfeitures		14,300	0	0	14,300
Miscellaneous Revenues		131,500	0	0	131,500
Licenses and Permits		220,105	0	0	220,105
TOTAL RESOURCES		2,557,523	14,973,943	1,165,044	18,703,173
Interfund Transfers		334,195	1,172,298	(334,195)	1,172,298
Fund Balances/Reserves/Net Assets		56,816			56,816
TOTAL REVENUES and TRANSFERS		2,955,197	16,146,241	830,849	19,932,287
EXPENDITURES					
General Government		1,081,958	1,500,000	0	2,581,751
Public Safety		1,430,312	0	0	1,430,312
Physical Environment		0	12,071,241	671,507	12,742,748
Culture/Recreation		119,411	100,000	0	219,411
Transportation		158,658	2,475,000	0	2,633,665
Debt Services		164,858		159,342	324,200
TOTAL EXPENDITURES		2,955,197	16,146,241	830,849	19,932,287
Fund Balances/Reserves/Net Assets		0	0	0	0
TOTAL EXPENDITURES AND RESERVE ADDITIONS		2,955,197	16,146,241	830,849	19,932,287
The tentative adopted budget is on file at Town of Lake Hamilton Town Hall for public inspection.					

RESOLUTION R-2022-13

A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF LAKE HAMILTON, FLORIDA; ADOPTING THE MILLAGE RATE FOR FISCAL YEAR 2022-2023 BEGINNING AT 12:01 AM ON OCTOBER 1, 2022, AND ENDING SEPTEMBER 30, 2023; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, after a public hearing held at a duly noticed meeting of the Town Council of the Town of Lake Hamilton, Florida the 2022-2023 millage was presented to the people of the Town of Lake Hamilton; and

WHEREAS, the millage rate of 8.4276 generates the minimum funds necessary from ad valorem taxes to meet the Town of Lake Hamilton's needs for essential services; and

WHEREAS, public comments and input were considered by the Town Council of the Town of Lake Hamilton in setting the millage.

NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF LAKE HAMILTON, FLORIDA:

SECTION 1.

1. The millage rate of 8.4276 (dollars per thousand) will result in a 12.45% increase over the rolled back rate of 7.4944 (dollars per thousand).
2. The millage rate of 8.4276 (dollars per thousand) is hereby adopted as the final millage rate.

SECTION 2. CONFLICTS.

1. That all resolutions or parts thereof in conflict herewith, be and the same are hereby repealed.

SECTION 3. SEVERABILITY.

1. That if any section, paragraph, clause, sentence, item, word or provision of this Resolution be declared invalid by a court of competent jurisdiction, such decision shall not affect the validity of the Resolution as a whole or any part thereof, not so declared to be invalid.

SECTION 4. EFFECTIVE DATE.

1. This Resolution shall take effect immediately upon adoption.

Resolution R-2022-13

2022/2023 Tentative Millage

Page 2

INTRODUCED AND PASSED on first reading at the Trim Hearing of the Town Council of Lake Hamilton, Florida, held this 13th day of September 2022.

TOWN OF LAKE HAMILTON, FLORIDA

MICHAEL KEHOE, MAYOR

ATTEST:

BRITTNEY SANDOVAL SOTO, TOWN CLERK

Record of Vote	Yes	No
Roberson		
Tomlinson		
O'Neill		
Wagner		
Kehoe		

PASSED AND ADOPTED on second reading at the Budget Hearing of the Town Council of Lake Hamilton, Florida, held this 20th day of September 2022.

MICHAEL KEHOE, MAYOR

ATTEST:

BRITTNEY SANDOVAL SOTO, TOWN CLERK

Approved as to form:

HEATHER R MAXWELL, ESQ., TOWN ATTORNEY

Record of Vote	Yes	No
Roberson		

Resolution R-2022-13

2022/2023 Tentative Millage

Page 3

Tomlinson		
O'Neill		
Wagner		
Kehoe		

RESOLUTION R-2022-14

A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF LAKE HAMILTON, FLORIDA; ADOPTING A BUDGET FOR FISCAL YEAR 2022-2023 BEGINNING AT 12:01 AM ON OCTOBER 1, 2022, AND ENDING SEPTEMBER 30, 2023; REFLECTING THE REVENUE GENERATED TOGETHER WITH THE SOURCES OF THE REVENUE; DELINEATING THE EXPENDITURES BY DEPARTMENT OF ACTIVITY; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, after a public hearing held at a duly noticed meeting of the Town Council of the Town of Lake Hamilton, Florida the 2022-2023 budget was presented to the people of the Town of Lake Hamilton: and

WHEREAS, public comments and input were considered by the Town Council of the Town of Lake Hamilton in approving the attached budget.

NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF LAKE HAMILTON, FLORIDA:

SECTION 1.

1. The Fiscal year 2022-2023 Budget attached hereto is adopted and incorporated by reference.
2. The 5-year Capital Improvement Plan for 2023-2027 attached hereto is adopted and incorporated by reference.
3. That the sums of money delineated therein, or as much as may be authorized by law, or as may be needed or deemed necessary to defray the expenses and liabilities of the Town are herein specified.

SECTION 2. CONFLICTS.

1. That all resolutions or parts thereof in conflict herewith, be and the same are hereby repealed.

SECTION 3. SEVERABILITY.

1. That if any section, paragraph, clause, sentence, item, word, or provision of this Resolution be declared invalid by a court of competent jurisdiction, such decision shall not affect the validity of the Resolution as a whole or any part thereof, not so declared to be invalid.

SECTION 4. EFFECTIVE DATE.

1. This Resolution shall take effect immediately upon its adoption.

INTRODUCED AND PASSED on first reading at the Trim Hearing of the Town Council of Lake Hamilton, Florida, held this 13th day of September 2022.

TOWN OF LAKE HAMILTON, FLORIDA

MICHAEL KEHOE, MAYOR

ATTEST:

BRITTNEY SANDOVAL SOTO, TOWN CLERK

Record of Vote	Yes	No
Roberson		
Tomlinson		
O'Neill		
Wagner		
Kehoe		

PASSED AND ADOPTED on second reading at the Budget Hearing of the Town Council of Lake Hamilton, Florida, held this 20th day of September 2022.

MICHAEL KEHOE, MAYOR

ATTEST:

BRITTNEY SANDOVALSOTO, TOWN CLERK

Approved as to form:

HEATHER R MAXWELL, ESQ., TOWN ATTORNEY

Resolution R-2022-14

Page 3

Record of Vote	Yes	No
Roberson		
Tomlinson		
O'Neill		
Wagner		
Kehoe		



022

TOWN OF LAKE HAMILTON BUILDING PERMIT APPLICATION

100 Smith Ave
PO Box 126
Lake Hamilton, FL 33851
(863) 439-1910
Fax: (863) 439-1421

TOTAL DUE: \$ _____

Date of Application: _____

Code in effect is the Florida Building Code 7th Edition

Property Address/Location: _____ Parcel ID#: _____

Sq. Ft. of Building: _____ Septic: _____ Meter Size Req: _____ Meter#: _____

Application is hereby made to obtain a permit to do the work and installations as indicated. I certify no work or installation has commenced prior to the issuance of a permit and all work will be performed to meet the standards of all laws regulating construction in this jurisdiction. I understand a separate permit must be secured for any additional work not described on this application. I also agree to pay permit fees based on the Florida Building Code or furnish a signed contract for this construction. ALL COMMERCIAL NEW CONSTRUCTION, ALTERATIONS, AND/OR ADDITIONS REQUIRE TECHNICAL REVIEW BOARD APPROVAL. SCHEDULE AN APPOINTMENT WITH THE TOWN PLANNER FOR A PRE-REVIEW CONSULTATION.

Type of Permit: (x) all that apply:

Building ☐ Electrical ☐ Mechanical ☐ Plumbing ☐ Irrigation ☐ Fence ☐ Pool ☐ Shed ☐
Residential ☐ Commercial ☐ Warehouse ☐ New ☐ Alteration ☐ Addition ☐ Repair ☐ Roof

Description of work: _____

Cost of construction: \$ _____ Type of construction: _____ Occupancy Group: _____

Owner Name: _____ Owner Phone #: _____

Owner Address: _____ City: _____ State: _____ Zip: _____

CONTRACTOR INFORMATION

Contractor Name: _____ Business Name: _____ Business Address: _____

City: _____ State: _____ Zip: _____

Phone #: _____ Fax #: _____ License #: _____

Sub-Contractor Name(s) and License Number(s): _____

Elec: _____ Lic #: _____ Mech: _____ Lic #: _____

Plbg: _____ Lic #: _____ Roof: _____ Lic #: _____

Irrigation: _____ Lic #: _____ Landscaping: _____ Lic #: _____

OWNER'S AFFIDAVIT: I certify that all the foregoing information is accurate and that all work will be done in compliance with all applicable laws regulating construction and zoning. WARNING TO OWNER: YOUR FAILURE TO RECORD A NOTICE OF COMMENCEMENT MAY RESULT IN YOUR PAYING TWICE FOR IMPROVEMENTS TO YOUR PROPERTY. IF YOU INTEND TO OBTAIN FINANCING, CONSULT WITH YOUR LENDER OR AN ATTORNEY BEFORE RECORDING YOUR NOTICE OF COMMENCEMENT.

Signature of Owner Rick Jackman Date: _____

Signature of Contractor _____ Date: _____

STATE OF FLORIDA

COUNTY OF POLK

Sworn to and subscribed before me this _____ day of _____ 20_____, by _____ Who is personally known

to me or who has produced _____ (Type of Identification)

Signature of Notary _____ Notary Seal or Stamp

State of Florida

My Commission Expires _____

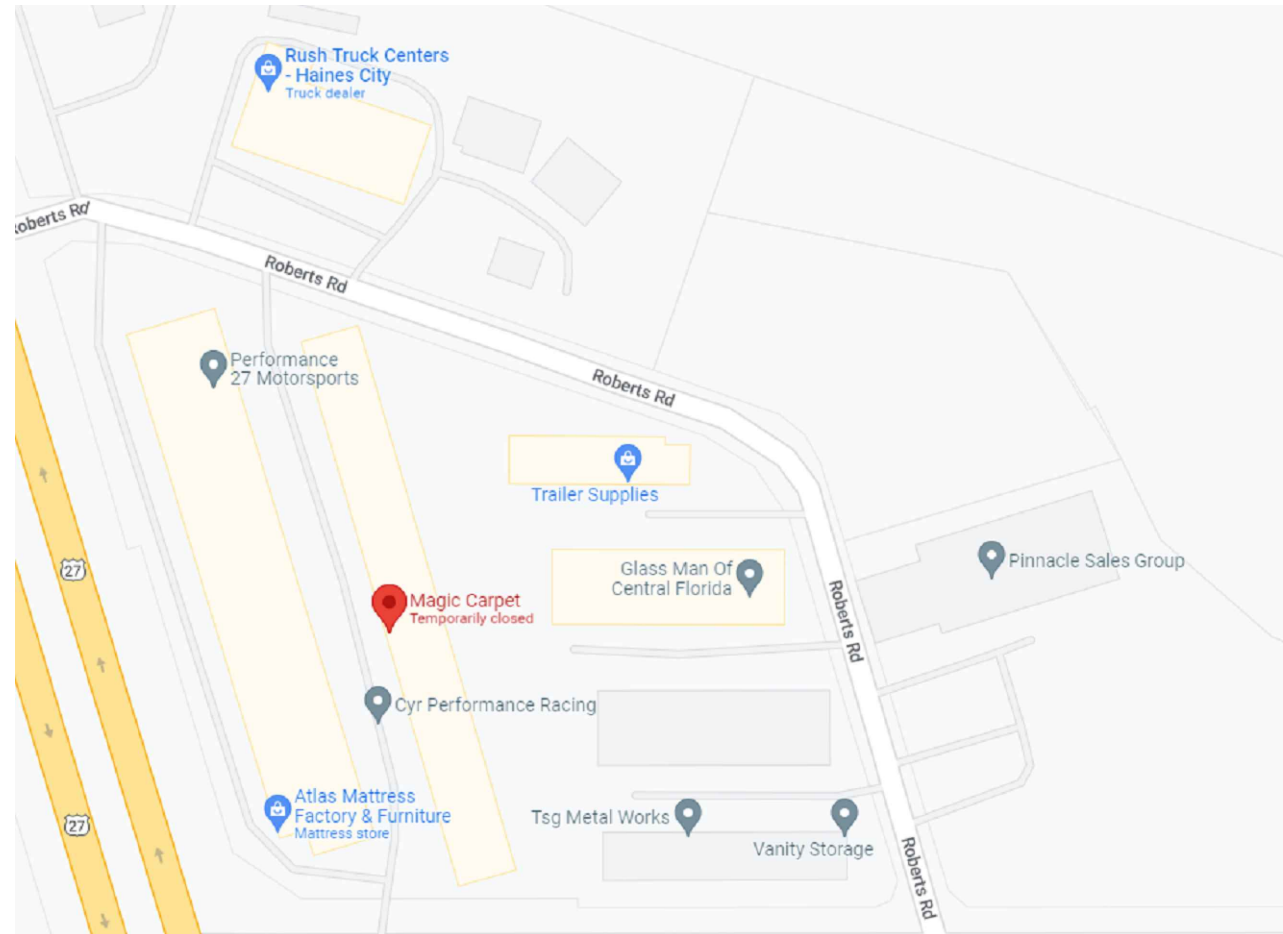
Fire Marshall: _____ Date: _____

Building Division: _____ Date: _____




















Planning/ Zoning: _____ Date: _____

PERMIT #:

JOB LOCATION MAP



UTILITY LEGEND

×	PWR WOOD POLE		ROW
	PWR CONCRETE POLE		EOP
	PWR STEEL POLE		CENTER LINE
	ST LITE		POWER
	JOINT USE TRANS		COMM
	JOINT USE		TELEVISION
	FIRE HYDRANT		WATER
	FIRE HYDRANT		SEWER
	CULVERT		RECLAIM
	STORM DRAIN		GAS



APPLICATION CITY OF LAKE HAMILTON PERMIT
TO PLACE NEW CONDUIT & CABLE WITHIN CITY RIGHT OF WAY

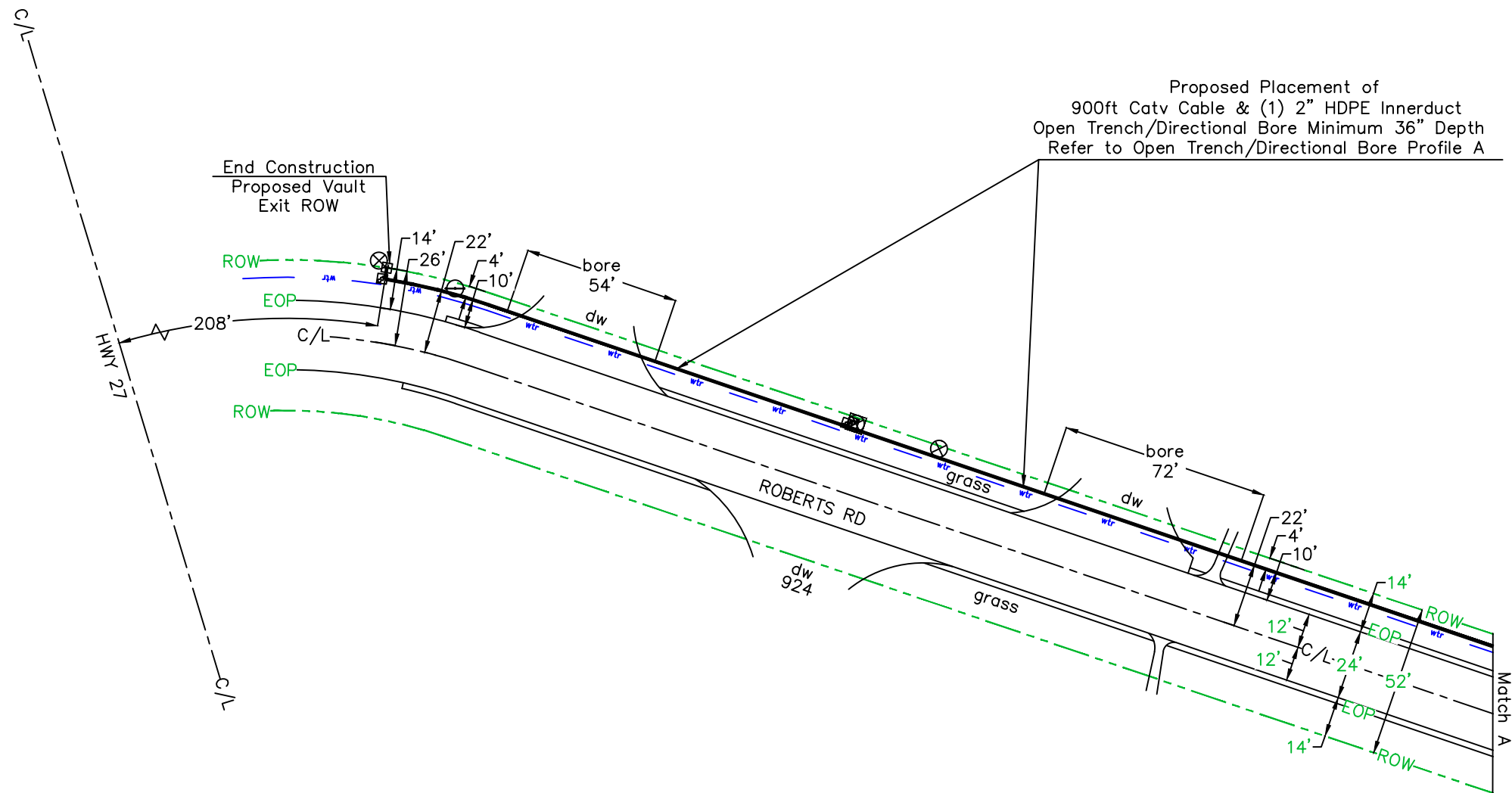
JOB DESCRIPTION :
CATV UNDERGROUND CONSTRUCTION




General Notes

1. All Catv Construction within the Public Rights of Way shall be in conformity with the Local Jurisdiction's "Minimum Standards"
2. The Contractor shall notify Call Sunshine and other utilities prior to commencement of construction.
3. Use the "Directional Bore Method" for all driveway crossings,
4. All open asphalt cuts shall be restored as per exhibit F of the F.D.O.T. utility accommodation guide.
5. All side walk removal and replacement shall be restored to the Local Jurisdiction's and F.D.O.T. Standard Specification No.522
6. All aerial construction shall maintain a minimum of 18' clearance parallel to and crossing all F.D.O.T. Rights of Way.
7. All aerial construction shall maintain a minimum of 18' clearance parallel to and 18' crossing all County and Municipalities Rights of Way.
8. Must maintain minimum 2ft seperation between existing utilities weather going over or under or paralleling.
9. Physical hand digging to be used at all times in conflict zones to minimize damages.
10. Underground utilities have been plotted from availble records and field obervations, but are not necessarily exact. Therefore utility locations will be verified 100ft in advance of trenching, plowing and boring, so that changes can be made in event of conflict.
11. Restoration shall begin within three (3) weeks after the installation of cable/ conduit. Full grass by seed and mulch or sodding as approved.
12. No open trenches to be left open overnight. Needs to be backfilled or covered. (Public Safety Hazzard.)
13. No excavation shall be permitted within 10' of protected trees (20' for Grand Oaks). All utility installation shall be placed by directional bore beegining outside of protected radius.
14. These drawings are for permitting purposes only.
15. All Construction Methods and Materials within FDOT R/ W shall comply with the Editions of the Design Standards, the Standard Specifications for Road & Bridge Construction and the Utility Accommodation Manual (UAM)
16. All FDOT R/ W disturbed by this work shall be restored to its original condition or better and in accordance to applicable FDOT specifications. All a disturbed by construction shall be re-graded and sodded, matching existing grass tupe.
17. Any damage caused by the contractor shall be repaired by the contractor/ subcontractor at his sole expense.
18. Do not place outrigger pads on sidewalk.

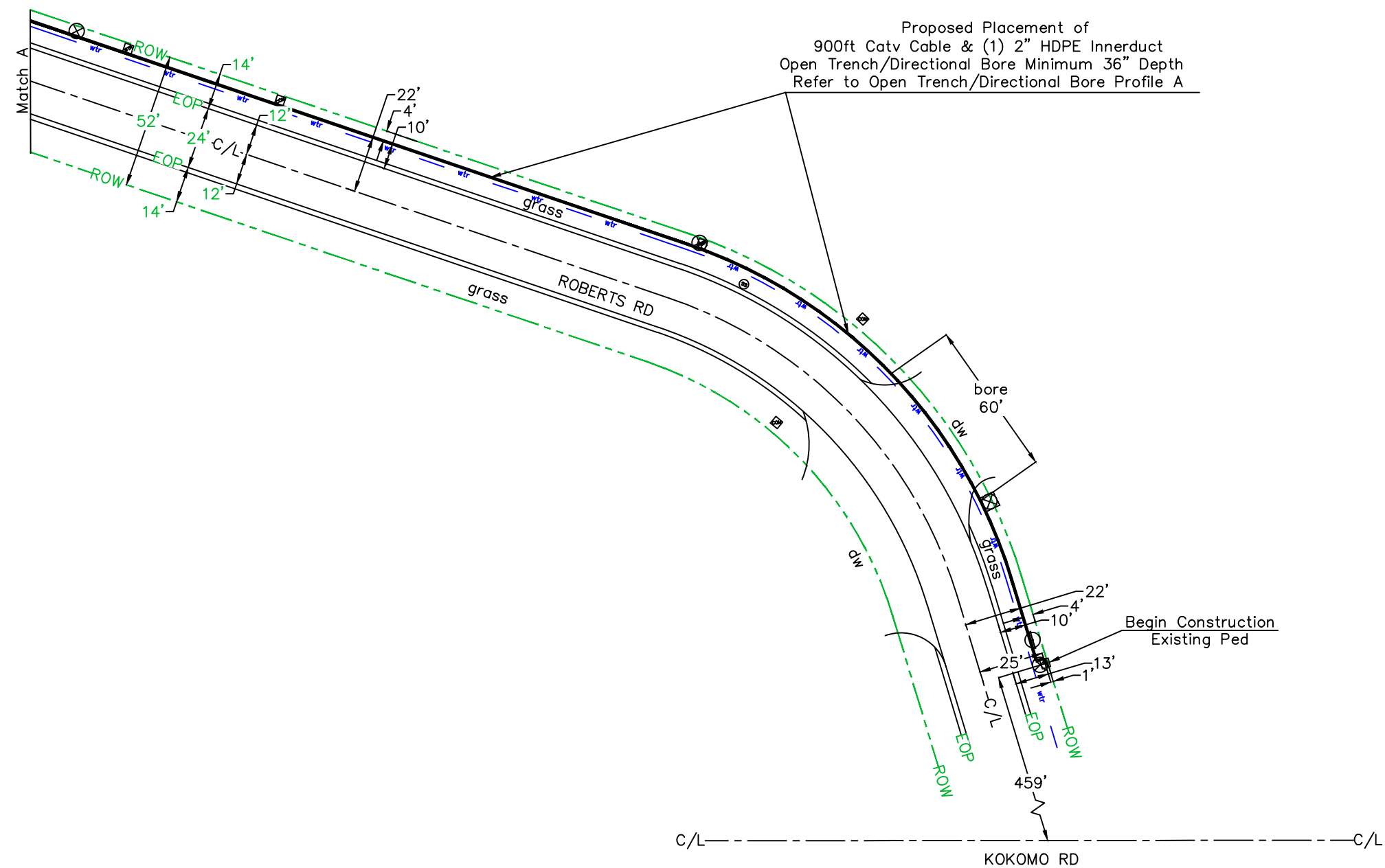
PROJECT NAME : 301 ROBERTS RD		COUNTY : POLK
DATE : 9-14-22		SECTION : 27 TOWNSHIP : 28 RANGE : 08
ENGINEER : CORY HOLLEY		DRAWN BY : RLH
PRISM ID : 3801473	WORK ORDER # : 1753573	SCALE : NONE
TYPE OF PERMIT : CITY	TRACKING #:	DRAWING SHEET : 1 OF 4




PLANVIEW OF CATV UNDERGROUND CONSTRUCTION



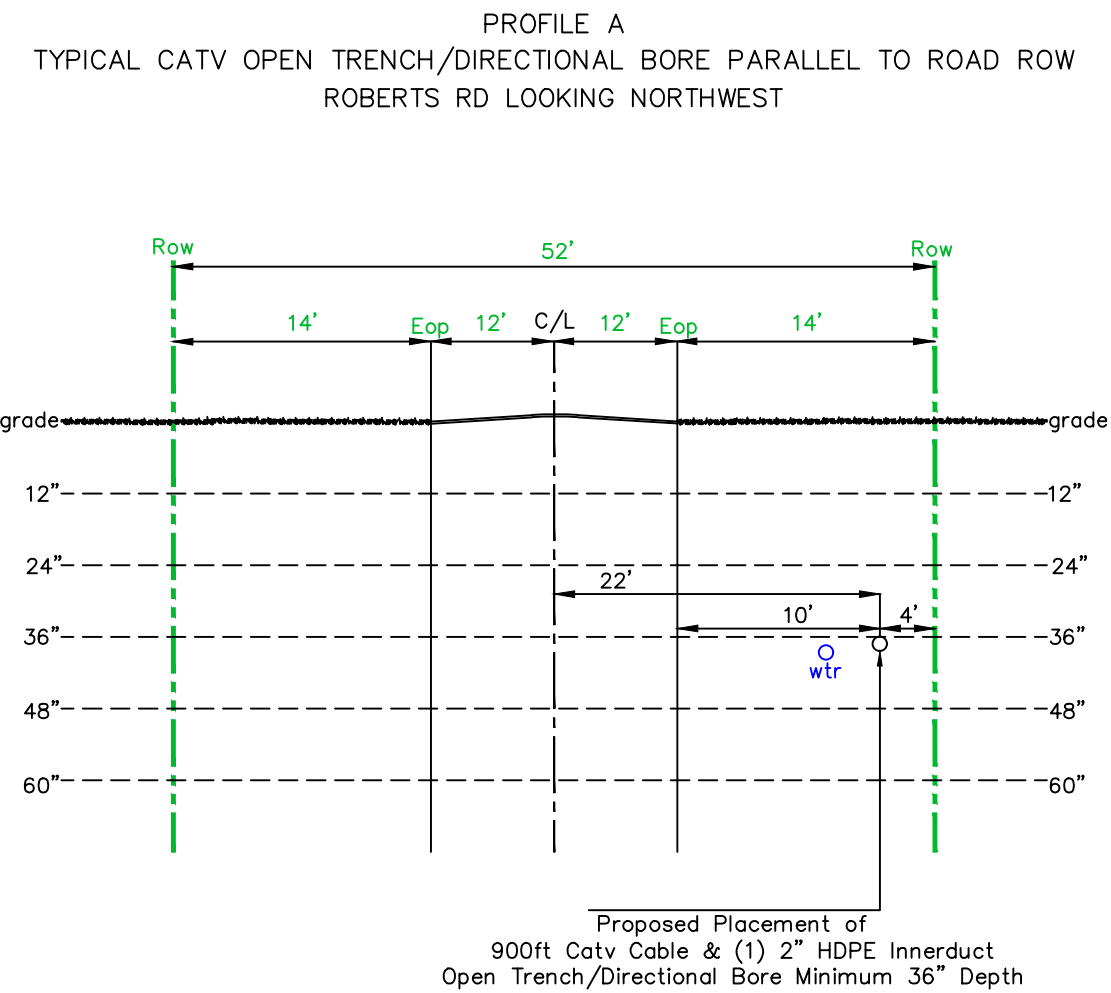
			APPLICATION CITY OF LAKE HAMILTON PERMIT TO PLACE NEW CONDUIT & CABLE WITHIN CITY RIGHT OF WAY		PROJECT NAME : 301 ROBERTS RD		COUNTY : POLK
			JOB DESCRIPTION : CATV UNDERGROUND CONSTRUCTION		DATE : 9-14-22		SECTION : 27 TOWNSHIP : 28 RANGE : 08
					ENGINEER : CORY HOLLEY		DRAWN BY : RLH
					PRISM ID : 3801473	WORK ORDER # : 1753573	SCALE : 1"=50'
					TYPE OF PERMIT : CITY	TRACKING #:	DRAWING SHEET : 2 OF 4

PLANVIEW OF CATV UNDERGROUND CONSTRUCTION

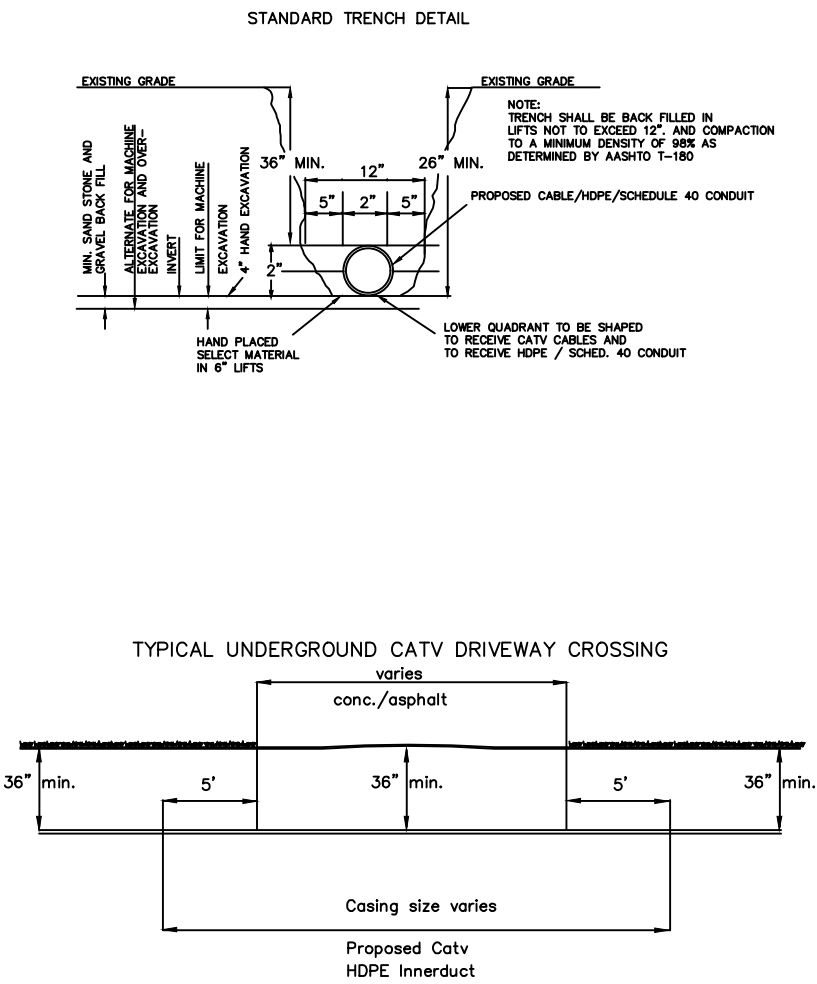





			APPLICATION CITY OF LAKE HAMILTON PERMIT TO PLACE NEW CONDUIT & CABLE WITHIN CITY RIGHT OF WAY		PROJECT NAME : 301 ROBERTS RD		COUNTY : POLK
			JOB DESCRIPTION : CATV UNDERGROUND CONSTRUCTION		DATE : 9-14-22		SECTION : 27 TOWNSHIP : 28 RANGE : 08
					ENGINEER : CORY HOLLEY		DRAWN BY : RLH
					PRISM ID : 3801473	WORK ORDER # : 1753573	SCALE : 1"=50'
					TYPE OF PERMIT : CITY	TRACKING #:	DRAWING SHEET : 3 OF 4

PROFILE VIEW OF CATV UNDERGROUND CONSTRUCTION



CONSTRUCTION TYPICALS







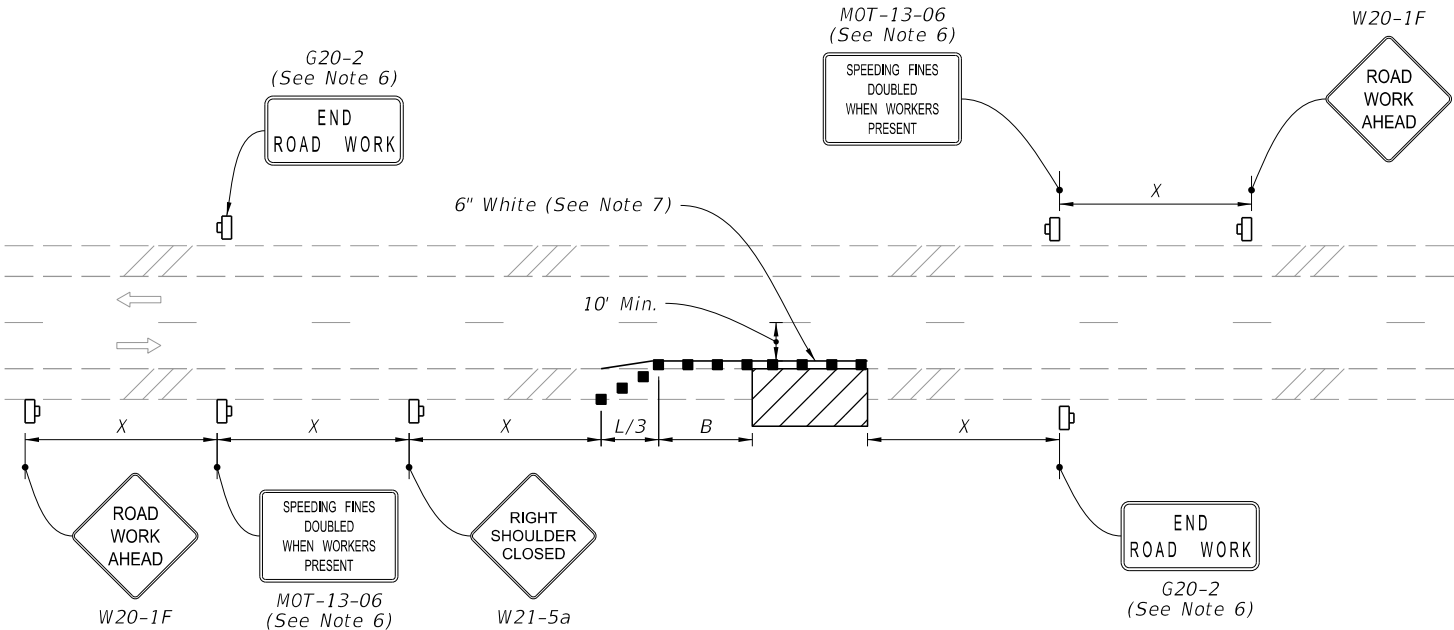
			APPLICATION CITY OF LAKE HAMILTON PERMIT TO PLACE NEW CONDUIT & CABLE WITHIN CITY RIGHT OF WAY		PROJECT NAME : 301 ROBERTS RD		COUNTY : POLK	
			JOB DESCRIPTION : CATV UNDERGROUND CONSTRUCTION		DATE : 9-14-22		SECTION : 27 TOWNSHIP : 28 RANGE : 08	
					ENGINEER : CORY HOLLEY		DRAWN BY : RLH	
					PRISM ID : 3801473	WORK ORDER # : 1753573	SCALE : NONE	

NOTE:

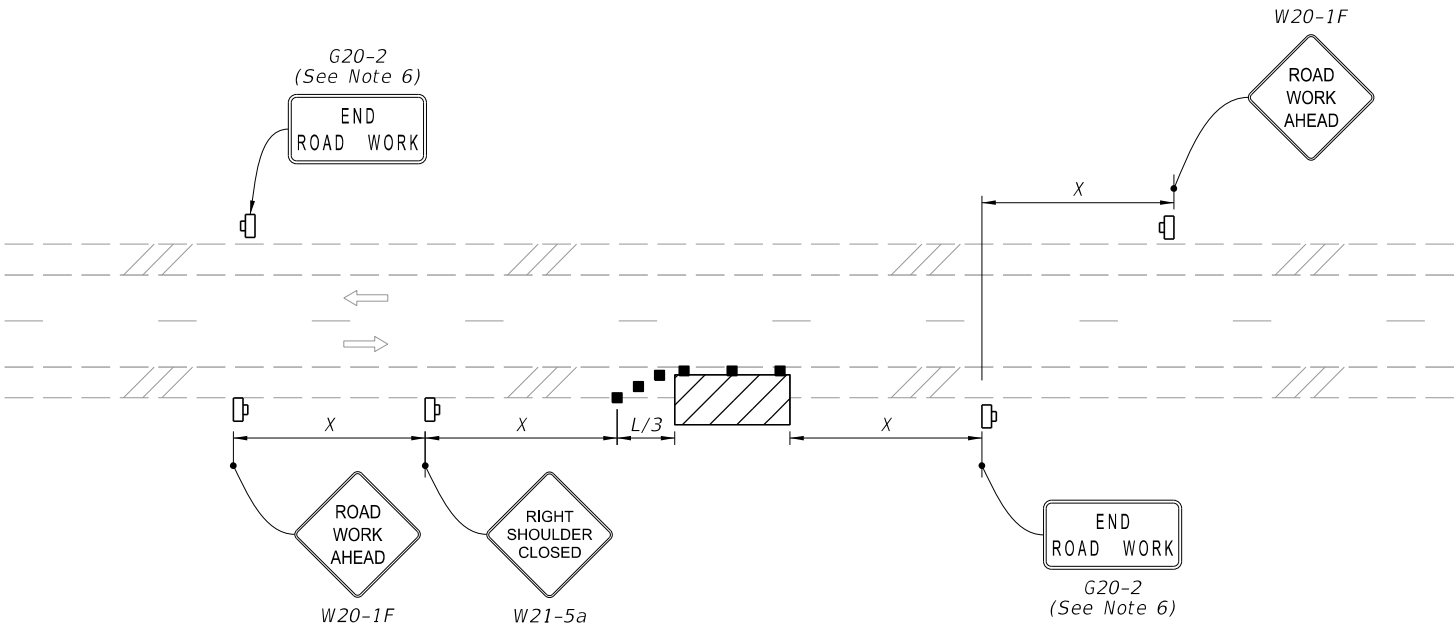
- 1. This Index applies to Two-Lane, Two-Way and Multilane Roadways, including Medians of divided roadways, with work on the shoulder.
- 2. L = Taper Length
 X = Work Zone Sign Spacing
 B = Buffer Length
See Index 102-600 for "L", "X", "B", and channelizing device spacing values.
- 3. Where work activities are between 2' and 15' from the edge of traveled way, the Engineer may omit signs and channelizing devices for work operations 60 minutes or less.
- 4. When four or more work vehicles enter the through traffic lanes in a one hour period (excluding establishing and terminating the work area), use a flagger or lane closure to accommodate work vehicle ingress and egress.
- 5. For work less than 2' from the traveled way and work zone speed is greater than 45 MPH, use a lane closure.
- 6. The "Speeding Fines Doubled When Workers Present" signs (MOT-13-06) and "End Road Work" Signs (G20-2) along with the associated work zone sign spacing distances may be omitted when the work operation is in place for 24 hours or less.
- 7. Temporary pavement markings may be omitted when the work operation is in place for 3 days or less.
- 8. Omit "Shoulder Closed" signs (W21-5a) along with associated work zone sign spacing distances for work on the median.
- 9. When there is no paved shoulder, the "Worker" sign (W21-1) may be used instead of the "Shoulder Closed" sign (W21-5a).

SYMBOLS:

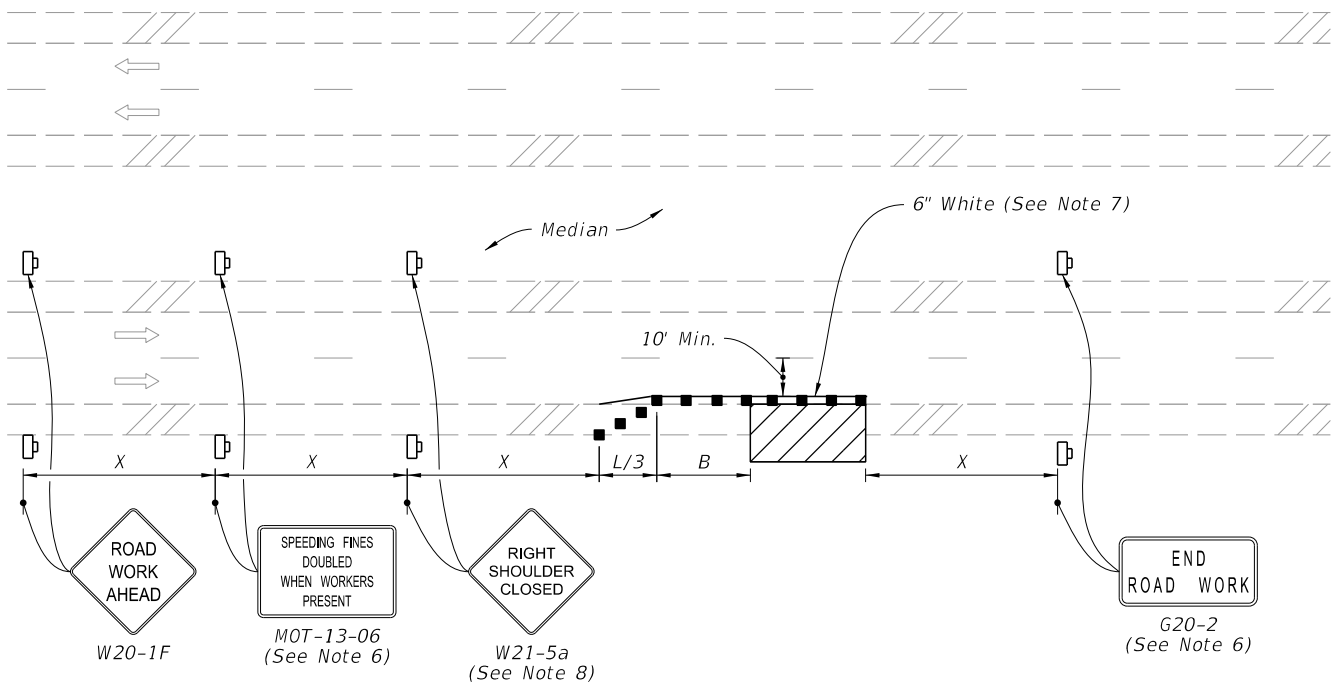
-  Work Area
-  Channelizing Device (See Index 102-600)
-  Work Zone Sign
-  Lane Identification and Direction of Traffic



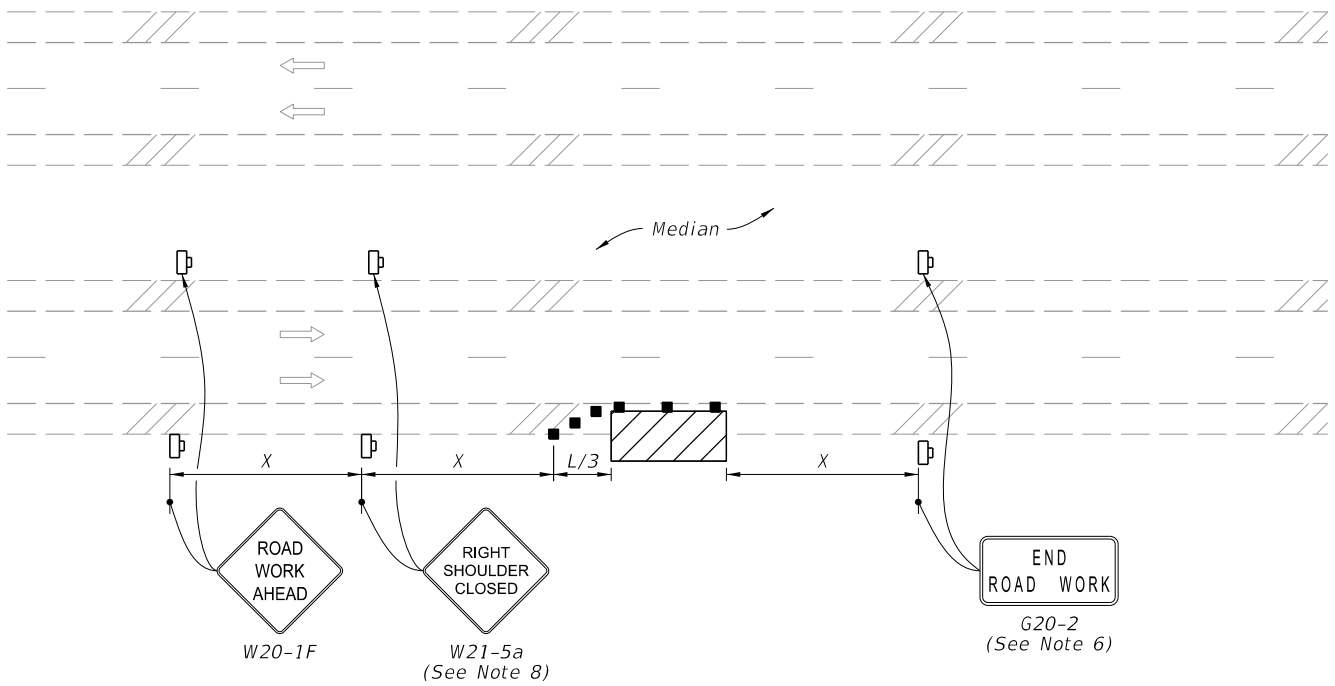
TWO-LANE ROADWAY
SHOULDER WORK LESS THAN 2' FROM THE TRAVELED WAY
WITH WORK ZONE SPEED OF 45 MPH OR LESS



TWO-LANE ROADWAY
SHOULDER WORK BETWEEN 2' AND 15' FROM THE TRAVELED WAY



MULTILANE ROADWAY
SHOULDER WORK LESS THAN 2' FROM THE TRAVELED WAY
WITH WORK ZONE SPEED OF 45 MPH OR LESS



MULTILANE ROADWAY
SHOULDER WORK BETWEEN 2' AND 15' FROM THE TRAVELED WAY

- SYMBOLS:**
- Work Area
 - Channelizing Device (See Index 102-600)
 - Work Zone Sign
 - Lane Identification and Direction of Traffic

9/23/2021 2:40:49 PM



FY 2022-23
STANDARD PLANS

TWO-LANE AND MULTILANE, WORK ON SHOULDER

INDEX
102-602

SHEET
2 of 2

LAST
REVISION
11/01/20

REVISION

DESCRIPTION:



TOWN OF LAKE HAMILTON BOARDS & COMMITTEES APPLICATION FOR APPOINTMENT

Select a Board or Committee:

Charter Review Committee ☐

Planning and Zoning Board ☐

Board of Zoning Adjustments & Appeals ☐

Parks & Rec Board ☒

Please select one: Appointment ☒

Reappointment ☐

****Please note that per Florida Statutes 112.3145, Appointment on any of these boards or committees requires a Financial Disclosure Form and must be filed annually on or before July 1st of each year.**

Name: Randi Golemm Email: randi.yar@realestateagent.com

Physical Address: 132 8th Street Lake Hamilton

Mailing Address: PO Box 205 Lake Hamilton 33851

Phone #: _____ Cell #: 863-307-7017

Employer: Self-employed - Realtor, owner card my yard under Haven

Please answer the following:

Are you a Town of Lake Hamilton resident?

☒ Yes

☐ No

☐

Are you a registered Florida voter?

☒ Yes

☐ No

☐

Do you own property in Lake Hamilton?

☒ Yes

☐ No

☐

Are you currently serving on a Town Board/Committee?

☐ Yes

☐ No

☒

Have you ever served on a Town Board/Committee?

☐ Yes

☐ No

☒

Are you a local government employee?

☐ Yes

☐ No

☒

If so - what municipality? N/A

How long have you lived in Lake Hamilton?

Years/ Months: 10 years / 1 month

If you have ever been convicted of a felony, please provide proof of restoration of rights from the clemency board. no

When completed and filed with the Town Clerk's Office, this document is a public record under Chapter 119, Florida Statutes, and therefore is open to public inspection.

Please state your reason for wanting to serve on a Town Board(s)/Committee(s):

To be more involved in my community

Describe your background and qualifications for the Board(s)/Committee(s) to which you seek appointment?.

Experience in project planning

Are there any potential conflicts, which would make it difficult for you to render objective judgment on questions which come before the Board(s)/Committee(s) to which you seek appointment?

no

REFERENCES:

Name

Address

Phone

Kamekia Floyd	Winter Haven, FL	888-585-4344
Ken Losch	Lancaster, PA	717-725-5630
Kelly Rogan	Heimds City FL	501-221-7333

Signature required if NOT submitting electronically: x

Paul S. Coleman

Date

9/12/2022

Return form to: Town Clerk's Office

Town Hall

100 Smith Avenue

Lake Hamilton Florida, 33851



Memorandum

To: Town Council

From: Town Clerk, Brittney Sandoval Soto

Date: September 23, 2022

Subject: CD Maturing

We are currently reconciling accounts for the end of year and the operating account is low on nonrestricted funds due to the large purchases approved by Council to move forward with the wastewater plant.

Due to this low amount of unrestricted cash, the finance department recommends redeeming the CD and placing it in the general fund. It will still be part of the reserve funds but will help with the rotating balance in the account.



P.O. Box 9602 • Winter Haven, FL 33883
SouthStateBank.com • 800.277.2175

032
1 of 1

Page:
Statement
Primary Ac

>000551 4388991 0001 93493 10Z
TOWN OF LAKE HAMILTON
PO BOX 126
LAKE HAMILTON, FL 33851-0126



Certificate of Deposit

Account: XXXX

Original Issue Date:	09/28/2012	Interest Rate:	1.4900 %
Original Issue Value:	\$23,701.74	Maturity Date:	09/28/2022
Last Renewal Date:	09/28/2017	Term:	60 Months
Last Renewal Value:	\$24,917.10		

Approaching Renewal

Your certificate will mature on 09/28/2022. Interest will be compounded on a monthly basis. Interest will be credited to your certificate monthly. The current balance of your public funds certificate is \$26,809.13. If the certificate renews, the new maturity date will be 09/28/2027.

You May redeem your certificate without penalty for up to 10 calendar days after maturity. During the 10 day grace period, you may make deposits (minimum \$1000) or withdrawals. After the grace period, withdrawals are subject to a penalty equal to two (2) quarters of interest; you could lose part of your principal balance. The new fixed interest rate and annual percentage yield (apy) have not yet been determined. Call us at 800-277-2175 on or after 09/28/2022 for the rate and APY that will be paid.

The APY assumes interest remains on deposit until maturity. Interest begins to accrue no later than the business day we receive credit for the deposit of noncash items and is calculated using a daily periodic rate to the principal in the account each day. Accrued interest will be paid at account closure. The account automatically renews at maturity for the same term unless you withdraw the funds at maturity or we receive written notice of your intent not to renew on or before the maturity date. The minimum balance to open and maintain a certificate is \$1000; and \$500 for an IRA. Please refer to your IRA custodial agreement for transaction limitations.



Member FDIC
NMLS# 403455



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**Service Agreement -
Town of Lake Hamilton and
Lakeland Area Mass Transit District**

This Service Agreement (hereinafter the “Agreement”) is entered into as of the 1st day of October, 2022 (hereinafter the “Effective Date”), by and between the Town of Lake Hamilton, a municipal corporation organized and existing under the laws of the State of Florida (hereinafter referred to as “Lake Hamilton”), and the Lakeland Area Mass Transit District, an independent special district (hereinafter referred to as the “District”).

WHEREAS, Lake Hamilton is a Florida municipal corporation vested with home rule authority pursuant to the Municipal Home Rule Powers Act, Chapter 166 of the Florida Statutes, and Article VIII, §2 of the Florida Constitution; and

WHEREAS, Lake Hamilton is vested with governmental, corporate and proprietary powers to enable it to conduct and perform municipal functions and render municipal services, including the general exercise of any power for municipal purposes; and

WHEREAS, provision of adequate and effective public transit services is a continuing need in Polk County; and

WHEREAS, the District is the legal entity responsible for the operation and management of the public transportation system; and

WHEREAS, the parties acknowledge, represent and agree that Lake Hamilton and District are not partners or joint venturers; and

WHEREAS, Lake Hamilton has agreed to participate in funding a portion of the fixed route services currently being operated through the municipal boundaries of Lake Hamilton; and

WHEREAS, Lake Hamilton and District represent and agree that good and valuable consideration has been received by the parties for entering into this Agreement, and Lake Hamilton and District acknowledge the sufficiency of the consideration received; and

WHEREAS, the Town Commission of the Town of Lake Hamilton finds this Agreement between Lake Hamilton and District to be in the best interests of the public

health, safety, and general welfare of the citizens and residents of the Town of Lake Hamilton.

NOW, THEREFORE, in consideration of the mutual covenants contained herein, the parties hereto agree as follows:

1. The foregoing recitals are incorporated herein by the parties as true and correct statements which form a factual and material basis for entry into this Agreement between Lake Hamilton and District.

2. The term of this Agreement shall be for a period of two (2) years commencing on October 1, 2022, through and including September 30, 2024.

3. In the event funds from governmental sources relied upon to finance this Agreement become unavailable, the District or Lake Hamilton may terminate this Agreement with no less than thirty (30) calendar days written notice to the other party. Notice shall be delivered as set forth in paragraph ten (10) of this Agreement. Either party may terminate this Agreement based on the other party's breach, by giving the breaching party written notice of the breach in accordance with paragraph ten (10) of this Agreement. If the breach is not cured within thirty (30) calendar days, the non-breaching party may terminate this Agreement immediately. Waiver by either party of breach of any provision of this Agreement shall not be deemed to be a waiver of any other breach, shall not be construed to be a modification of the terms of this Agreement, and shall not act as a waiver or estoppel to enforcement of any provision of this Agreement.

4. No later than six (6) months before the end of the term of this Agreement, the District and Lake Hamilton shall meet in good faith to discuss each party's intentions to negotiate an agreement for the continuation of the service.

5. Hours of operation of bus service are defined as the number of hours each bus operates plus reasonable travel time each way to and from the District Operations Center located at 1212 George Jenkins Boulevard, Lakeland, Florida, or the County Operations Center located in Bartow or Winter Haven, Florida. Bus service will not be provided on holidays on which the District does not operate and on any other days on which the District does not operate.

6. The fee to be charged by the District for the transit service for the first year of the Agreement will be \$10,000.00. The fee to be charged by the District for the transit service for the second year of the Agreement will be \$20,358.90. Lake Hamilton shall

remit payment within thirty (30) business days from receipt of invoice.

7. Revenue derived from the operation of the transit system, including, but not limited to the proceeds from advertising and transit fares paid by passengers, will be the absolute property of the District; and the treatment of such revenue, including the banking and accounting thereof, will be as directed by the District.

8. This Agreement is subject to the terms and conditions contained in any interlocal or other agreement between the District and any other governmental authority, including, without limitation, the City of Lakeland, the Polk Transit Authority, and the County of Polk; provided, however, that by entering into this Agreement, Lake Hamilton is not agreeing to be bound by or in any manner obligated by any of the District's rights, duties and obligations under such interlocal or other agreements referred to herein to which the District may be a party. Nothing in such agreements prohibits or limits the ability of any of the parties to this agreement to deliver the various benefits specifically described herein.

9. This Agreement is subject to all federal, state, and local laws, rules, and regulations with which the District is obligated to comply. Nothing in such laws, rules or regulations prohibits or limits the ability of any of the parties to this agreement to deliver the various benefits specifically described herein.

10. All notices, requests, demands and other communications which are required or may be given under this Agreement shall be in writing and shall be deemed to have been duly given when received if personally delivered; when transmitted if transmitted by telecopy, electronic telephone line facsimile transmission or other similar electronic or digital transmission method; the day after it is sent, if sent by recognized expedited delivery service; and five (5) days after it is sent, if mailed, first class mail, postage prepaid. In each case, notice shall be sent to:

LAKE HAMILTON: Town of Lake Hamilton
 ATTN: Town Manager
 P.O. Box 126
 Lake Hamilton, FL 33851

DISTRICT: Lakeland Area Mass Transit District

ATTN: Executive Director
1212 George Jenkins Boulevard
Lakeland, FL 33815

11. If any covenant or provision of this Agreement is determined to be invalid, illegal or incapable of being enforced, all other covenants and provisions of this Agreement shall, nevertheless, remain in full force and effect, and no covenant or provision shall be dependent upon any other covenant or provision unless so expressed herein.

12. This Agreement contains all the terms and conditions agreed upon by the parties and is a complete and exclusive statement of the Agreement between the parties regarding the subject matter of this Agreement. Any renewals, alterations, variations, modifications, amendments or waivers of provisions of this Agreement shall only be valid when they have been reduced to writing, and duly signed and approved by all entities to this Agreement, including but not limited to the governing bodies of both the District and Lake Hamilton. This Agreement supersedes all other agreements and proposals, oral or written, regarding the subject matter herein, and all such other agreements and proposals are hereby deemed void.

13. In the performance of this Agreement, the District will be acting in the capacity of an independent contractor, and not as an agent, employee, partner, joint venturer, or associate of Lake Hamilton. The District shall be solely responsible for the means, methods, techniques, sequences, and procedures utilized by the District in the full performance of this Agreement. Neither the District nor any of its employees, officers, agents or any other individual directed to act on behalf of the District for any act related to this Agreement, shall represent, act, purport to act, or be deemed to be the agent, representative, employee or servant of Lake Hamilton.

14. This Agreement shall be construed in accordance with the laws of the State of Florida and venue of any legal proceedings shall be in Polk County, Florida, if the action is commenced in state court. If any action is commenced in federal court, then venue shall be in the United States District Court for the Middle District of Florida, Tampa Division. If any legal action or other proceeding is brought for the enforcement of this Agreement, or because of an alleged dispute, breach, default or misrepresentation in connection with any provisions of this Agreement, the successful or prevailing party shall

be entitled to recover reasonable attorney's fees, court costs and all reasonable expenses even if not taxable as court costs (including, without limitation, all such reasonable fees, costs and expenses incident to bankruptcy and appeals), incurred in that action or proceedings, in addition to any other relief to which such party may be entitled.

15. Nothing contained herein shall operate or be construed as a waiver of the District's or Lake Hamilton's limits of liability as set forth in Section 768.28 of the Florida Statutes regardless of whether such claims are based in tort, contract, statute, strict liability, negligence, product liability or otherwise. No waiver of sovereign immunity is deemed to be made by either the District or Lake Hamilton by entering into this Agreement nor shall any terms of this Agreement confer upon any third person, corporation, or entity other than the parties hereto any right or cause of action for damages claimed against any party to this Agreement.

16. This Agreement shall be subject to Chapter 119 of the Florida Statutes, Florida's Public Records Law.

17. Each party signing this Agreement represents and warrants that he/she/it has read, understands and acknowledges any and all of the terms, covenants, conditions and requirements set forth herein. The parties represent and warrant to one another that all the necessary action(s) to execute this Agreement have occurred and that the parties possess the legal authority to enter into this Agreement and undertake all the obligations imposed herein.

18. The calculation of the number of days that have passed during any time period prescribed shall be based on calendar days (unless specified otherwise in this Agreement). Unless otherwise specified in this Agreement, the calculation of the number of days that have passed during any time period prescribed in or by this Agreement shall commence on the day immediately following the event triggering such time period. If the tolling of such time period is not contingent on an action or event, the calculation of the number of days that have passed during such time period prescribed in or by this Agreement shall commence on the day immediately following the Effective Date. For purposes of this Agreement, unless otherwise specified herein, the tolling of any such time period(s) shall be in calendar days. In the event any time period or deadline identified in this Agreement expires or falls on a Saturday, Sunday or recognized holiday, said expiration or deadline shall be automatically tolled until 5:00 p.m. on the next

available business day on which the District and Lake Hamilton are open for business to the public.

19. The parties acknowledge and agree that it is in their best interests and the best interests of the public that this Agreement be performed in strict accordance with the terms, covenants and conditions contained herein; and the parties shall, in all instances, cooperate and act in good faith in complying with all of the terms, covenants and conditions contained herein.

LIMITATION OF LIABILITY

IN NO EVENT, SHALL THE DISTRICT BE LIABLE TO LAKE HAMILTON FOR INDIRECT, INCIDENTAL, CONSEQUENTIAL, SPECIAL, EXEMPLARY, OR PUNITIVE DAMAGES OF ANY KIND OR NATURE, INCLUDING LOSS OF PROFIT, WHETHER FORESEEABLE OR NOT, ARISING OUT OF OR RESULTING FROM THE NONPERFORMANCE OR BREACH OF THIS AGREEMENT BY THE DISTRICT WHETHER BASED IN CONTRACT, COMMON LAW, WARRANTY, TORT, STRICT LIABILITY, CONTRIBUTION, INDEMNITY OR OTHERWISE.

IN NO EVENT, SHALL LAKE HAMILTON BE LIABLE TO DISTRICT FOR INDIRECT, INCIDENTAL, CONSEQUENTIAL, SPECIAL, EXEMPLARY, OR PUNITIVE DAMAGES OF ANY KIND OR NATURE, INCLUDING LOSS OF PROFIT, WHETHER FORESEEABLE OR NOT, ARISING OUT OF OR RESULTING FROM THE NONPERFORMANCE OR BREACH OF THIS AGREEMENT BY LAKE HAMILTON WHETHER BASED IN CONTRACT, COMMON LAW, WARRANTY, TORT, STRICT LIABILITY, CONTRIBUTION, INDEMNITY OR OTHERWISE.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed for the uses and purposes therein expressed as of the day and year set forth above.

TOWN OF LAKE HAMILTON

ATTEST: _____
Town Clerk

BY: _____

[SIGNATURES CONTINUED ON FOLLOWING PAGE]

LAKELAND AREA MASS
TRANSIT DISTRICT

ATTEST: _____
Administrative Assistant

BY: _____
Chair



Restrictions on Use

While recipients have considerable flexibility to use Coronavirus State and Local Fiscal Recovery Funds to address the diverse needs of their communities, some restrictions on use of funds apply.

OFFSET A REDUCTION IN NET TAX REVENUE

- **States and territories may not use this funding to directly or indirectly offset a reduction in net tax revenue resulting from a change in law, regulation, or administrative interpretation beginning on March 3, 2021, through the last day of the fiscal year in which the funds provided have been spent.** If a state or territory cuts taxes during this period, it must demonstrate how it paid for the tax cuts from sources other than SLFRF, such as by enacting policies to raise other sources of revenue, by cutting spending, or through higher revenue due to economic growth. If the funds provided have been used to offset tax cuts, the amount used for this purpose must be repaid to the Treasury.

DEPOSITS INTO PENSION FUNDS

- **No recipients except Tribal governments may use this funding to make a deposit to a pension fund.** Treasury defines a “deposit” as an extraordinary contribution to a pension fund for the purpose of reducing an accrued, unfunded liability. While pension deposits are prohibited, recipients may use funds for routine payroll contributions connected to an eligible use of funds (e.g., for public health and safety staff). Examples of extraordinary payments include ones that:
 - ✖ Reduce a liability incurred prior to the start of the COVID-19 public health emergency and occur outside the recipient's regular timing for making the payment
 - ✖ Occur at the regular time for pension contributions but is larger than a regular payment would have been

ADDITIONAL RESTRICTIONS AND REQUIREMENTS

Additional restrictions and requirements that apply across all eligible use categories include:

- **No debt service or replenishing financial reserves.** Since SLFRF funds are intended to be used prospectively, recipients may not use SLFRF funds for debt service or replenishing financial reserves (e.g., rainy day funds).
- **No satisfaction of settlements and judgments.** Satisfaction of any obligation arising under or pursuant to a settlement agreement, judgment, consent decree, or judicially confirmed debt restructuring in a judicial, administrative, or regulatory proceeding is itself not an eligible use. However, if a settlement requires the recipient to provide services or incur other costs that are an eligible use of SLFRF funds, SLFRF may be used for those costs.
- **Additional general restrictions.** SLFRF funds may not be used for a project that conflicts with or contravenes the purpose of the American Rescue Plan Act statute (e.g., uses of funds that

Coronavirus State & Local Fiscal Recovery Funds: Overview of the Final Rule



U.S. DEPARTMENT OF THE TREASURY

undermine COVID-19 mitigation practices in line with CDC guidance and recommendations) and may not be used in violation of the Award Terms and Conditions or conflict of interest requirements under the Uniform Guidance. Other applicable laws and regulations, outside of SLFRF program requirements, may also apply (e.g., laws around procurement, contracting, conflicts-of-interest, environmental standards, or civil rights).



PERSONNEL POLICIES

&

PROCEDURES

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DEFINITIONS

For purposes of these policies, the following definitions will apply:

Anniversary Date

Anniversary Date shall be the Date of Hire and/or Date of Promotion

Appointment

The employment of an applicant to hold a position with the Town.

Authorized Hours:

The number of hours an employee was hired to work. Actual hours worked during any given pay period may be different than authorized hours, depending on workload demands or other factors, and upon approval of the employee's supervisor.

Benefits

Privileges granted to qualified employees in the form of paid leave and/or insurance coverage

Benefit Earning Employees

Employees who are eligible for at least a pro-rated portion of Town provided benefits. Such employees must be year-round employees who work at least 30 hours per week on a regular basis.

Compensatory Time

The hours absent from duty granted to compensate for authorized overtime worked rather than receiving payment for overtime worked.

Core Hours

The core hours that all employees (exempt and non-exempt) are expected to work are 8:00 a.m. to 4:00 p.m., Monday through Friday. Police and public works employees do not have core hours and work the schedules established by the Town Administrator or their supervisors.

Council (Town)

The governing legislative body.

Demotion

The movement of an employee from one job class to another within the Town, where the maximum salary for the new position is lower than that of the employee's former position.

Dismissal

The separation from Town employment of an employee for cause.

Effective Date

The date when a personnel action takes effect.

Eligible

One who has met the requirements for a given position with the Town and whose name has been placed on an eligible list for hire and are entitled to certain benefits.

Employee

An individual who has successfully completed all stages of the selection process including the probation period.

Employee classification Plan

A tool used to ensure equitable and uniform administration and accountability of pay based on employee performance and work records.

Exempt Employee

Employees who are not covered by the overtime provisions of the federal or state Fair Labor Standards Act.

Updated 09/2022

FICA (Federal Insurance Contributions Act)

FICA is the federal requirement that a certain amount be automatically withheld from employees' earnings. Specifically, FICA requires an employee contribution of 6.2% for Social Security and 1.45% for Medicare. The Town contributes a matching 7.65% on behalf of each employee. Certain employees are exempt or partially exempt from these withholdings.

Fiscal Year

The period from October 1 to September 31.

Full-time Employee

Employees who are required to work forty (40) or more hours per week year-round in an ongoing position

Hours of Operation

The Town's regular hours of operation are Monday through Friday, from 8:00 a.m. to 4:00 p.m. **5:00PM**

Management

Is who supervising others and/or is the department head

Mayor

Shall mean the elected Mayor of the town, or when appropriate to intent, "such other person as the Mayor or Council shall designate in writing".

Non-exempt Employee

Employees who are covered by the federal or state Fair Labor Standards Act. Such employees are normally eligible for overtime at 1.5 times their regular hourly wage for all hours worked over forty (40) in any given workweek.

Part-time Employee

Employees who are required to work less than forty (40) hours per week year-round in an ongoing position.

Pay Period

A seven (7) day period beginning at 12:00 a.m. (midnight) on ~~Thursday~~ **Monday** through 11:59 p.m. on ~~Wednesday~~, **Sunday** ~~seven (7)~~ **(14)** days later.

Probation Period

A 90-day period at the start of employment with the Town (or at the beginning of a promotion, reassignment or transfer) that is designated as a period within which to learn the job. The probation period is the last part of the selection process.

Promotion

Movement of an employee from one job class to another within the Town, where the maximum salary for the new position is higher than that of the employee's former position.

Public Official

An officer or employee of the Town in who is vested the authority by law, rule, or regulation or to whom the authority has been delegated, to appoint, employ, promote, or advance individuals for appointment, employment, promotion or advancement in connection with employment in the Town.

Relative

With respect to public official, means an individual who is related as to father, mother, son, daughter, brother, sister, uncle, aunt, first cousin, nephew, niece, spouse, in-laws, step relatives, half brothers and sisters and grandparents or children.

Temporary Employee

Employees who work in temporary positions. Temporary jobs might have a defined start and end date or may be for the duration of a specific project. Temporary employees may be assigned to work a full-time or part-time schedule. Temporary employees do not earn benefits or credit for seniority.

Transfer

Movement of an employee from one Town position to another of equivalent pay.

Workweek

A workweek is ~~seven~~ **fourteen** consecutive 24-hour periods. For most employees the workweek will run from ~~Sunday~~ **Monday** through the following ~~Saturday~~ **Sunday**. With the approval of the Town Administrator, departments may establish a different workweek based on coverage and service delivery needs.

CHAPTER 1

ORGANIZATION AND ADMINISTRATION

1-1 Authority

The Town of Lake Hamilton under authority granted by the Town Council of Lake Hamilton, Florida has established these personnel policies and procedures. All policies herein will be consistent with and conform to overall policy as prescribed by the Town Council. These personnel policies shall supersede all related policies, rules, memorandum, or ordinances enacted prior to adoption of these rules. Any new or different benefits, rules, or policies provided herein shall not be retroactive prior to the date of their adoption. Any employment agreements or contracts will work in concert with these policies and may include extra benefits if approved by the Town Council.

1-2 Adoption of Personnel Policies

The following is the Personnel Policy for the Town of Lake Hamilton, Florida, adopted July 7, 2015. This replaces and supersedes prior personnel policies and procedures. It is subject to subsequent amendments as necessary. The Town reserves the power, at its sole discretion and without prior notice, to interpret, revise, or rescind any policy or procedure stated herein.

These rules and regulations were established under authority of Town Council of Lake Hamilton, Florida. The policies and procedures outlined herein shall apply to all personnel employed by Lake Hamilton except:

- Elected Officials.
- Town Attorney.
- Members of Town Boards, Commissions and Committees.
- Consultants and Contractors;
- Volunteers, except as specifically noted for reserve police officers.

1-3 General Policy

It is the fundamental policy of the Town of Lake Hamilton that a fair and uniform personnel management system be established for its employees in order to insure the most effective provision of services to the citizens of the Community. Therefore, it shall be the policy of the Town that:

- a. Employment shall be based on merit, suitability, and ability without regard to race, religion, creed, color, national origin, age, sex, marital status, or the presence of any sensory, mental, or physical disability.
- b. Equitable incentives and conditions of employment shall be established and maintained.
- c. Compensation shall be in accordance with duties assigned and performance shall be the major factor in justifying salary adjustments and increases.
- d. Employees shall be expected to work productively and to demonstrate a considerate and friendly attitude towards persons with whom they come in contact during the course of their work.
- e. Employees shall adhere to the policies and procedures required of them and shall endeavor to serve the citizen and taxpayer to the best of their ability.

The Town retains the sole right to exercise all managerial functions including, but not limited to, these rights:

- To direct the work force.
- To assign, reassign, supervise, discipline, and dismiss employees.
- To transfer or reassign duties as necessary to provide services to the citizen.
- To establish, change, alter, or delete policies as may be deemed necessary to achieve its goals.

1-4 Purpose and Scope of Manual

This manual is intended to serve as a source of information about your employment with Lake Hamilton. It answers many of the questions most frequently asked by Town employees. If further information or advice about matters covered in this manual is needed, please contact your supervisor.

The policies and procedures contained in this manual are internal guidelines, which do not create contractual rights and should not be interpreted to constitute binding contractual obligations. The Town reserves the right, in its sole judgment, to modify, amend, or rescind the provisions of this manual.

Much of the information contained in this policy is drawn from relevant laws, regulations, and policies. Should there be a conflict between any statement, fact or figure presented here, and the current laws, regulations and policies, the latter takes precedence. This policy is not intended to alter the employment-at-will relationship in any way.

It is the responsibility of each employee to understand and abide by these personnel policies as a condition of continuing employment. Nothing in these policies is intended to modify or supersede any applicable provision of state or federal law.

Departments may have special work rules deemed necessary by the supervisor and approved by the Town Administrator for the achievement of objectives of that department. Each employee will be given a copy of such work rules by the department upon hiring or when amended, such rules will be further explained, and enforcement discussed with the employee by the immediate supervisor. In the event of a conflict in any section and the department rules, the town's personnel policies shall prevail.

1-5 Town Administration

The Town Charter of Lake Hamilton establishes the powers of the Lake Hamilton government. These powers are vested in a Town Council consisting of five (5) members, The Mayor and four (4) Council Members. The qualified voters of the Town of Lake Hamilton, elect members of the Town Council for a term of three years. These terms are staggered.

The Town Administrator is a full-time official appointed by the Town Council. The Town Charter specify the duties of this position, which include, acting as the administrative head of the government, preparing the town's annual budget, and executing resolutions and orders of the Council. The Town Administrator shall administer these policies. It is the responsibility of the Administrator to supervise all Town employees.

The Town Charter delegates to the Town Administrator authority in selection, hiring, and dismissal of all other Town employees with the exception of the Town Attorney. The actual selection and appointment responsibility is assigned to the Town Administrator who shall retain the ultimate authority for all personnel under its auspices.

Except as otherwise prohibited by law, the Town of Lake Hamilton has the right to terminate any employee at any time for any or no reason. Employees may similarly terminate employment at any time for any reason.

CHAPTER 2

EMPLOYMENT

2-1 Equal Employment Opportunity

Lake Hamilton shall promote and afford equal treatment and service to all citizens and will assure that all applicants are given equal employment opportunity without regard to race, religion, creed, color, national origin, age, sex, marital status, military or veteran status, or the presence of any sensory, mental, or physical disability. Lake Hamilton shall operate within the principles of equal employment opportunity guidelines set forth in Federal, State, and local Laws and regulations.

All activities relating to employment including recruitment, testing, selection, promotion, training, and termination shall be conducted in a nondiscriminatory manner.

Lake Hamilton will cooperate fully with all organizations and Commissions organized to promote fair practices and equal employment opportunity.

The Town's commitment to equal employment opportunities includes providing reasonable accommodation where applicable. If you require a reasonable accommodation to fulfill the essential functions of your position, please notify your supervisor.

2-2 Open Door Policy

Lake Hamilton practices an open-door policy in which any employee who wishes to meet with the Town Administrator can do so by setting an appointment through his/her respective department head or through the Town Administration support staff.

2-3 Application Process

The Town Administrators Office will administer and coordinate the hiring process for all position vacancies. All hiring efforts are conducted in the spirit of equal opportunity. All departments announcing position vacancies will adhere to the following procedures.

2-4 Recruitment

1. The Town Administrator's Office will be notified immediately by the respective department head of any position vacancies.
2. The affected department may be asked to assist the Town Administrator's Office, as necessary, in formulating the job announcement and advertisements.
3. The Town Administrator's Office will post job openings on the Town's website and with the Florida League of Cities. Newspaper advertisements may run concurrently with the internal posting. When qualified applicants are available internally, the Town will consider filling job openings by promoting from within and may decide to post internally rather than recruiting individuals not currently employed with the Town.
4. Advertisements for local newspapers, trade publications, professional journals and professional organizational websites may be developed and placed by the Town Administrator's Office with assistance provided by the affected department.
5. Applications shall be submitted to the Town Administrator's Office using the Town Employment Application. A resume will not substitute for the Town application form. The Town will accept applications for employment only for specific positions in which openings exist. In-house candidates interested in applying for another position within the Town should follow these same procedures.
6. No applications for a position will be accepted after close of business on the published closing date. Applicants may request applications through the Town Administrators Office or access them on the Town's website. If time is a factor, a resume will hold as an application slot open for two (2) working days after the closing date. If there are not sufficient qualified candidates at the closing date, the position can be re-opened and re-advertised.

7. Copies of all applications may be submitted to the affected department for review and comment.
8. Applicants may be disqualified from consideration for employment when any of the following facts exist:
 - a. They do not possess the qualifications for the job.
 - b. They have demonstrated an unsatisfactory employment record or personal record as evidenced by information contained on the application form or by the results of a reference check or background check.
 - c. They have made false statements of any material facts or were deceptive in their application.
 - d. They are physically, mentally, or otherwise unable to perform the essential job functions of the position with reasonable accommodation.
 - e. The applicant does not meet the legal minimum age limits prescribed by law.
9. Lake Hamilton endeavors to employ the best-suited person for each position. Each candidate for employment must complete the application process as set forth in Section 2-3. Applicants may be subject to various pre-employment checks and tests to determine suitability for the position. Applicants must sign a release for a background check as part of the application process. All applicants are required to meet the minimum standards of requirements for the position as set forth in the job description.

2-5 Interview Process

The employment interview is a supplement to and part of the selection process. The primary function of the interview is to obtain data on certain knowledge, skills, and abilities of a candidate not available through review of applications or other testing mechanisms. Certain guidelines will be observed to maximize the validity and reliability of the interview process as well as ensure the adherence to current EEOC requirements.

1. The Administrator's Office may coordinate the interview process, including scheduling candidates and the development of interview questions, etc.
2. The Administrator's Office and the Department Head of the department in which the position vacancy exists shall be responsible for the development of interview questions and standards for measurement of candidate responses. Consistency will be maintained in questions asked of all candidates. The questions must be job related. All interview questions shall focus on the applicant's ability to perform essential job functions.
3. Inquiries as to an applicant's ability to read, write or speak foreign languages are permitted when such inquiries are based on job requirements.
4. The candidates should be provided a job description outlining the responsibilities and requirements of the position to be staffed.

2-6 Applicant Expenses

1. Unless approved by the Town Council, the Town does not reimburse any applicant for travel costs in conjunction with the hiring process.
2. Relocation costs are paid in full by the employee unless otherwise approved by the Town Council of Lake Hamilton.

2-7 Reference Check

1. Following the initial interview, the Department Head or the Administrator's Office conducts an employment reference check on the final candidate(s). The check includes verification of employment duties, dates of employment, work record, attendance record, strengths, weaknesses, safety record, and other pertinent information. Education and/ or licensure may also be verified.
2. Results of the reference check will help determine the applicant's aptness for the position.

2-8 Background Check/ DMV Check

1. A background check will be conducted prior to applicant notification. The applicant will have to sign a Background Check Authorization Release Form as part of the application process. (See Appendix E)
2. Any background check will be obtained by the Administrator's Office and the Police Department or other designated individual/agency within the guidelines of the Fair Credit Reporting Act.
 - Present a valid driver's license of the appropriate class, where required, and demonstrate the ability to operate assigned equipment.
 - Sign a loyalty oath.
 - Complete USCI Form I-9 verifying eligibility to be employed in the United States of America.
 - Submit to any further necessary processing to ascertain fitness and identification for the job in question, including polygraph interviews and fingerprinting, as necessary.
3. If a background check is returned flagged, it will be reviewed by the Town Administrator. It will then be decided if the candidate is still eligible for the position. (See Appendix D)
4. All new employees who will operate a Town-owned motor vehicle must possess a valid Florida driver's license. In addition, employees who will be driving vehicles larger than a pickup truck must possess the appropriate commercial driver's license (CDL). All new employees' driving records may be checked through the Florida Department of Motor Vehicles. Periodic DMV checks may be performed on all current employees who are authorized to drive Town Vehicles. Anyone who has had a DUI (Driving under the influence) within the last five (5) years and/or has a high incidence of moving traffic violations may be reassigned or terminated.

2-9 Applicant Notification

1. After a final decision is reached, the Department Head or Administrator will notify the candidate of their selection and make a verbal offer.
2. If the first offer is rejected, it will be decided whether to hire another candidate or to reopen the position.

2-10 Pre-employment Physical and Drug Screen

1. If the verbal offer is accepted, the applicant will be hired with a condition of passing pre-employment physical and drug screening. The Town may require additional screenings and evaluations depending on the nature of the position. The offer of employment is contingent upon the successful completion of the medical exam.
2. All full time and part time employees will have a physical and drug screening. Temporary employees are required to have a drug screen only, unless required by the Department due to the nature of the work.
3. The cost of any required physical examination and drug screen will be paid by the Town and completed by a medical doctor / clinic chosen by the Town.
4. The employee will return the physical examination record to the Administrators Office. This will become part of the employee's confidential medical file.

2-11 Rehire/ Reinstatement

Any employee who voluntarily terminates employment with the Town in good standing shall be eligible to be considered for rehire. If an employee is rehired within six (6) months, no pre-employment tests need to be performed again. An employee who has chosen to terminate employment with the Town and is in good standing and wishes to return within thirty (30) days of the separation, may be reinstated, at the department head's discretion, to their former position if vacant.

2-12 Orientation

1. All new employees of the Town will be scheduled to meet with the Administrator's Office when starting their employment for general orientation.
2. The Administrator's Office will provide the employee with a job description, information on employee benefits, policies and other miscellaneous information, including a copy of these personnel policies and procedures. The Administrative Office will have the new employee complete the necessary Federal and State tax forms.
3. The Department Head will provide additional information to the new employee, including:
 - a. Work standards and regulations.
 - b. Hours of work, timesheets, leave requests.
 - c. Duties of the position.
 - d. Safety rules and procedures, location of safety or protective equipment.
 - e. Tour of the work area, including location of equipment, supplies, etc.
 - f. Introduction to co-workers.
 - g. Schedule for lunch and breaks.
 - h. When and whom to report absence from work.
 - i. Who is responsible for performance planning and evaluations.
4. All new employees shall be required to serve a probationary period as defined in this Chapter.

2-13 Employment Categories

All employees at the time of hiring shall be designated as either regular full-time employees, regular part-time, seasonal, or temporary employees. Employees will also be designated as salary or hourly.

Regular Full-Time Employees are selected to fill positions in the Town that normally work a minimum of 40 hours per workweek on a year-round basis and who have completed the minimum probationary period. Some regular full-time positions involve non-standard work hours to insure continuous operation. Regular full-time employees are eligible to receive full benefits, including retirement, group life, health insurance, sick leave, annual leave, military leave, paid holidays, and voluntary payroll deductions, under the terms and conditions as approved by the Council or as stated under the provisions from those benefit policies.

Regular Part-time Employees are hired when the employee's services are only needed for a part of a workday or workweek, and generally will work 30 or fewer hours per week.

Temporary Employees are selected to fill a position having a short or fixed term to accomplish a specific project or projects. This position may be either part-time or full-time and usually is for duration of less than one year. Temporary employees are not eligible for Town benefits. A temporary employee may be dismissed at any time and has no right of appeal through the grievance procedure.

Probationary Employees have not successfully completed the required period of probation following original employment. During that time, probationary employees may be eligible for the same benefits as regular full-time employees; however, sick leave and vacation time will accrue and may become available following the probationary period only if the employee becomes a regular employee subsequent to the probationary period. (See Section 2-15 for further clarification of a Probationary employee.)

Seasonal Employees are employed in a position generally for a length of time that normally will not exceed six months. This position may be either part-time or full-time and the employee does not receive Town benefits.

Hourly Employees are regular part-time, seasonal, and temporary employees of Lake Hamilton that shall be compensated on an hourly basis and shall be considered as hourly, non-exempt employees and paid on a weekly basis.

Salaried Employees are regular full-time employees of the Town that will receive the same pay not based on hours worked on a weekly basis.

2-14 Employment Status

All employees at the time of hiring shall be designated as exempt or non-exempt.

Exempt Status will include employees classified as executive, administrative or professional employees and other exempt classifications in accordance with the Fair Labor Standards Act and applicable regulations of the United States Department of Labor:

Non-Exempt Status will include employees not falling into one of the exempt categories. All non-exempt employees shall be eligible for overtime pay in accordance with the Fair Labor Standards Act and applicable regulations of the United States Department of Labor.

2-15 Probationary Employment Period

The work and conduct of an employee during the first 90 days of the original employment or re-employment is considered a working test period termed a probationary period during which an employee is employed at will and is terminable at will with or without cause. All regular full-time and part-time employees shall serve a probationary period of six 90 days. Upon successful completion of the probationary period, the employee will become a regular employee. Temporary and seasonal employees are at-will employees for the duration of their employment and do not serve a probationary period.

2-16 Dismissal during Probationary Period

At any time during the probationary period, a probationary employee may be dismissed at anytime with no right of grievance except where discrimination or retaliation is claimed. Employees with charges of discrimination or retaliation have the right of appeal through the grievance procedure described in **Chapter 10**. After successfully completing the probationary period, the probationary employee becomes a regular employee.

2-17 Probationary Period Performance Evaluation

The Town will conduct an initial informal assessment of the employee's ability to perform assigned tasks during the first thirty (30) days of employment and as frequently thereafter as deemed necessary. If it is determined that termination is required, the Town Administrator will be so notified and dismissal will occur promptly. Two weeks prior to completion of the probationary period of a new employee, the Administrator's Office shall send to the supervisor of the employee a performance evaluation form. The supervisor shall review the performance of the employee. The evaluation of performance shall be discussed with the employee pointing out any deficiencies. If the employee's performance evaluation has been rated as satisfactory, the department head will sign and return the evaluation recommending that the probationary employee become a regular employee.

If the employee's performance has not been satisfactory, a discussion will be held with the employee and one or more of the following actions taken:

1. Establish a future review date. The evaluation form will indicate action to be taken or any additional training to be provided. The evaluation form shall be returned to the Administrator's Office for action of follow-up and to be filed in personnel file.
2. Extend the probationary period. The Town Administrator may extend the probationary period for a period not to exceed three (3) months if the department head believes that an extension is in the best interest of the Town and/or the employee.
3. Terminate the employee with approval from the Town Administrator.

2-18 Probationary Period Benefits

A new regular, full-time employee serving a probationary period accrues from date of employment, benefits to which he or she is entitled as herein set forth, including appropriate leave (vacation, sick, etc.) at the prescribed rates and all other benefits such as health insurance, life insurance and the retirement plan will be effective to the extent of eligibility.

2-19 Employee Promotion

A promotion is the change of an employee from one position in the Town to another position in the Town with a higher maximum pay rate. It shall be the policy of the Town to fill vacant positions, whenever possible, by promotion of employees who are best qualified for advancement. All eligible employees in the Town shall be eligible to apply for promotion. The Administrator shall determine the process to use for filling the vacant position by promotion.

Updated 09/2022

2-20 Layoff

The Town Administrator will maintain a seniority list. In the event that the Administrator concludes it is in the best interests of the Town to reduce personnel, temporary employees and those serving a probationary period in affected job classes will be terminated from employment with the Town before other employees in those job classes. Within these groups, the selection of employees to be retained will be based on merit and ability as determined by the Administrator. When all other considerations are equal, the principle of seniority will apply in layoffs and recall from layoff.

2-21 Nepotism

As prescribed by Florida Statutes 112.3135, a public official may not appoint, employ, promote, or advance, or advocate or appointment, employment, promotion or advancement of certain relatives in or to a position the Town or agency which (s)he is serving or over which (s)he exercises jurisdiction or control.

An individual may not be appointed or employed in a position in the Town if a public official serving in or exercising jurisdiction or control over the agency, who is a relative of the individual, had advocated such appointment or employment. No individual who is a relative of a Town employee shall be appointed, employed, promoted, or advance to a position within the same department, including any division within the department, as the relative is employed. Under no circumstances will a member of a family be transferred or promoted to a position where that person has the responsibility for recommending another relative for promotion or advancement.

It shall be the policy of the town not to place immediate family members within the same department or in a supervisor-subordinate relationship. The immediate family shall include spouse, children, stepchildren, brother, sister, parents, guardians, mother-in-law, father-in-law, grandparents, or any other person residing in the household.

2-22 Personnel Files

It is the Town's objective to maintain complete and accurate personnel files on all full-time, part-time, temporary, and seasonal employees. All personnel files will be located in a secure location in the Administrator's Office.

The Personnel File will contain all information required by federal and state law. This includes, but is not limited to, the employee's completed application for employment, interviewing records, Personnel Action Forms, performance reviews, discipline, training records and any policies that the employee had to review and sign. All confidential information will be kept separately to comply with HIPAA regulations and Florida Statutes exemptions from public Records.

Personnel files and the contents of the file are the property of the Town. Individuals, who wish to review their file, may do so by setting an appointment with the Administrative Office. The Town Administrator or his/her designee shall be present while an employee is reviewing the contents of the file. All employee data will be received, retained, and disseminated according to Florida's Government in the Sunshine Law and State of Florida General Records Schedule.

CHAPTER 3

PERFORMANCE MANAGEMENT

3-1 Performance Management Definition

The performance evaluation system is a uniform procedure, which permits the evaluation of the performance of employees in accordance with certain standards and criteria known to both those whose performance is being evaluated and those responsible for conducting the evaluation.

3-2 Purpose

The goal of the performance evaluation system is to permit supervisory personnel to evaluate the performance of employees in the accomplishment of their assigned duties and responsibilities. The evaluation of the performance of employees is to determine how and to what extent employee performance relates to position requirements. This system is intended to serve three main purposes:

1. The first is to ensure that each employee is fully aware of performance standards, which apply to this job. The performance evaluation system contains criteria on which performance is evaluated. Each of these criteria is used to measure how employees performed their assigned duties and responsibilities as explained in the position specifications.
2. The second purpose served by the system is to assist supervisory personnel not only in completing performance ratings, but also in discussing these ratings with the employees. This system is designed to more clearly identify the elements of satisfactory performance and the reasons for a given rating. There are five levels of performance that can be used to describe an employee's performance in each category. These five performance levels are:
(1) Unsatisfactory, (2) Below Expectations, (3) Meets Expectations, (4) Exceeds Expectations, and (5) Outstanding.
3. The third purpose of this system is to assist the supervisor in identifying development needs of subordinate personnel. This guide encourages a detailed review of actual performance deficiencies and weaknesses as they are identified in the performance evaluation. When reviewing the employee's performance evaluation with the employee, these deficiencies can be discussed in detail and specific development programs can be provided to assist the employee in improving his/her total performance. The system requires the supervisor to discuss each employee's development and growth potential, completed goals and objectives and set future goals and objectives.

3-3 Use of Employee Evaluations

Once an employee performance form is completed, it is made a permanent part of the employee's personnel file. The information collected can assist management in identifying deficiencies, outstanding performances, or areas where actions are necessary to better develop the employee. Each supervisor sets goals and objectives for each employee to complete during the upcoming year. This enables both the supervisor and employee to know exactly what is expected. When used properly, the performance evaluation can be advantageous to management and can improve services.

3-4 Salary Adjustment

The employee performance evaluation is designed to encourage improvement and development of employees within the organization. A common understanding that employees and supervisors are all working together for a common purpose can bring about a more efficient working organization. Further, effective periodic ratings tend to improve supervisory practices by bringing supervisors and employees into closer contact and producing mutual understanding. A formal review of an employees' performance is done annually on their employment date.

The performance evaluation is made by the employee's supervisor and reviewed by the Town Administrator. The review should cover the entire preceding review period. Elevation of employees within the salary range shall be made according to satisfactory completion of the requirements of the position in which the employee is functioning. The amount of salary increase available to any covered employee is directly tied to the individual's job performance, with the possibility of merit increases based on an employee's overall rating within their pay bracket. The possibility of merit increases and of any other salary adjustments shall be based upon **budgetary conditions as approved by the Town Council.** Subject to

approval of the Town Council, merit-based salary increases will be available according to the evaluation score as indicated in Appendix B.

- a. Formal evaluations of employee work behavior helps the employer and employee build on the strengths of the employee and identify those areas the employee needs improvement to be more effective and efficient in his/her job.
- b. Performance evaluations enable the creation of reasonable performance standards so that both supervisor and employee are aware of work that is considered "acceptable performance." Because of the active involvement of both the supervisor and the employee in performance evaluations, an important channel of two-way communication is opened. Communication can result in increased cooperation and understanding between supervisors and employees, which in turn can enhance work performance and work environment thus providing better customer service to our community and each other.
- c. Used properly, the Performance Evaluation will:
 - **Inform** - It allows the supervisor and employee to communicate openly about performance. This should happen throughout the year and not only at this time. Issues discussed now should not be unexpected to the employee. It also provides supervisors the opportunity to hear employees' views of the work situation.
 - **Set Goals** - The supervisor and employee mutually establish goals for progress. Goals should be realistic, measurable, and obtainable within one year.
 - **Develop** - The supervisor and employee identify actions that can be taken to enhance development and performance of the employee.
 - **Evaluate** - The supervisor and employee evaluate results based on previously established goals and performance standards, which provides a basis and documentation for promotions, transfers, demotions, terminations and, **where applicable may provide for salary adjustments.**

3-5 Evaluation Process

- a. The performance of employees shall be conducted by their supervisor.
- b. Policies and procedures require that performance evaluations be prepared on the first month and during the sixth month of continuous service for all probationary classified employees.
- c. In order to be granted regular employee classification status, an employee's work performance, as measured in his/her 90-day performance evaluation, must meet acceptable standards. The probationary performance evaluation is a continuation of the initial examining process and is more important than a written test or interview since "on-the-job" performance is measured. The supervisor should complete the evaluation with utmost deliberation. Once assigned as a regular classified employee, the employee will be evaluated on a yearly basis on his/her hire date. Additional evaluations may be required upon request of the Town Administrator, or the appropriate Department Head. Exempt employees will be evaluated once a year on their date of hire.

The quality of an employee's past performance will be considered in personnel decisions. Performance reviews will be discussed with the employee. Employees do not have the right to change or grieve their performance review, but may submit a written response, which will be attached to the performance review.

Signing of the performance review document by the employee acknowledges that the review has been discussed with the supervisor and does not necessarily constitute agreement. Failure to sign the document by the employee will not delay processing. An employee's salary increase may be withheld, or the salary may be decreased due to performance deficiencies.

The Performance Evaluation Form for Non-Exempt Employees – (See Appendix C)
The Performance Evaluation Form for Exempt Employees - (See Appendix D)

CHAPTER 4

COMPENSATION

4-1 Position Classification and Pay Plan

The Town Administrator is responsible for the administration of the Position Classification and Pay Plan, and to ensure that the plan is administered in a fair and equitable basis.

4-2 Interpretation

The Town Administrator shall be responsible for applying the Position Classification and Pay Plan with respect to issues not specifically covered by the plan using the policies expressed herein as a guide.

4-3 Review and Revisions

Department heads shall be responsible for bringing to the attention of the Town Administrator any substantial change in duties, responsibilities, or other factors affecting the classification of any position in their respective departments. Upon receipt of such information, the Town Administrator shall review the position and determine if the classification should be changed.

The Town Administrator shall review the Position Classification and Pay Plan for adequacy prior to the submission of the annual budget to the Town Council. In conducting the review, consideration shall be given to current cost of living and the Town's financial position. Based on the findings, the Town Administrator may recommend revisions in the plan to the Town Council.

4-4 Employee Classifications

All full time and part-time regular town positions, except for the Town Attorney, and Elected Officers, are included in the Position Classification and Pay Plan. All regular positions in the Town are grouped together into classifications. Each position in the Town is classified according to the type of work and the amount of responsibility in the position. Similar positions with like duties and responsibilities are placed in the same pay grade. Each position has an established pay grade and a job description of the duties and qualifications of the position. (See Appendix A)

4-5 Classification of New Positions

To establish a new position in the Town, the appropriate department head shall prepare a new personnel request form and a job description for the proposed position with the assistance of the Town Administrator. The final draft should be submitted to the Town Council for review and approval.

If the Town Council approves the establishment of the new position, it shall be allocated to one of the classes in the Position Classification and Pay Plan. In the event a suitable class does not exist, the Town Administrator shall establish a new position classification and assign an appropriate pay grade to the class. The proposed position would be presented to the Town Council for final approval.

4-6 Appeals and Reclassification

If an employee has facts, which indicate that his/ her position is improperly classified, a request may be made to the Town Administrator to review the classification of the position. Such requests shall be submitted in writing, through the employee's department head. All requests for review of classification shall contain a statement of justification. The Town Administrator's decision regarding classification shall be final.

An employee whose position is reclassified upward may receive two and a half (2 1/2) percent above the present salary, or the minimum of the new grade, as determined by the Town Administrator. The compensation for an employee whose position is reclassified downward will remain the same. However, the employee will not be eligible to receive salary increases other than across the board pay level revisions or adjustments to that particular grade due to market adjustments.

4-7 New Employees

A new employee of the Town shall normally be paid the minimum rate of pay for the grade. A new employee with unusual experience may be paid within the grade, commensurate with the performance capability associated with the experience. Any rate paid to a new employee above the minimum for the classification requires a written description of the experience justifying the rate paid and written approval of the Town Administrator and the Town Council.

4-8 Job Descriptions

All positions listed on the Employee Classification Plan will have an associated job description. Job descriptions will be reviewed, as necessary, by the supervisor and employee, on an annual basis at the time of the annual performance evaluation. Each job description will include position title, department, supervisor's title, FLSA status (exempt or nonexempt), primary objective of the position, essential functions of the position, examples of performance criteria, minimum requirements, desirable training and experience, supervisory responsibilities (if any), and extent of supervisory direction or guidance provided to position. Good attendance and compliance with work rules and policies are essential functions of all Town positions.

The Department Head will give suggested revisions to Town Administrator. Town Administrator will update the job description as necessary. Job descriptions may be updated more often as duties and responsibilities change. The employee shall be given a copy of his/her respective job description and shall also sign and date a copy of the job description for placement in his/her personnel file.

4-9 Pay Policies

It is the policy and practice of the Town of Lake Hamilton to accurately compensate employees and to do so in compliance with all applicable state and federal laws. (See Appendix A)

4-10 Working Hours

Forty (40) hours shall be the maximum normal workweek for payroll calculations. The department heads with the approval of the Town Administrator will establish work schedules for employees. The regular workweek for most employees is five eight-hour days, Monday through Friday. Flex schedules may be authorized by the Town Administrator to address weekend Town Operations. The Police Chief or his/her designee shall maintain adequate scheduling of police officers as required for the public safety of our community 24 hours, 7 days a week.

All employees of the Town shall be required to observe all practices relating to hours of work, safe working requirements and lunch periods. It is, therefore, fair for the Town to expect the time paid for to be time worked, with due regard for health and safety.

4-11 Record of Time Worked

The department head is required to submit the department's time to Payroll Department to include all leave request forms for the pay period. Full-time, non-exempt employees are expected to work 40 hours per workweek and will be paid according to the time reported on their time sheets. To comply with the provisions of the federal and state Fair Labor Standards Acts, hours worked, and any leave time used by non-exempt employees are to be recorded daily and submitted to payroll on a weekly basis. Each time reporting form must include the signature of the employee and immediate supervisor. Reporting false information on a time sheet may be cause for immediate termination.

4-12 Garnishments

The Town of Lake Hamilton is obligated by federal and state law to withhold money from an employee's paycheck for child support, unpaid student loans, unpaid medical bills, unpaid taxes, or any other judgment ordered by the Court.

4-13 Overtime

The Town has established this overtime policy to comply with applicable state and federal laws governing accrual and use of overtime. The Administrator will determine at the time of hiring, whether each employee is designated as "exempt" or "non-exempt" from earning overtime. In general, employees in executive, administrative and professional job classes are exempt; all others are non-exempt. See Position Classification and Pay Plan, (See Appendix A)

All non-exempt employees will be eligible for overtime compensation in accordance with the law. The overtime compensation will be paid at a rate of time and one-half hours for every hour worked over 40 hours. The department head will approve overtime in advance. This approval will be in writing and will be sent to payroll with timesheets. Emergency call out is exempt from prior approval. Disciplinary action may be taken if unauthorized overtime is taken. Vacation, sick leave, and paid holidays do not count toward "hours worked". Compensation will take the form of either time and one-half pay or compensatory time. Compensatory time is paid time off at the rate of one and one-half hours off for each hour of overtime worked. Nothing less than 1 hour can be used for compensatory time.

4-14 Compensatory Time / Non-Exempt (Overtime-eligible) Employees

Employees may accrue compensatory time as authorized by the Town Administrator. The maximum compensatory time accumulation for any employee is 40 hours per year. Once an employee has earned 40 hours of compensatory time in a calendar year, no further compensatory time may accrue in that calendar year. All further overtime will be paid. Employees may request and use compensatory time off in the same manner as other leave requests.

All compensatory time will be marked as such on official timesheets, both when it is earned and when it is used. The department supervisors will maintain compensatory time records. Compensatory time accrued will be paid when the employee leaves Town employment.

4-15 Call Back Pay

Employees working in the Public Safety Department (Police and Public Works) are required to be available after regular working hours. Employees that either are required to work on the weekend or after hours to check the plant or for an emergency will be paid a minimum of 2 hours per call back at the employee's overtime rate of pay. If the time exceeds two hours, the employee will be paid for actual time worked. Overtime will then be paid if the employee has already worked 40 hours that pay period. Employees who are qualified to check the plant or answer emergencies will be rotated through the Call Back schedule.

4-16 Longevity Pay

Employers give their employees longevity pay to recognize and reward the length of their tenures. Government agencies implement longevity pay to help attract and retain top employees. The Town of Lake Hamilton consider this type of compensation to recognize loyalty and to inspire new or potential employees to see that the town values experience and loyalty. Longevity pay may be given along with other raises, such as promotions, cost-of-living increases, pay-for-performance or other raises. (See Appendix A)

4-17 Standby Pay (Public Works Department)

Where the employer requires an employee to be available on standby during off-duty hours, an employee shall be entitled to a standby payment as indicated below. An employee designated by their supervisor or by list for standby duty shall be available during his/her period of standby at a known telephone number and be available to return for duty as quickly as possible if called. In designating employees for standby, the employer will endeavor to provide for the equitable distribution of standby duties among readily available, qualified employees who are normally required, in their regular duties, to perform that work.

An employee on standby who is required to return to the workplace shall be paid, in addition to the standby pay, the appropriate overtime rate for all hours worked, subject to a minimum payment of ~~two (2) hours~~ **\$14.00 a day**. No standby payment shall be granted if an employee is unable to report for duty when required. Except in the case of an emergency, standby schedules shall be posted fourteen (14) days in advance. The Standby schedule shall not exceed seven (7) consecutive days. (See Appendix A)

4-18 Paychecks

Employee paychecks shall be distributed **bi-weekly**. Payroll shall be accomplished in a timely manner using accurate, consistent procedures. When paydays fall on a holiday, checks are normally issued the day before the holiday. Paychecks will not be given to anyone other than the person for whom they were prepared unless the employee has authorized the Town to give the other person(s) the check. Checks will be given to the spouse, or another appropriate immediate family member, in the case of a deceased employee.

4-19 Employee Status Change

Employees are responsible for notifying the Administration of any change in status including changes in address, phone number, names of beneficiaries, marital status, etc. It is the responsibility of the employee to report any discrepancies on the paycheck to Administration.

Updated 09/2022

4-20 Exempt (non-overtime-eligible) Employees:

Exempt employees are expected to work the hours necessary to meet the performance expectations outlined by their supervisors. Generally, to meet these expectations, and for reasons of public accountancy, an exempt employee will need to work 40 or more hours per week. Exempt employees do not receive extra pay for the hours worked over 40 in one workweek.

Exempt employees are paid on a salary basis. This means that they receive a predetermined amount of pay each pay period and are not paid by the hour. Their pay does not vary based on the quality or quantity of work performed, and they receive their full weekly salary for any week in which any work is performed.

The Town will only make deductions from the weekly salary of an exempt employee in the following situations:

- The employee is in a position that does not earn vacation or personal leave and is absent for one or more full days for personal reasons other than sickness or accident.
- The employee is absent for a full workweek, and, for whatever reason, the absence is not charged to paid leave (for example, a situation where the employee has exhausted all his/her paid leave or a situation where the employee does not earn paid leave).
- The very first workweek or the very last workweek of employment with the Town in which the employee does not work a full week. In this case, the Town will prorate the employee's salary based on the time actually worked.
- The employee is in a position that earns paid leave and is absent for a more than four (4) hours on a given day due to personal reasons, illness, or injury, but:
 - Paid leave has not been requested or has been denied.
 - The employee does not yet qualify for paid leave.
 - Paid leave is exhausted.
 - The employee has specifically requested unpaid leave.
- The employee is suspended without pay for a full day or more for disciplinary reasons for violations of any written policy that is applied to all employees.
- The employee takes an authorized unpaid leave under Section 5-11.
- The Town may for budgetary reasons implement a voluntary or involuntary unpaid leave program and, under this program, make deductions from the weekly salary of an exempt employee. In this case, the employee will be treated as non-exempt for any workweek in which the budget-related deductions are made.

The Town will not make deductions from pay due to exempt employees being absent for jury duty or attendance as a witness but will require the employee to pay back to the Town any amounts received by the employee as jury fees or witness fees.

If the Town inadvertently makes an improper deduction to the weekly salary of an exempt employee, the non-exempt employee should immediately report this to the supervisor or to the Administrator. If it is confirmed that an improper deduction has occurred, the Town will reimburse the employee and make appropriate changes to comply in the future.

CHAPTER 5

LEAVE TYPE POLICIES

5-1 Holidays

The Town observes certain days throughout the year as holidays and all regular full-time employees who are not required to work on the holiday are given leave with pay.

The giving of holidays is a benefit provided by the Town and may be changed or altered from time to time by the Town Council of Lake Hamilton. If there are any changes to the schedule, the Town Administrator will notify all employees.

- New Year's Day
- Martin Luther King Day
- Presidents Day
- Good Friday (Half Day)
- Memorial Day
- Juneteenth (Add)
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day
- Friday after Thanksgiving
- Christmas Eve
- Christmas Day

*Holidays may be adjusted by Department head as needed for operations.

Whenever any observed holiday falls on Saturday, the Friday proceeding such day, or whenever such day falls on Sunday, the Monday next following such day, shall be observed as the holiday for purposes of leave absences.

The Town Council may grant additional holiday time off or may delegate to the Town Administrator authority to declare certain days or parts of days as paid leaves of absences as may be deemed appropriate.

5-2 Eligibility - Holiday Pay

In order for a Full-Time employee to receive payment for a holiday he/she must work the last regularly scheduled workday before and the first regularly scheduled workday after the holiday or be on approved leave status. Full-time employees will receive pay for official holidays at their normal straight time rates. Any employee on a leave of absence without pay from the Town is not eligible for holiday pay. Employees may request vacation time to coincide with the holidays, as long it is approved by the Administrator and does not disrupt regular town service. No one employee shall continually have his or her vacation coincide with the same major holiday if another employee request that time off. If an employee calls in sick before or after a holiday, it shall not be paid unless a doctor's note is provided.

5-3 Leave Policy for Exempt Employees

Management employees are required to work the number of hours necessary to fulfill their responsibilities including evening meetings and/or on-call hours. The normal hours of business for management staff are Monday through Friday, 8 a.m. to 4 p.m., plus evening meetings as necessary. Management employees are required to use paid leave when on personal business or away from the office for four (4) hours or more, on a given day. Absences of less than four (4) hours do not require use of paid leave as it is presumed that the staff member regularly puts in work hours beyond the normal 8 a.m. to 4 p.m. Monday through Friday requirement. Management employees must communicate their absence to the Administrator.

If one of the above employees regularly absents themselves from work under this policy and it is found that there is excessive time away from work, which is not justified, the situation will be handled as a performance issue. If it appears that less than forty (40) hours per week is needed to fulfill the position's responsibilities, the position will be reviewed to determine whether a part-time position will meet the needs of the Town. The Administrator for specific situations as determined necessary may adopt additional notification and approval requirements.

All exempt positions, whether or not management, may require work beyond forty (40) hours per week. In recognition for working extra hours, these employees may take some time off during their normal working hours with supervisory approval. The time off for extra hours will not be on a one-for-one basis.

5-4 Vacation Leave

Purpose

The Town recognizes the need for employees to have time away from normal work activity and other personal reasons. Approved vacations contribute to the maintenance of employee health and morale and are therefore beneficial to the operation of Lake Hamilton government. Every eligible employee is encouraged to use this benefit and take annual vacation leave.

Policy

Regular Employee's Vacation leave may be used at the employee's discretion and with supervisor's approval only after the hours are earned. The Town reserves the right to designate when some or all vacation leave may be taken and bears the responsibility to ensure the time off is prescheduled and coordinated with other time off. Vacation leave with pay may not be taken prior to the time it is recorded and available for use. Employees who become sick on scheduled vacation time off may substitute vacation with sick days provided verification of illness by a doctor and approval of the supervisor. The minimum amount of time that may be charged against vacation leave is four (4) hours. Probationary Employees are not eligible for vacation leave until they have completed their probationary period.

Accrual- Vacation leave is accrued on the last day of the pay period. It is recorded and available for use the day following the issuance of the paycheck for the period of accrual. An employee must have active payroll status during the following pay period to be credited for the previous week's accrued vacation leave.

Hours of Accrual Annually

Hire date up to Five years of service:	80 Hours		2 Weeks
Five years but less than Ten years of service:	100 Hours	120	2½ 3 Weeks
Ten years of service and over:	120 Hours	160	3 4 Weeks

Regular full-time employees in positions normally scheduled to work greater or fewer than 40 hours per week will accrue vacation leave on a prorated basis. This will be calculated from the normal scheduled hours for the individual employee.

Maximum Accrual- The maximum number of vacation leave hours that may be accrued and carried forward shall not exceed 25% of their annual accrual rate. Any hours accrued in excess of 25% of their annual rate will be forfeited if not used by the end of the fiscal year **additional can be approved based on work environment**. This allows employees to carry excess vacation hours through the fiscal year.

Vacation leave shall be taken at a time convenient to the town and approved by the Administrator or supervisor. All employees eligible for vacation leave are encouraged to take a vacation period of two weeks each year. The Administrator or supervisor may grant shorter periods of vacation leave as needed. Preference in the scheduling of vacation time shall be given to employees in order of their total length of employment with the town. However, every effort should be made to alternate vacations between employees of the same department that coincide with major holidays.

Upon voluntary termination the eligible employee shall be paid for the unused portion of their accumulated vacation leave. (See Chapter 11)

REQUESTS FOR VACATION / ANNUAL LEAVE

- Submits a Leave Request Form to the Department Head. The Administrator or his /her designee prior to date of leave must approve vacation requests. Town administration shall notify employee of approval / disapproval prior to date of leave in writing.
- Examines request and determines whether approval is appropriate. In making the decision:
 - Ensures requested vacation will allow maintenance of adequate staffing levels at all times.
 - Ensures operational needs of the town can be met in the absence of the employee.
 - Attempts to resolve any scheduling conflicts with employees involved.

Updated 09/2022

5-5 SICK LEAVE

Purpose

To define use, accrual, and administration of sick leave for Lake Hamilton employees.

Background

Town of Lake Hamilton recognizes the right of employees to legitimately use sick leave benefits although every employee is expected to strive for a goal of no absences. Unplanned employee absenteeism affects the provision of service to internal and external customers and increases the workload on remaining employees.

Definition of Immediate Family

1. The employee's spouse as recognized in the State of Florida.
2. The biological, adopted, or foster child of the employee.
3. A child who is a legal ward, or a child of a person standing in loco parents who is under 18 years of age, or 18 years of age or older and incapable of self-care because of a mental or physical disability.
4. The employee's parent or guardian.
 - Child - Minor or adult, including foster and stepchildren.

Policy

Sick leave may be used for the health and wellness of the employee and his/her immediate family. Sick leave may be used for necessary medical appointments (including dental and optical), treatments, injury, disability, paternity or quarantine by health authorities or physician.

Sick leave with pay may not be taken prior to the time it is recorded and available for use. Once an employee has used all of their accrued sick leave, they may be required to substitute other available paid leave to be used as sick leave. For payroll purposes, sick leave is used from currently accrued balance. The smallest amount of time that may be charged against sick leave is one (1) of an hour. Employees may not use sick leave for illness or injury sustained while engaged in outside (secondary) employment.

Sick Leave Accrual- Sick leave accrual begins with the first pay period of employment with the Town and is accrued on the last day of that pay period. An employee must have active payroll status during the first day of the following pay period to be credited for sick leave accrued during the previous pay period.

No limit is placed upon the number of sick leave hours that may be accumulated for use by an employee.

Regular full-time employees in positions normally scheduled to work at least 40 hours per week will accrue sick leave each weekly pay period. The hours of sick leave with pay will equal 2.5 percent of the average regularly scheduled weekly hours for the position.

[For example, a 40-hour employee will accrue One hour weekly;] (52 hours annually)

SICK LEAVE REPORTING

1. Report any absences to the immediate supervisor using the method and timeline established by the supervisor, and request the use of sick leave.

[NOTE: For any excessive sick leave taken, an employee may be required to supply proof of illness, injury, or disability, by submitting a physician's statement at his or her own expense. Failure to provide such documentation may result in corrective action.] Sick leave may not be used for any purposes other than those defined herein.

2. Examines request, determines whether approval is appropriate, and acts accordingly.
3. Determines whether employee has completed probationary period, including any extension.

[NOTE 1: New employees eligible for sick leave will accrue sick leave during the probation period. They are not eligible to use any paid sick leave until successful completion of the probation period unless approved in advance by management.]

[NOTE 2: Sick leave for a probationary employee is recorded and available for use the day following the issuance of the first paycheck after the employee has been placed on regular status.]

4. Where sick leave appears to be abused, or where sick leave is consistently used as it is earned - Requires the employee to furnish medical certification as to the cause of their sickness. Abuse of sick leave will constitute cause for corrective action.
5. Ensure time records are accurately recorded and submitted

5-6 Donation of Sick Leave

In situations where an employee has depleted all his/ her accumulated leave, or in situations where the employee has not been employed long enough to accumulate enough sick leave or vacation time, other employees may wish to donate a designated amount of their accumulated leave to the employee. If an employee is interested in donating a designated amount of their leave to another employee, a donation of Sick Leave Form must be completed and submitted to the Administrators Office for verification purposes.

The donation process is designed to assist employees who have catastrophic personal injury or illness such as heart attack, cancer, or a serious car accident. (The examples are not all inclusive.) Sick leave may not be donated for minor injury or short-term illness (cold, flu or virus), elective surgery or injuries or illnesses covered under workers compensation.

In order to be eligible to receive donated sick leave an employee must:

- Have medical documentation.
- Have used all forms of accumulated leave days, including sick time, vacation time and compensatory time.
- Be absent in excess of three consecutive weeks or have a physician certification stating the anticipated absence will be in excess of three consecutive weeks.

The donating employee must retain no fewer than 30 days (240 hours) of sick leave on record (after the donation). Once an employee has donated sick leave, the donor cannot retrieve any portion of the donated leave. The Town Administrator will review each request. The decision of the Town Administrator will be final.

5-7 Bereavement Leave An employee may take bereavement leave following the death of a member of the employee's immediate family, as provided below.

Employee

1. Informs Administration that bereavement leave will be needed and requests time off.

[NOTE 1: Bereavement leave must be within five calendar days of the time of death or funeral and will be compensated at straight time base pay.]

[NOTE 2: The maximum paid bereavement leave is (3) three consecutive workdays.]

2. Upon request, provide proof of the death. Proof must include the name of the deceased, their relationship to the employee, and the location of the memorial (city and state and/or country).

[NOTE: If verification is not provided in a timely manner, the employee will be required to use vacation leave, the sick leave for the time they were absent. Any additional bereavement leave or bereavement leave for individuals not specifically listed in this policy shall require the use of accumulated vacation leave, then sick leave; otherwise, the bereavement leave will be considered an unpaid leave of absence.]

3. If applicable, attaches verified proof to the leave request form and submit it to the Town Administrator.

Definition of "Immediate Family"

The term "Immediate Family" as it applies to the use of Bereavement Leave shall include the employee's spouse, children, stepchildren, parents, parents-in-law, guardians, daughter-in-law, son-in-law, brother, sister, brother-in-law, sister-in-law, grandparents, grandchildren, and any relative living in the employee's household.

5-8 Court / Jury Duty

Regular full-time and part-time employees will be granted paid leaves of absence for required jury duty. Such employees will be required to turn over any compensation they receive for jury duty, minus mileage reimbursement, to the Town to receive their regular wages for the period. Time spent on jury duty will not be counted as time worked in computing overtime. Employees excused or released from jury duty during their regular working hours will report to their regular work

duties as soon as reasonably possible or will take accrued vacation or compensatory time to make up the difference. Employees are required to notify their supervisor as soon as possible after receiving notice to report for jury duty. The employee will be responsible for ensuring that a report of time spent on jury duty and the Clerk of Court completes pay form so the Town will be able to determine the amount of compensation due for the period involved.

Temporary and seasonal employees are generally not eligible for compensation for absences due to jury duty but can take a leave without pay subject to department head approval.

Jury Duty Procedures

Employee

1. Notifies Administration of a summons for jury duty within 24 hours of receipt whenever possible, but in no event later than the beginning of the next work shift.
2. Provides a copy of jury summons to Administration.
3. *When released or excused from jury duty* – Notifies the supervisor as quickly as possible of ability to return to work.
4. Requests a certification of attendance record from the Court upon dismissal from jury duty and prior to returning to work.
5. Submits the certification of attendance along with a leave request indicating absence due to jury duty, to the Supervisor immediately upon returning to work.

[NOTE: Failure to provide a certification of attendance from the Court shall result in the employee not being paid for the time spent on jury duty and that time being considered an unexcused absence from work.]

6. Allowances or fees for jury service are to be retained by the employee.
7. Ensure employee is paid their appropriate rate of pay for the actual hours they are required to be absent from Scheduled work.
8. *Should an employee be scheduled for jury duty on vacation time* – Reinstates the vacation hours and ensures employee receives their straight time base pay for hours served.

5-9 Court / Witness Duty

Employee

1. Notifies the Administration of a responsibility to report to court as soon as possible.

[NOTE: If an employee becomes a defendant or is a potential defendant in a pending or threatened lawsuit because of their Town duty, they shall inform the Administrator in writing within 48 hours of the employee's awareness. Disclosure must include the precise date, time, and manner of service of process or other notice.]

2. Requests a certification of attendance record from the Court upon dismissal from witness duty and prior to returning to work. The certification of attendance or other adequate evidence to prove attendance at the proceeding is needed whether paid by the Town or not, for that time.
3. Submits the certification of attendance along with a leave request indicating absence due to witness duty to the supervisor immediately upon returning to work.

[NOTE: Failure to provide a certification of attendance from the Court shall result in the employee not being paid for the time spent on witness duty, and that time being considered an unexcused absence from work.]

4. Allowances or fees are to be retained by the employee.

5. *Should an employee be directed by Town to appear either at an administrative hearing or Court hearing on vacation time* – Reinstates the vacation hours and ensures employee receives their straight time base pay for hours served.

5-10 Court / Town Business

Employees will be paid their regular wage to testify in court for Town-related business. Any compensation received for court appearances (e.g., subpoena fees) arising out of or in connection with Town employment, minus mileage reimbursement, must be turned over to the Town.

5-11 Leave of Absence with Out Pay

Unpaid leaves may be approved in accordance with the Town personnel policies. Employees must normally use all accrued annual leave prior to taking an unpaid leave. Leave without pay may be granted to an employee for any good cause when it is in the interest of the Town. The Administrator may grant an employee leave without pay for a specified time not to exceed twelve weeks. Any appointment made to a position vacated by an employee on leave without pay shall be conditional upon the return of the employee on leave.

Leave without pay shall be subject to the following provisions:

- A formal written request shall be submitted to the Town Administrator.
- At the expiration of leave without pay, the employee shall return to the position held prior to the leave.
- Vacation and sick leave credits shall not be earned during leave without pay.
- A leave without pay shall not constitute a break in service, but time off will not be credited toward any retirement.
- Leave without pay during the probationary period shall not be authorized.
- Failure to report promptly at the expiration of a leave of absence shall be considered a resignation.

5-12 Job Related Injury or Illness

All employees are required to report any job-related illnesses or injuries to the Town Administration and their supervisor immediately (no matter how minor). If a supervisor is not available and the nature of injury or illness requires immediate treatment, the employee is to go to the nearest available medical facility for treatment and, as soon as possible, notify his/her supervisor of the action taken. In the case of a serious emergency, 911 should be called. If the injury is not of an emergency nature, but requires medical attention, the employee will report it to the supervisor and arrange for a medical appointment.

Worker's compensation benefits and procedures to return to work will be applied according to applicable state and federal laws. The Town will provide full pay and benefits for 180 calendar days. Workmen's Compensation benefits are to be refunded to the employer during this 180-day period. At the end of the 180-day period, the employee is entitled to use accumulated sick leave and vacation leave time off and to retain all workmen's compensation benefits unless, upon review, the Town Council extends the 180-day period.

5-13 Returning to Work After a Medical Absence

After a medical absence, a physician's statement is required on the employee's first day back to work, indicating the nature of the illness or medical condition and attesting to the employee's ability to return to work and safely perform the essential functions of the job with or without reasonable accommodation.

Any work restrictions must be stated clearly on the return-to-work form. Employees who have been asked to provide such a statement may not be allowed to return to work until they comply with this provision. Sick leave may be denied for any employee required to provide a doctor's statement until such a statement is provided.

The Town has the right to obtain a second medical opinion to determine the validity of an employee's worker's compensation or sick leave claim, or to obtain information related to restrictions or an employee's ability to work. The Town will arrange and pay for an appropriate medical evaluation when the Town has required it.

Medical Certification

The physician's certification is to state the nature and duration of the illness or injury and verify that the employee is unable to perform the duties and responsibilities of his/her position. A statement attesting to the employee's ability to return to work and perform the essential functions of the job and a description of any work restrictions may also be required before the employee returns to work. Employees in the public works department and police department may not be allowed to return to work until their doctor has released them for full work duty (no restrictions).

5-14 MILITARY DUTY LEAVE

State and federal laws provide protections and benefits to Town employees who are called to military service, whether in the reserves or on active duty. Such employees are entitled to a leave of absence without loss of pay, seniority status, efficiency rating, or benefits for the time the employee is engaged in training or active service not exceeding a total of 15 days in any calendar year.

The leave of absence is only in the event the employee returns to employment with the Town as required upon being relieved from service or is prevented from returning by physical or mental disability or other cause not the fault of the employee or is required by the proper authority to continue in military or naval service beyond the fifteen (15) day paid leave of absence. Employees on extended unpaid military leave will receive fifteen (15) days paid leave of absence in each calendar year, not to exceed five years.

Where possible, notice is to be provided to the Town at least ten (10) working days in advance of the requested leave. If an employee has not yet used his/her fifteen (15) days of paid leave when called to active duty, any unused paid time will be allowed for the active-duty time, prior to the unpaid leave of absence.

Employees returning from military service will be reemployed in the job that they would have attained had they not been absent for military service and with the same seniority, status and pay, as well as other rights and benefits determined by seniority. Unpaid military leave will be considered hours worked for the purpose of vacation leave and sick leave accruals.

Eligibility for continuation of insurance coverage for employees on military leave beyond fifteen (15) days will follow the same procedures as for any employee on an unpaid leave of absence.

Military Leave Procedures - Employee

1. Presents a copy of official orders to report for duty to the Town Administration – along with a written request for leave – at least one month prior to the start date of the orders.
2. Reviews request for Military Leave and submit to the Town Administrative Office.
3. Works with employee to ensure Military Duty Leave is properly paid and administered.

a. During periods in which the employee is ordered to active duty for training – Ensures they are granted leave with full pay and without loss of benefits (including retirement) and count the time on leave as continuous service.

b. Whether continuous or intermittent, such paid leave under this subsection shall not exceed 17 working days in any 12-month period. Each shift equals one working day leave of absence.

[NOTE: Any absence more than 17 working days under this subsection may be covered by accrued and available vacation leave or be an excused absence without pay.]

c. An employee who is a member of the National Guard or Reserve component of the Armed Forces of the United States can be granted leave of absence from their respective duties to perform active military service.

[NOTE 1: The first 30 days of any such leave will be with full pay and the employee is entitled to preserve a benefits and retirement privileges. This time will be counted as continuous service.]

[NOTE 2: After the initial 30 days, the Town shall supplement the military pay to bring the employee's pay to the level at the time they were called to active duty as provided in §115.09 and §115.14 of the Florida Statutes.]

d. Any employee who is ordered to report for a physical examination with the selective service system will be granted paid leave for this purpose upon presentation of official orders.

5-15 Maternity Leave

Employees unable to work due to pregnancy or complications related to pregnancy shall be entitled to the same paid sick leave and temporary disability benefits as any other employee unable to work due to illness or injury. All Maternity leave will follow the laws of the Family and Medical Leave Act.

5-16 Administrative Leave

The Town Administrator may place an employee on administrative leave when it is in the best interest of the Town to remove the employee from the worksite. The employee may be placed on administrative leave during an investigation. The employee will stay on administrative leave as deemed necessary by the Town Administrator. The employee will be paid his/her full salary for the duration of the leave. Time designated, as administrative leave with pay will not be charged to the employee's paid leave.

5-17 Elections / Voting

An employee selected to serve as an election judge pursuant to Florida law, will be allowed time off without pay for purposes of serving as an election judge, provided that the employee gives the Town at least ten (10) days written notice.

All employees eligible to vote at a State general election, at an election to fill a vacancy in the office of United States Senator or Representative, or in a Presidential primary, will be allowed (1 HOUR) time off with pay to vote during the morning of election day. Employees wanting to take advantage of such leave are required to work with their supervisors to avoid coverage issues.

5-18 Family and Medical Leave Act (FMLA)

Lake Hamilton is a covered employer under the FMLA as it applies to all public agencies, including state, local and federal employers, and local education agencies (schools). However, to be eligible for FMLA leave, an employee must work for a covered employer and:

- have worked for that employer for at least 12 months; and
- have worked at least 1,250 hours during the 12 months prior to the start of the FMLA leave; and
- Work at a location where at least 50 employees are employed at the location or within 75 miles of the location.

Given the employee eligibility requirements, even though Lake Hamilton is covered by the FMLA, only employees in cities with more than 50 employees have the potential to qualify for FMLA protected leave. Therefore, the Town of Lake Hamilton does not include an FMLA policy in these personnel policies.

CHAPTER 6

INSURANCE AND OTHER EMPLOYEE BENEFITS

This chapter provides a summary of benefits programs currently offered by the Town. These benefits may change, and nothing in this Handbook should be interpreted as guaranteeing any particular benefit except as required by law. While this is provided as summary information, the actual terms of the benefits are generally as stated in other documents, such as the plan documents for any health insurance or retirement benefits plan.

6-1 Health, Life Insurance, STD & LTD

The Town currently contributes 100% of the premium cost for only the employee's health, life insurance benefits, short-term disability, and long-term disability. No Dependent coverage offered.

For information about coverage and eligibility requirements, employees should refer to the summary plan description or contact the Town Administration.

6-2 Retirement

The Town participates in a 457(b)-retirement plan, **451-retirement plan**. The town will match an employee's contribution up to ~~3%~~ **6%** of annual pay (not including overtime pay) **after one year**. An employee is vested after ~~ten one (10)~~ **1** years of service and contribution to the plan with the town and can be entitled to the employer portion of the contribution.

For information about coverage and eligibility requirements, employees should refer to the summary plan description or contact the Town Administration.

6-3 Employee Training and Conferences

The Town encourages staff development as an essential, ongoing function needed to maintain and improve cost effective quality service to residents. The purpose for staff development is to ensure that employees develop and maintain the knowledge and skills necessary for effective job performance and to provide employees with an opportunity for job enrichment and mobility.

Policy

The Town may cover the costs of an employee's participation in training and professional conferences if attendance is **Budgeted and approved by the Town Council in advance**. The Town Administrator must approve all requests for training and conferences. If the employee leaves employment voluntarily within six months of receiving any staff development costing over \$150.00, employee will be required to reimburse employer for full amount paid by employer for said development.

- **Job-Related Training & Conferences**

The subject matter of the training session or conference must be directly job-related and relevant to the performance of the employee's work responsibilities. CLE or similar courses taken by an employee to maintain licensing or other professional accreditation will not be eligible for payment under this policy unless the subject matter relates directly to the employee's duties. This is the policy though the employee may be required to maintain such licensing or accreditation as a condition of employment with the Town.

- **Request for Participation in Training & Conferences**

The request for participation in a training session or conference must be submitted in writing to the Administrator's Office on the appropriate form. All requests must include an estimate of the total cost (training session, travel, meals, etc.) and a statement of how the education or training is related to the performance of the employee's work responsibilities with the Town. Payment information such as invoices, billing statements, etc., regarding the conference or training should be forwarded to Administration for prompt payment.

6-4 Memberships and Dues

The purpose of memberships to various professional organizations must be directly related to the betterment of the services of the Town. Normally, one Town membership per agency, as determined by the Administrator is allowed, providing funds are budgeted.

6-5 Travel & Per Diem Allowance

If budgeted, employees may be required to travel outside of the area in performance of their duties as a town employee. When this occurs, the employee will receive reimbursement of expenses for meals, lodging and necessary expenses incurred. However, the Town will not reimburse employees for meals connected with training or meetings within Town limits, unless the training or meeting is held as a breakfast, lunch, or dinner meeting. Per Diem will be paid based on allowable rates per Florida Statutes. Employees who find it necessary to use their private automobiles for Town travel and who do not receive a car allowance will be reimbursed at the prevailing mileage rate as established by the allowable IRS rate.

CHAPTER 7

EMPLOYEE RESPONSIBILITIES

7-1 Standards of Conduct and Performance

In accepting Town employment, employees become representatives of the Town and are responsible for assisting and serving the citizens for whom they work. Employees should exhibit conduct that is ethical, professional, responsive, and standards becoming of a Town employee. To achieve this goal, employees must adhere to established policies, rules, and procedures and follow the instructions of their supervisors. An employee who violates any of the standards of conduct or rules or regulations may be subject to disciplinary action. Such action is designed, and is to be used, as a corrective measure and shall not be based on an employee's race, color, religion, national origin, marital status, political affiliation, disability, sex or age. The Standards of Conduct in this policy are designed to protect the well being and rights of all employees, to assure safe, efficient Town operations and to assure compliance with public law. The Standards listed in this policy are intended to be illustrative but not all-inclusive. Accordingly, an offense, which, in the judgment of the department head, although not listed in the policy, seriously undermines the effectiveness of the Town's activities or the employee's performance, should be treated consistent with the provisions of this policy.

Employees of the Town must:

- Perform assigned duties to the best of their ability at all times.
- Render prompt and courteous service to the public at all times.
- Read, understand, and comply with the rules and regulations as set forth in these Personnel Policies as well as those of their departments.
- Conduct themselves with decorum toward both residents and staff and respond to inquiries and information requests with patience and every possible courtesy.
- Report all unsafe conditions to the immediate supervisor.
- Develop skills and seek training that will enhance personal development.
- The effective operation of the Town requires that all public officials and the employees be independent, impartial, and responsible to the citizens.
- Decisions and policy will be made through the proper channels of our government.
- The employees of Lake Hamilton will maintain ethical conduct by setting forth actions that are compatible with the best interests of the Town.
- No employee shall grant special consideration, treatment or an advantage to a citizen, or employee, which is not available to any other citizen or employee.
- Employees are expected to maintain timely and regular attendance at work.
- Employees are expected to meet established performance standards. Conditions or circumstances, as they become known, which will prevent employees from performing effectively or from completing their assigned tasks should be reported to the department head.

7-2 Secondary Employment

Any employee seeking secondary employment shall discuss this with his/ her immediate supervisor and obtain approval prior to accepting a position outside of Town employment. It should be known that the employment with the Town is primary. In the event that the secondary employment interferes with the employee's performance, attendance or ability to do his/ her job, the employee may be asked to discontinue dual employment. Employees who have secondary employment at the time of hire must notify their immediate supervisor and the Town Administration of the employment.

The following is to be considered when determining if outside employment is acceptable:

- Outside employment must not interfere with a full-time employee's availability during the town's regular hours of operation or with a part-time employee's regular work schedule.
- Outside employment must not interfere with the employee's ability to fulfill the essential requirements of his/her position.
- The employee must not use town equipment, resources, or staff in the course of the outside employment.
- The employee must not violate any town personnel policies because of outside employment.
- The employee must not receive compensation from another individual or employer for services performed during hours for which he/she is also being compensated by the town. Work performed for others while on approved

vacation or compensatory time is not a violation of policy unless that work creates the appearance of a conflict of interest.

- No employee will work for another employer, or for his/her own business, while using paid sick leave from the town for those same hours.
- Departments may establish more specific policies as appropriate, subject to the approval of the Administrator.

Town employees are not permitted to accept outside employment that creates either the appearance of or the potential for a conflict with the development, administration or implementation of policies, programs, services, or any other operational aspect of the Town.

7-3 Conflict of Interest

No employee of the Town shall engage in any financial or other interest, which might affect the performance of his/her, duties. Employees shall not, without proper authorization, disclose confidential information concerning the Town of Lake Hamilton. Employees shall not accept any gift or favor from a citizen, corporation, or firm that is intended to influence his/her decision or discharge of his/her duties. Employees shall not represent private interests before the interests of the Town unless he/she is doing so as a member of a civic organization or is speaking on an issue of general public interest.

Town employees are to remove themselves from situations in which they would have to act or make a decision where that action or decision could be a perceived or actual conflict of interest. To avoid misunderstandings, which could arise in administering this section, the Town will refer to Chapter 112 of the Florida Statutes and seek guidance from other government agencies. If an employee has any question about whether such a conflict exists, he/she should consult with the Town Administrator.

7-4 Appearance

Departments may establish dress codes for employees as part of departmental rules. Personal appearance should be appropriate to the nature of the work and contacts with other people and should present a positive image to the public. Clothing, jewelry, or other items that could present a safety hazard are not acceptable in the workplace. The Town may authorize a uniform program or pay for town imprinted shirts for office staff. Personal appearance, cleanliness, and neatness are vitally important to one's job and relationships with others. Common sense and consideration for others must be exercised in matters of personal hygiene.

7-5 Attendance

The operations and standards of service in the Town of Lake Hamilton require that employees be at work when scheduled unless valid reasons warrant absence. For a team to function efficiently and effectively, employees must be on the job. Attendance is an essential function of every Town position.

Employees who are going to be absent from work are required to notify their supervisor as soon as possible in advance of the absence. In case of unexpected absence, employees should call their supervisor before the scheduled starting time. If the supervisor is not available at the time, the employee should leave a message that includes a telephone number where he/she can be reached and/or contact any other individual who was designated by the supervisor. Failure to use established reporting process will be grounds for disciplinary action. Departments may establish more specific reporting procedures.

The employee must call the supervisor on each day of an absence extending beyond one (1) day unless arrangements otherwise have been made with the supervisor. Employees who are absent for three (3) days or more and who do not report the absence in accordance with this policy, will be considered to have voluntarily resigned not in good standing. The Town may waive this rule if extenuating circumstances are found satisfactory to the Administrator. This policy does not preclude the Town from administering discipline for unexcused absences of less than three (3) days.

7-6 Use of Computer Systems, Internet, and Phones

Computer and networking systems, and all other Town resources and equipment are considered Town property. The use of these systems, networks and equipment is limited to business purposes only, except as specifically set forth below.

Infrequent and very limited use of Town telephones for brief local calls or short local faxes normally is permitted so long as it does not interfere with performance of your duties, is consistent with all other Town policies, is not disruptive to the Town and is not potentially disruptive or offensive to others. Use of all other Town resources, such as long-distance telephone service, postal and shipping service, copiers, long distance faxes, vehicles, equipment and/or office supplies

and materials for any non-business purposes is generally not permitted, and may only be used with prior management approval as set forth below.

Requests for use of computers and computer systems and networks for personal/professional development or continuing education reasons are permitted. Use of e-mail should generally be limited to work-related use, which includes the ability of employees to communicate among themselves regarding work related issues, including discussions of working conditions, compensation, benefits, and other activities as may be protected by the National Labor Relations Act.

7-7 Incidental Use

During or after normal working hours, employees may occasionally wish to access the Internet for non-work-related purposes, just as they might currently browse a newspaper or make occasional, short, non-work-related local telephone calls. Such infrequent and limited non-business use is permissible so long as no disruption to services.

7-8 Use of Licensed Software

The Town purchases and licenses the use of various computer software for business purposes and does not own the copyright to this software. Employees may only use software on our networks according to the software license agreement. Town policy prohibits the illegal duplication of software and its related documentation. The Town maintains and supports hardware, software and network services for business use. Employees should only use the software and hardware provided. Town policy prohibits the loading of files and software or the altering of software setup and configuration.

Some licenses allow for use of software by an individual on the computer in his or her office and on his or her home or portable computer, provided that only one copy of the software is in use at a time. However, not all vendors allow such copying. Employees should use the software only in accordance with the terms of the license agreement. Before you make a copy of software applications for use on a computer other than your primary work computer, check with the systems administrator.

Likewise, software that employees have licensed for use on their home computers may not be appropriate or authorized for use on their computers at work. Installing software not authorized by the Town on your work computer can cause system problems. "Shareware" or software acquired for use at home cannot be supported by the network systems administrator and could introduce viruses into the system. Use of non-authorized software on Town computers is prohibited and can lead to disruption of work.

Employees should notify their immediate supervisors or Town Administration upon learning of any violations of this policy. Employees who violate this policy will be subject to disciplinary action up to and including termination of employment.

7-9 Political Activity

Town employees have the right to express their views and to pursue legitimate involvement in the political system. However, no Town employee will directly or indirectly, during hours of employment, solicit or receive funds for political purposes. Further, any political activity in the workplace must be pre-approved by the Town to avoid any conflict of interest or perception of bias such as using authority or political influence to compel another employee to apply for or become a member in a political organization.

No employee, official or other person shall solicit, orally or by letter, or be in any other manner concerned in obtaining contributions or services for any political party from any employee during his/her hours of duty with the Town.

7-10 Falsification of Records

Any employee who makes false statements or commits, or attempts to commit, fraud to prevent the impartial application of these policies will be subject to immediate disciplinary action up to and including termination and potential criminal prosecution.

7-11 Access to and Use of Town Property

Any employee who has authorized possession of keys, tools, cell phones, or other Town-owned equipment must register his/her name and identifying information about the equipment with his/her supervisor. All such equipment must be turned in and accounted for by any employee leaving employment with the Town to resign in good standing.

Employees are responsible for the safekeeping and care of all such equipment. All accidents and injuries will be reported immediately to the employee supervisor or the Town Administrator. The duplication of keys owned by the Town is prohibited unless authorized by the Town Administrator. Any employee found having an unauthorized duplicate key would be subject to disciplinary action.

7-12 Personal Financial Responsibility

The Town believes its employees must be financially responsible for themselves and their families. At no time, will the Town make advance payments or a loan to any employee.

7-13 Personal Telephone Calls

Personal telephone calls are to be made or received only when truly necessary. They are not to interfere with Town work and are to be completed as quickly as possible. Personal long-distance calls are forbidden on the town phone. Please refer to the Cell Phone policy for information on use of town issued cellular phones.

7-14 Cellular Phone Use

This policy is intended to define acceptable and unacceptable uses of town issues cellular telephones. Its application is to ensure that cellular phone usage is consistent with the best interests of the Town without unnecessary restriction of employees in the conduct of their duties. This policy will be implemented to prevent the improper use or abuse of cellular phones and to ensure that Town employees exercise the highest standards of propriety in their use.

General Policy

Cellular telephones are intended for the use of Town employees in the conduct of their work for the Town. Supervisors are responsible for the cellular telephones assigned to their employees and will exercise discretion in their use. Nothing in this policy will limit supervisor discretion to allow reasonable and prudent personal use of such telephones or equipment provided that:

- Its use in no way limits the conduct of work of the employee or other employees.
- No personal profit is gained, or outside employment is served.

Supervisors may prohibit employees from carrying their own personal cell phones during working hours if it interferes with the performance of their job duties.

Use of public resources by Town employees for personal gain and/or private use including, but not limited to, outside employment or political campaign purposes, is prohibited and subject to disciplinary action which may include termination and/or criminal prosecution, depending on the circumstances. Incidental and occasional personal use may be permitted with the consent of the supervisor.

Procedures

It is the objective of the Town of Lake Hamilton to prevent and correct any abuse or misuse of cellular telephones through the application of this policy. Employees who abuse or misuse such telephones may be subject to disciplinary action.

Responsibility

The Town Administrator will have primary responsibility for implementation and coordination of this policy. All supervisors will be responsible for enforcement within their departments.

Internet and Other Applications

To the extent cellular telephones may be used to access the internet or other applications, the use of such cellular telephone is governed by the policies for computer and internet use, and use of licensed software, as provided in Sections 7-6, 7-7, and 7-8.

7-15 Town Owned Vehicles

Town employees are responsible for the proper use and maintenance of town owned vehicles used in their work. Any defects noted by the employee should be reported to the immediate supervisor as soon as possible. Town owned vehicles will be parked as determined by town administration and vehicles are to be used for Town business only. Persons who are not employees of the Town are not authorized to ride in these vehicles unless prior permission is received from the Town Administrator. Only town employees are authorized to drive town vehicles.

This policy applies to all employees who drive a vehicle on Town business at least once per month, whether driving a Town-owned vehicle or their own personal vehicle. It also applies to employees who drive less frequently but whose ability to drive is essential to their job due to the emergency nature of the job. The Town expects all employees who are required to drive as part of their job to drive safely and legally while on Town business and to maintain a good driving record.

The Town will examine driving records once per year for all employees who are covered by this policy to determine compliance with this policy. Employees who lose their driver's license or receive restrictions on their license are required to notify their immediate supervisor on the first workday after any temporary, pending, or permanent action is taken on their license and to keep their supervisor informed of any changes thereafter.

The Town will determine appropriate action on a case-by-case basis.

7-16 Accidents

Employees involved in any accident while driving a Town owned motor vehicle or driving a personal vehicle while working for the Town must:

- (a) Immediately, call 911 for first aid assistance if it is necessary.
- (b) Notify law enforcement agency.
- (c) Obtain the names and addresses of the other person(s) involved in the accident.
- (d) Obtain the names and addresses of all witnesses present.
- (e) As soon as possible, notify their Department Head of the accident. It is the Department Head's responsibility to notify Town Administration of the accident.

7-17 Harassment

The Town's support of its Equal Employment Opportunity policy includes its commitment to prohibit harassment against employees because of sex, gender, race, color, religion, national origin, age, military or veteran status, disability or any other class protected by law. This prohibition covers illegal harassment by anyone in the workplace including supervisors, co-workers and even non-employees. Our employees have the right to be free from inappropriate comments, unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature, or based on a person's protected class, when submission to or rejection of this conduct explicitly or implicitly affects an individual's employment, unreasonably interferes with an individual's work performance, or when such conduct creates an intimidating, hostile or offensive work environment. The Town also prohibits retaliation against any employee for opposing discrimination or harassment in the workplace. We expect our employees to treat each other with respect and courtesy. The Town will not tolerate discrimination, harassment, or retaliation.

Procedure

The following procedure applies to any harassment complaint.

- a. Any employee who feels he/ she has been discriminated against or harassed because of his/ her sex, gender, race or for any other improper reason, including retaliation for opposing harassment or discrimination, should report the matter immediately to his or her immediate supervisor or Town Administrator.
- b. The employee can inform any of these persons of the complaint. If the employee prefers not to report it to his or her supervisor, the employee should report it to the Town Administrator.
- c. Employees should not assume that the Town management knows about the situation. Please inform your supervisor and the Town Administrator promptly of your problem so that it may be addressed. Employees should report the situation before it becomes severe or pervasive.
- d. Such reports or complaints can be made without fear of retaliation.
- e. Once on notice of complaint, the Town will investigate it in a prompt, thorough and impartial manner. The Town will ensure as much confidentiality as is possible. The Town will not retaliate against anyone who provides information during the Town's investigation.
- f. The Town will take immediate and appropriate corrective action if it finds any violation of this policy. Such action may include the suspension or discharge of the offender.

If you have any questions regarding this policy, or need information on complaint procedures, we urge you to contact the Town Administrative Office.

7-18 Drug Free Workplace

Lake Hamilton has long been committed to a safe and healthful working environment for its employees. Additionally, we have an obligation to the public to conduct our operations safely and efficiently. With this commitment and obligation in mind, the Town is reaffirming its rules prohibiting alcohol and drug abuse. The Town is also reaffirming its willingness to assist employees with alcohol or drug related problems to find the appropriate treatment for rehabilitation and recovery.

In accordance with our long-standing policy, this notice is to reemphasize to our employees that the abuse of drugs and alcohol poses a serious threat to the safety of our employees and the Town's operations and to the public. Accordingly, the use, possession, being under the influence or having a detectable presence of drugs or alcohol in one's system (except where expressly authorized) or manufacture, distribution or sale of such substances on Town premises or on-the-job or any off-the-job abuse of such substances which adversely affects an employee's job performance or other Town interests is prohibited. Drug and alcohol include any substance with the potential to produce effects of intoxication and/or the potential to produce physical, mental, emotional or behavioral changes which could adversely affect an employee's ability to safely and efficiently perform his/her job and specifically include marijuana, cocaine, amphetamines, barbiturates, heroin, opium and phencyclidine. This prohibition includes any prescription or over-the counter drug unless an employee's possession and use of such drug on Town premises, or on-the-job, has been expressly approved by the Town. The term Town premises in this notice is used in its broadest sense, and includes all land, property, buildings, structures, cars, trucks, and all other means of conveyance owned or leased by the Town, or otherwise being utilized for Town business. The term on-the-job includes paid and unpaid meal periods during the business day and paid and unpaid overtime.

Employees who have drug and/or alcohol abuse problems are encouraged to request assistance through the Town's employee-assistance program or through community agencies. The Town will take no disciplinary action against employees who voluntarily seek such assistance. The existence of, or employee participation in, an employee assistance program does not, however, relieve any employees from compliance with the terms of this notice or other applicable standards governing performance and conduct. Employees who violate this Drug and Alcohol-Free Workplace Policy will be subject to disciplinary action up to and including discharge and may be allowed to participate in EAP approved treatment as an alternative to discharge.

To further insure safe and healthy working conditions, the Town may request an employee to participate in drug or alcohol testing for justifiable reasons. The Town also reserves the right to take other justifiable measures including the inspection of all Town premises and the personal property of employees on Town premises in order to ensure compliance with this policy. Participation in such testing and inspection is voluntary, but employees who refuse shall be deemed in violation of this Policy and subject to termination of employment.

All records and information obtained by the Town regarding alcohol and drug testing and the results and treatment of employees for chemical dependency will be confidentially maintained by restricting access on a need-to-know basis to those designated by management.

Your cooperation in the enforcement of this policy will assist the Town in providing your and your fellow employees with a healthy and safe work environment.

In accordance with Federal Law, the Town of Lake Hamilton has adopted the following policy on drugs in the workplace:

- A. Employees are expected and required to report to work on time and in appropriate mental and physical condition. It is the Town's intent and obligation to provide a drug-free, safe, and secure work environment.
- B. The unlawful manufacture distribution, possession, or use of a controlled substance on Town property or while conducting Town business is absolutely prohibited. Violations of this policy will result in disciplinary action, up to and including termination, and may have legal consequences.
- C. The Town recognizes drug abuse as a potential health, safety, and security problem. Employees needing help in dealing with such problems are encouraged to use their health insurance plans, as appropriate.
- D. Employees must, as a condition of employment, abide by the terms of this policy and must report any conviction under a criminal drug statute for violations occurring on or off work premises while conducting Town business. A report of the conviction must be made within five (5) days after the conviction as required by the Drug-Free Workplace Act of 1988.

7-19 Inspection

Inspections and searches conducted under this policy shall be for determining adherence to Town policy, fitness for duty and appropriate discipline. Law enforcement personnel investigating criminal activity may conduct inspections or searches pursuant to this policy as approved by the Town Administrator.

The Town reserves the right to search Town owned property, including vehicles, structures, buildings, equipment, computer and other electronic communication systems, furniture, offices, desks, lockers, files, file cabinets and containers at any time and for any reason. All Town employees are therefore strongly encouraged to refrain from storing on or in Town owned property any personal article (including personal correspondence) they wish to protect from inspection by Town officials.

7-20 Workplace Violence

The Town is strongly opposed to acts of aggression, violence, or threats in the workplace. This includes, but is not limited to, intimidating, threatening or hostile behaviors, physical abuse, vandalism, threats, arson, sabotage, and use or display of weapons. In addition, jokes or offensive comments regarding violent events will not be tolerated and may result in disciplinary action.

The purpose of this policy is to minimize the risk of injury to employees and others at work and damage to Town property. It is our belief that through the steps outlined below we can identify stresses in the workplace early on and develop a risk-reducing violence prevention program. It is important that you become familiar with the provisions of this policy.

We wish to stress that the Town does not expect you to become an expert in psychology or to physically subdue a threatening or violent individual. In fact, we discourage employees from engaging in a physical confrontation with a potentially violent individual. However, we do expect that you exercise reasonable judgment in identifying potentially dangerous situations.

It is essential that all employees recognize that before any physical acts of violence occur, there often are behaviors exhibited by individuals engaging in such acts. Such behaviors include:

- *Co-workers or others not employed by the Town display overt resentment, anger, and hostility.*
- *Co-workers or others not employed by the Town make ominous threats like bad things are going to happen to a particular person or a catastrophic event might occur.*
- *Co-workers whose work performance has deteriorated suddenly and/or significantly.*
- *Co-workers or others not employed by the Town who display irresponsible, irrational or inappropriate behavior.*
- *Co-workers who have access to weapons, know how to use them, discuss them in the workplace in such a manner as to intimidate or threaten, and/or brandish weapons in the workplace.*

7-21 Prohibited Conduct

Threats, threatening language, or any other acts of aggression or violence made toward or by any Town employees WILL NOT BE TOLERATED. For purposes of this policy, a threat includes any attempts to intimidate or instill fear in others, menacing gestures, flashing of concealed weapons, stalking, verbal or physical abuse, or other hostile, aggressive, injurious, and destructive actions undertaken for the purpose of domination or intimidation, where one may fear bodily injury.

All Town employees are prohibited from possessing a weapon while in the course and scope of performing their job for the Town, whether they are on Town property at the time and whether or not they are licensed to carry a handgun. Employees may not carry a weapon while performing any task on the Town's behalf. This policy also prohibits weapons at any Town sponsored function. This policy further prohibits employees from having any firearms in a personal vehicle on Town property and in a Town vehicle at any time or place.

This policy applies to all Town employees (except for law enforcement officers), contract and temporary employees, visitors, customers and contractors on Town property, regardless of whether or not they are licensed to carry a concealed weapon. The only exceptions to this policy are law enforcement and other persons who have been given written consent by the Town to carry a weapon on the property.

Prohibited weapons include any form of weapon or explosive restricted under local, state, or federal regulation. This includes all firearms, illegal knives or other weapons covered by the law. (Legal, chemical-dispensing devices such as

pepper sprays that are sold commercially for personal protection are not covered by this policy). If you have a question about whether an item is covered by this policy, contact the Town's Police Department. You are responsible for making sure that any potentially covered item you possess is not prohibited by this policy.

Town property covered by this policy includes, without limitation, all Town owned or leased building and surrounding areas such as sidewalks, walkways, driveways, and parking lots. Town vehicles are covered by this policy at all times regardless of whether or not they are located on Town property.

The Town reserves the right to conduct searches and inspections of employee's personal effects or Town provided materials in situations meeting the definition of "reasonable-cause" and when two supervisors agree on the "reasonable-cause" decision. Illegal and/or unauthorized articles discovered, or articles deemed to be dangerous weapons may be taken into custody and may be turned over to law enforcement representatives, as appropriate. Any employee who refuses to submit to a search, or who is found in possession of prohibited or dangerous articles, will be subject to disciplinary action up to and including termination.

To the extent required by Florida Statutes Section 790.251, this policy does not prohibit an employee from lawful possession of a legally owned firearm locked inside the employee's personal (not Town owned) vehicle.

7-22 Threat Reporting Procedures

All potentially dangerous situations including threats should be reported immediately to a supervisor. All threats will be investigated. The key is to report any incident involving conduct prohibited by this policy.

Employees who feel they have been subjected to any of the behaviors listed are required to immediately report the incident to a supervisor. Complaints will be treated seriously and will be investigated. Based upon findings, disciplinary action may be taken against the offender.

Employees who observe or have knowledge of any violation of this policy should immediately report it to management. We will take appropriate action and look to employees for support of this policy. Employees are empowered to contact the proper law enforcement authorities without first advising Town Administration Office (or simultaneously with informing above mentioned) if they believe an immediate safety threat exists.

7-23 Domestic Violence

To create a safe, productive workplace, Town of Lake Hamilton is committed to providing information, resources and support for employees and management who are responding to domestic violence concerns. The Town treats all employees fairly and will not discriminate against an employee in any employment actions because the employee is, or perceived to be, a victim of domestic violence.

To enable employees to seek assistance for domestic violence needs, it is encouraged that management respond to employees who are victims of domestic violence in an open-minded manner. Respecting the employees need for confidentiality whenever possible, we reserve the right to disclose limited information and take action when it is clearly necessary to protect the safety of Lake Hamilton employees.

Domestic Violence Education and Training

The Town of Lake Hamilton believes that offering employees opportunities to increase their awareness of domestic violence helps to prevent and reduce the impact of domestic violence in the lives of our staff. The Town may provide workplace educational and informational resources for employees whenever feasible.

7-24 Safety and Security

The Town of Lake Hamilton will not tolerate any acts of threat or domestic violence against any employee while on Town property or while conducting Town business. Employees who threaten, harass, or abuse any one either at the workplace or from the workplace, may be subject to disciplinary action, up to and including termination.

Employees who become aware of threats or acts of domestic violence that may occur or have occurred in the workplace must immediately inform their supervisor. In addition, employees with Orders of Protection or restraining orders that reference the worksite must provide their supervisor with a copy of the order.

7-25 Employees Who Commit Acts of Domestic Violence

An employee who is found guilty of committing an act of domestic violence in the workplace may be subject to disciplinary action, up to and including termination. Further, if an employee is found using any Town resources such as work time, workplace phones, fax machines, mail, electronic mail, or any other means to commit an act of domestic violence may be subject to disciplinary action, up to and including termination.

7-26 Employee Health and Safety

The health and safety of each employee of the Town and the prevention of occupational injuries and illnesses are of primary importance to the Town. To the greatest degree possible, management will maintain an environment free from unnecessary hazards and will establish safety policies and procedures for each department. Adherence to these policies is the responsibility of each employee. Overall administration of this policy is the responsibility of each supervisor. Any employee who becomes aware of an unsafe condition should immediately bring the issue to the attention of the supervisor or the Town Administrator.

Safety Equipment/Gear

Where safety equipment is required by federal, state, or local rules and regulations, it is a condition of employment that the employee wears such equipment.

Unsafe Behavior

Supervisors are authorized to send an employee home immediately when the employee's behavior violates the Town's personnel policies, department policies, or creates a potential health or safety issue for the employee or others.

7-27 Reporting Accidents and Illnesses

Both Florida Worker's Compensation laws and the state and Federal Occupational Safety and Health Acts require that all on the job injuries and illnesses be reported as soon as possible by the employee, or on behalf of the injured or ill employee, to his/her supervisor. The employee's immediate supervisor is required to complete a First Report of Injury and any other forms that may be necessary related to an injury or illness on the job.

CHAPTER 8

DISCIPLINE PROCEDURES

8-1 General Policy

The Town Administrator and Department Supervisors are responsible for maintaining compliance with Town standards of employee conduct. The objective of this policy is to establish a standard disciplinary process for employees of the Town of Lake Hamilton. Town employees will be subject to disciplinary action for failure to fulfill their duties and responsibilities at the level required, including observance of work rules and standards of conduct and applicable Town policies.

Discipline will be administered in a non-discriminatory manner. An employee who believes that discipline applied was either unjust or disproportionate to the offense committed may pursue a remedy through the grievance procedures established in the Town's personnel policies. The supervisor and/or the Town Administrator will investigate any allegation on which disciplinary action might be based before any disciplinary action is taken.

8-2 No Contract Language Established

This policy is not to be construed as contractual terms and is intended to serve only as a guide for employment discipline.

8-3 Discipline

It is the policy of the Town that all employees are expected to comply with the Town's standards of behavior as set forth in these policies. Any noncompliance with these standards must be remedied and can be subject to one or more disciplinary actions. The supervisor shall consider the severity of the non-compliance and shall utilize the disciplinary action available in a progressive manner.

8-4 Discipline Policy

Basis for Discipline - Management is responsible for investigating and evaluating allegations of employee misconduct or work deficiency. Any decision to take disciplinary action shall be based on a complete review of all available, relevant facts. Management shall also consider an employee's record and years of service.

Type of Discipline - Discipline, in increasing order of severity, shall be limited to oral reprimand (including documented oral reprimands), written reprimand, suspension without pay, demotion, and discharge. In addition, employees may be required to make restitution for losses resulting from their actions or omission.

Corrective/Progressive Discipline - Management will generally follow a policy of corrective and progressive discipline by which less severe forms of discipline are imposed prior to resorting to the imposition of more severe sanctions for the same or similar conduct by the employee. *Management, however, reserves the right to impose even the most severe discipline as an initial measure when circumstances warrant.*

Time Limit for Taking Discipline - Discipline shall usually be initiated within 10 working days of the date of the alleged infraction and/or within 10 working days of the date Management learns of the alleged infraction. Additional time may be necessary depending on the length of any investigation that may be undertaken. Where an alleged infraction of federal, State or local laws are involved, there shall be no time limit for Management to initiate appropriate disciplinary action.

FLSA Exempt Employees - The discipline of FLSA Exempt Employees shall be imposed in such a manner, as not to compromise or threaten their "exempt" status under the FLSA, notwithstanding anything to the contrary contained in this policy. By virtue of the authority vested in them, Department Heads and other management-level employees, are expected to be the models for subordinate personnel. Therefore, they are subject to corrective disciplinary action as determined by the Town Administrator and are not limited to the prescribed progressive methods as outlined within this procedure.

8-5 Progressive Discipline

In general, the Town follows a progressive discipline approach. This will give most employees an opportunity to correct the problem before more serious disciplinary actions are taken. In addition to the process outlined below, alternate

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strategies such as performance improvement plans, mediation, conflict resolution and demotions may be used on a case-by-case basis. These actions are to be utilized when it serves the Town's best interest to resolve the problem in the least negative and most cost-effective manner.

In the event it becomes necessary to take disciplinary action against an employee, the supervisor shall have the following guidelines available:

a. Oral- Meet with and advise the employee of the nature of the problem and the action necessary to correct the situation. This action may be considered informative in nature and usually will not result in any entry in the employee's personnel file; however, the Supervisor should document the conversation for reference.

b. Written - A written reprimand is more serious and may follow an oral reprimand when the problem is not corrected, or the behavior has not consistently improved in a reasonable period of time. Serious infractions may require skipping either the oral or written reprimand, or both. Written reprimands that are issued by a supervisor must get prior approval from the Town Administrator.

A written reprimand will: (1) state what did happen; (2) state what should have happened; (3) identify the policy, directive or performance expectation that was not followed; (4) provide history, if any, on the issue; (5) state goals, including timetables, and expectations for the future; and (6) indicate consequences of recurrence. Employees will be given a copy of the reprimand to sign acknowledging its receipt. Employees' signature does not mean that they agree with the reprimand. Written reprimands will be placed in the employee's personnel file.

c. Suspension with or Without Pay - The Town Administrator may place the employee on leave with or without pay pending completion of any investigation, court action or other such matter that is deemed serious enough to warrant suspension. Employees suspended from work will not accrue or receive any employee benefits during their suspensions. Suspension shall not exceed thirty (30) working days. Suspension without pay may be followed with immediate dismissal. The employee will be notified in writing of the reason for the suspension either prior to the suspension or shortly thereafter. A copy of the letter of suspension will be placed in the employee's personnel file.

If the allegation is proven false after the investigation, the relevant written documents will be removed from the employee's personnel file and the employee will receive any compensation and benefits due had the suspension not taken place.

d. Demotion and/or Transfer - An employee may be demoted or transferred if an attempt at resolving an issue have failed and the Administrator determines a demotion or transfer to be the best solution to the problem. The employee must be qualified for the position to which they are being demoted or transferred.

e. Termination- Terminate the employee from his/ her employment. This should be a last resort when serious misconduct remains uncorrected or when initial misconduct is so significant that the employment must be terminated. In the event a supervisor recommends dismissal, a complete review will be made by the Town Administrator of the facts surrounding the request. If dismissal is warranted, the employee will be given a final notification form and an opportunity to respond.

8-6 Resignation with Pending Charges to Terminate

An employee who wishes to resign during the termination process may do so by submitting a letter of resignation to the department head. If the letter of resignation is accepted in lieu of termination, the appropriate documentation will be placed in the employee's personnel file.

8-7 Appeal

Employees who believe they have been improperly disciplined may use the grievance procedures set forth herein to have their views considered. **(See Chapter 9)**

8-8 List of Less Minor Infractions

Listed below are some of the infractions, which are typically addressed through progressive discipline, however disciplinary action is not limited to the offenses listed. Please note that the Town Administrator reserves the right to determine how serious the offense and what course of action will be taken.

- Failure to attend scheduled meetings or training sessions.
- Incompetence or continued rendering of unsatisfactory service after instruction and/or counseling.
- Absence without leave, or failure to give proper notice of absence.
- Failure to return to work at the end of an authorized absence.
- Excessive unauthorized tardiness or absence from work
- Inducing or attempting to induce an employee of the Town to commit an unlawful Act
- Using, threatening, or attempting to use inappropriate personal influence in securing promotion, leave of absence, transfer, change in pay, change in character of work, or a change in any other term or condition of employment
- Taking a fee, gift, or other valuable thing in the course of work or in connection with work, when the fee, gift, or other valuable thing can reasonably be assumed to be offered with the intent or expectation of receiving a favor or better treatment than that accorded other persons.
 - a. [NOTE: The payment of less than \$25 for a meal consumed in the course of business is not included in this prohibition.]
- Unauthorized use of Town personnel services, supplies, property, facilities, or equipment.
- Engaging in excessive personal activities unrelated to Town employment during working hours.
- Violation of Town policies and procedures, Department, or work unit rules, or applicable Federal, State or local laws and regulations governing public employees.
- Insulting, inflammatory, or abusive language or conduct toward other Town employees or toward members of the public during working hours.
- Sleeping while on duty without authorization.
- Engaging in a strike prohibited by Section 447.505 of the Florida Statutes.
- Conducting in political activities while on duty and/or use town property and equipment for such activity.
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- Failure to maintain competence, qualifications, or legal capacity to perform the duties of the employee's position.
- Utilization of official position for unauthorized personal gain.
- Actions or conduct detrimental to the interests of the Town.
- Off-duty misconduct that adversely affects the employee's job performance, adversely affects the job performance of fellow workers, or that is detrimental to the reputation of the Town or its workforce.
- Conviction of a moving traffic violation while using a Town-owned vehicle.
- Any other properly substantiated cause which adversely affects the Town of Lake Hamilton.

8-9 List of Serious Infractions

Listed below are some of the infractions, which are typically addressed through more serious discipline, however disciplinary action is not limited to these offenses listed.

- Neglect of duty or specific serious failure to perform assigned duties.
- Inability to perform the essential functions of a position even with reasonable accommodation.
- Insubordination. (*Immediate grounds for Discharge*).
- Use of, or other prohibited activity regarding, alcoholic beverages or controlled substances on duty.
- Impairment, to any degree, of an employee's ability to effectively perform their job duties due to the use of alcoholic beverages or unauthorized controlled substances.
- Possession of alcoholic beverages or unauthorized controlled substances on Town property during working hours.
- Conviction, or entry of a plea of guilty or plea of no contest of a felony. (*Immediate grounds for Discharge*)
- Conviction, or entry of a plea of guilty of a misdemeanor charge related to the employee's job duties.

- Discrimination against any person in recruitment, examination, appointment, training, promotion, retention, or any other employment matter because of sex, color, age, marital status, handicap, physical or mental impairment, race, national origin, citizenship status, or any other non-performance factor.
- Ethnic, racial, religious, sexual, or other harassment directed toward any person.
- Negligent or willful damage to, or loss of, town property
- Theft, conversion of, or willful or careless waste of, Town supplies, property, or equipment
- Unauthorized possession of firearms, explosives, or other weapons in violation of these Employment Rules;
- Falsification of any document related to employment, including, but not limited to, the employee's application for employment and/or promotion, the employee's time sheets, or any other official document(s) of the Town.
- Fighting, horseplay, unsafe conduct, or misconduct while on duty or on town property during working hours.
- Harassment, bullying or cruelty to another Town employee or member of the public, provided that the act was not lawfully or necessarily committed in self-defense or to protect the lives of others.
- Refusal or failure to fully and truthfully cooperate in any investigation related to Town business and conducted by or at the direction of the Town Administrator, Police Department, Town Attorney, or Department Head.
- Failure or refusal to perform tasks properly assigned by a person in authority.

CHAPTER 9

GRIEVANCE PROCEDURES –GENERAL

Disciplinary Review Board

9-1 PURPOSE

To ensure alleged violations of federal and state laws or personnel policies and procedures are investigated in order to protect all parties.

9-2 AUTHORITY

Town Administrator

9-3 APPLICABILITY

The grievance process described here in this Chapter 9 is limited to non-probationary employees. Probationary Employees may not appeal or grieve any disciplinary action that may be imposed.

Law Enforcement Officer - Non-probationary employees who are entitled to the protections and procedures as defined in the Law Enforcement Officers Bill of Rights, Florida Statute 112.531(1) are excluded from this policy. The investigation of alleged violations of federal, State laws or Town Policies and Procedures shall be conducted in accordance with the Law Enforcement Officers Bill of Rights, Florida Statute 112.531(1).

9-4 POLICY

The Town Administrator may establish two (2) impartial internal members Disciplinary Review Board. The Disciplinary Review Board shall consist of two employees of the Town, with the assistance of the Town Attorney if necessary. The department head initiating the disciplinary action shall not be included on the board but shall be available to provide testimony during the investigative process.

The Disciplinary Review Board may investigate all alleged violations of laws or personnel policies and procedures by any employee for the Town of Lake Hamilton, of a serious nature that may result in suspension, demotion and/or termination. Written or oral reprimands may not be appealed or grieved.

The Disciplinary Review Board shall investigate and hear testimony to resolve the situation as quickly and accurately as possible. This board reserves the right to use any lawful method of investigation that, at its sole discretion, it deems reasonable and necessary to determine whether any employee has engaged in conduct warranting such disciplinary action.

Failure to cooperate with an investigation, or failure to abide by the rule of confidentiality, will be grounds for disciplinary action. Retaliation against employees for reporting misconduct, violent behavior or not assisting in the investigation of a complaint is prohibited and will be grounds for disciplinary action. Except for people with authorized access to the investigation – Keeps all information that is shared during the investigation completely confidential and does not discuss the investigation under any circumstances.

[NOTE: Once an investigation is closed, the documents become public record, pursuant to Chapter 119, of the Florida Statutes.]

9-5 PROCEDURES**Management:**

1. Understands that all employees are entitled to procedural and substantive due process prior to the imposition of suspension, demotion and/or termination for cause from employment
2. When suspension, demotion and/or discharge for cause is contemplated - Provide the employee with written notice of the intended disciplinary action.

[NOTE: This written notice shall be hand-delivered or mailed by regular U.S. mail to the employee at his/her address currently on file with the Clerk's Office.]

3. Includes in the written notice:
 - The anticipated effective date of the proposed disciplinary action.
 - The specific charges or reasons for the proposed disciplinary action.
 - A statement advising the employee that within three (3) working days of receipt of the notice, they may submit a request in writing for a pre-disposition conference to refute or explain the charges made against them to the Disciplinary Review Board.
 - A statement advising that if the employee requests a pre-disposition conference, no disciplinary action will take effect until after the board completes the investigation and recommendation has been submitted to the Town Administrator.
 - Identifies a time and place and holds the pre-determination conference by the Disciplinary Review Board.
 - During the pre-determination conference – (Disciplinary Review Board). Explains that the purpose of the conference is to (a) hear the employee's position concerning the proposed discipline, and (b) to provide an opportunity to reevaluate the situation after reviewing the information presented by the employee.

Employee:

4. May bring an attorney or other representative at the employee's own expense to assist or advise.

Disciplinary Review Board:

5. Invites employee to provide information and evidence relevant to the employee's position and advises employee that a choice to make no response will result in management proceeding based on the best information it can obtain without such response.

Employee:

6. May submit relevant information, orally or in writing, or both.

Disciplinary Review Board:

7. At the conclusion of the Disciplinary Review Board Investigation - The Board shall submit report to the Town Administrator.

Town Administrator:

8. The Town Administrator shall be provided a final written report by Disciplinary Review Board of findings and recommendations. The Town Administrator shall consider all information presented by the Disciplinary Review Board from the pre-determination conference and its recommendations to either: (a) rescind or lessen the discipline first intended, (b) proceed as originally determined, or (c) take such other action as the full record indicates to be warranted and in the best interest of the Town.

[NOTE 1: If the decision is to impose disciplinary action, then the disciplinary action to be imposed must be embodied in a Final Notice of Disciplinary Action, which will be hand delivered or mailed by regular U.S. mail to the employee.]

[NOTE 2: The Final Notice of Disciplinary Action shall state: (a) the discipline to be imposed, (b) the effective date(s) of such discipline, and (c) the reasons for the disciplinary action.

The Town Administrator's decision is final on all disciplinary action.

CHAPTER 10

Grievance Procedures – Discrimination

10-1 Discrimination Grievances

Any applicant or employee of the Town of Lake Hamilton or the applicants and employees of its contractors, who believes she or he has been subjected to discrimination on account of race, color, familial status, national origin, sex, age, religion, disability, or or military or veteran's status, may file a grievance under this procedure. It is against the law for the Town of Lake Hamilton to retaliate against anyone who files a grievance or cooperates in the investigation of a grievance.

10-2 Procedure:

1. Grievances must first be submitted to the Supervisor or Town Administrator within 15 days of the date the person filing the grievance becomes aware of the alleged discriminatory action.
2. A complaint must be in writing, containing the name and address of the person filing it. The complaint must state the problem or action alleged to be discriminatory and the remedy or relief sought.
3. The Administrator, or a person selected by the Administrator, shall conduct an investigation of the complaint. This investigation may be informal, but it must be thorough, affording all interested persons an opportunity to submit evidence relevant to the complaint. The Supervisor will open and maintain a record of the Town relating to the grievance.
4. The Supervisor will issue a written decision on the grievance no later than 20 days after its filing.
5. The person filing the grievance may appeal the decision of the Supervisor in writing to the Town Administrator, within 15 days of receiving the Supervisor's decision, who shall deliver the file of the grievance to the Town Administrator.
6. The Town Administrator shall review the file and the decision of the Supervisor and interview all interested persons who have submitted evidence on the grievance. The Town Administrator shall issue a written decision in response to the appeal no later than 30 days after its filing.
7. The Town Administrator may interview all interested persons who have submitted evidence on the grievance and shall issue a written final decision in response to the appeal no later than 30 days after its filing.

The availability and use of this grievance procedure does not prevent a person from filing a complaint of discrimination with the U. S. Department of Housing and Urban Development or the Equal Employment Opportunity Commission.

The Town of Lake Hamilton will make appropriate arrangements to ensure that disabled persons are provided other accommodations if needed to participate in this grievance process. Such arrangements may include, but are not limited to, providing interpreters for the deaf, providing taped cassettes of material for the blind, or assuring a barrier-free location for the proceedings. The Town Clerk will be responsible for such arrangements.

CHAPTER 11

SEPARATION FROM SERVICE

11-1 Separation of Employment

The termination of an employee's service in the Town of Lake Hamilton may be the choice of the employee to either resign or retire, or the choice of the Town to reduce the work force or to dismiss the individual. Whatever the reason for the separation, this final employee action that closes the entire personnel files must be documented. An exit interview will be held between the exiting employee and Town Administrator. This interview is encouraged in all voluntary terminations and retirement. During the exit interview, the employee may discuss reasons for leaving and the status of benefits and compensation. This is not intended as a counseling or grievance session.

11-2 Severance Pay

Employees who leave the employ of the Town in good standing by retirement or resignation will receive pay for unused accrued vacation and sick leave per the policies indicated below:

1. Separation - Employment (Vacation Leave) - Accrued and available vacation leave hours, not used will be paid to the employee following separation of employment at the current hourly base rate of pay.

[NOTE: Employees, who leaves Town employment voluntarily, before the end of the probation period, will receive pay for any accrued vacation leave.]

2. Separation - Employment (Sick Leave) - In the event of separation from employment (In good Standing) from Lake Hamilton after 40 ¹ consecutive years of full-time service, an employee shall receive a fifty (50%) percent payment for unused sick leave credited to their account not to exceed 300 hours. This payout shall be at 50% of the employee's rate of pay as of the date of separation from service.

[Example: An eleven (11) year employee leaves town employment with 572 unused credited sick leave hours, their payout shall be at 50% of the employee's rate of pay x 300 Hours.]

3. Employee Terminated from Employment - Employee who is terminated for cause by the Town shall not be entitled to any payout of unused vacation or sick leave.

11-3 Resignations

Employees wishing to leave the Town service in good standing must provide a written resignation notice to their supervisor, at least ten (10) working days before leaving. Exempt employees must give thirty (30) calendar days' notice. The written resignation must state the effective date of the employee's resignation. Failure to comply with this procedure may be cause for denying the employee's separation pay and any future employment with the Town.

11-4 Dismissal

The Town Administrator may dismiss an employee for acts involving unsatisfactory performance or acts or conduct prejudicial to the public interest.

1. Acts involving unsatisfactory performance include: failure to perform the duties of the position because of inadequate knowledge, skills, or abilities; in supervisory position, inability to plan, organize, direct and supervise the work of subordinates; failure to perform the duties because of physical, emotional, or mental incapacity; repeated tardiness; recurring credit problems; unauthorized absence from duty for more than one day; abuse of sick leave; failure to maintain a satisfactory working relationship with other employees or the public; failure to observe Town regulations of any type; insubordination; refusing to comply with the proper orders of an authorized supervisor; acts or conduct detrimental to the good of the Town.

2. Acts or conduct prejudicial to the public interest include: theft, destruction, or gross neglect in the use of Town property; being under the influence of alcohol; disgraceful conduct while on duty; discourtesy to the public; acceptance of a gift of valuable consideration given with the intent of influencing the employee in the performance of their duties; use of official position or authority for personal profit or advantage; betraying confidential information from privileged official records; falsification of records, including application papers for town employment conviction of a felony or misdemeanor involving moral turpitude; any other offense against the public interest.

3. Charges, which will form the basis for a dismissal of an employee by the Administrator, shall be specific and shall be documented showing dates, places and incidents.

REMOVE THIS ENTIRE SECTION

Appendix A

Section 4-4 Classifications

Employee Classification Plan

Class Code	Position	Status	Minimum	Hourly	Salary Range	
					Maximum	Hourly
ADMINISTRATION						
1001	Administrator / Town Clerk	Exempt	\$ 45,000	N/A	\$ 65,000	N/A
1002	Deputy Town Clerk	Exempt	\$ 28,000	N/A	\$ 40,000	N/A
1004	Office Clerk	Non-Exempt	\$ 22,000	\$10.58	\$ 30,000	\$14.42
PUBLIC WORKS DEPARTMENT						
2001	Public Works Director	Non-Exempt	\$ 40,000	\$19.23	\$ 60,000	\$28.85
2002	Water Plant Operator	Non-Exempt	\$ 34,000	\$16.35	\$ 46,000	\$22.12
2005	Public Works Maintenance Employees	Non-Exempt	\$ 22,000	\$10.58	\$ 32,000	\$15.38
POLICE DEPARTMENT						
3001	Police Chief	Non-Exempt	\$ 40,000	\$19.23	\$ 60,000	\$28.85
3002	Police Lieutenant	Non-Exempt	\$ 35,000	\$16.83	\$ 48,000	\$23.08
3002	Police Sergeant	Non-Exempt	\$ 32,000	\$15.38	\$ 44,000	\$21.15
3003	Police Officers	Non-Exempt	\$ 30,000	\$14.42	\$ 40,000	\$19.23
3004	Administrative Assistant	Non-Exempt	\$ 25,000	\$12.02	\$ 35,000	\$16.83
COMMUNITY DEVELOPMENT						
4001	Community Development Director	Exempt	\$ 35,000	N/A	\$ 50,000	N/A
4003	Code Enforcement Officer	Part-Time	\$ 10.00	\$10.00	\$ 13.40	\$13.40
4003	Building Official	Part-Time	\$ 25.00	\$25.00	\$ 75.00	\$75.00

Classification Code

- 01 Management/Dept. Head
- 02 Mid-level Professional
- 03 Skilled/Specialized Training
- 04 Administrative
- 05 Labor
- 06 Contract worker

~~4-16 Longevity Pay~~

Longevity Pay

Years of Service	Pay Period	Annual Longevity Cost Factor	
5 but less than 10 years	\$7.00	\$364.00	Per eligible employee
10 but less than 15 years	\$9.00	\$468.00	Per eligible employee
15 but less than 20 years	\$11.00	\$572.00	Per eligible employee
20 or more years	\$13.00	\$676.00	Per eligible employee

~~4-17 Standby Pay (Public Works Department)~~

~~Employee placed on standby status shall receive \$11.00 per day, not to exceed seven (7) consecutive days per Section 4-17~~

PERSONNEL POLICIES & PROCERURES

Section 4-4 Classifications

2022/2023 Employee Classification Plan

				Salary Range			
Class Code	Position	Hr. Work	Status	Hourly	Minimum	Hourly	Maximum
ADMINISTRATION (General Fund)							
1001	Town Administrator	2080	Exempt		Charter Officer -Per contract		
1001	Town Clerk	2080	Exempt		Charter Officer -Per contract		
FINANCE DEPARTMENT (General Fund)							
1003	Fiscal Coordinator	2080	Exempt	\$ 22.00	\$ 45,760.00	\$ 30.80	\$ 64,064.00
1004	Utility Billing Clerk	2080	Non-Exempt	\$ 17.00	\$ 35,360.00	\$ 23.80	\$ 49,504.00
PUBLIC WORKS DEPARTMENT (General Fund)							
2001	Public Services Director	2080	Non-Exempt	\$ 28.50	\$ 59,280.00	\$ 39.90	\$ 82,992.00
2002	PW Operations Supervisor	2080	Non-Exempt	\$ 20.00	\$ 41,600.00	\$ 28.00	\$ 58,240.00
WATER UTILITY DEPARTMENT (Enterprise Fund)							
2003	Lead W/WW Operator	2080	Non-Exempt	\$ 23.00	\$ 47,840.00	\$ 32.20	\$ 66,976.00
SEWER/WASTEWATER SERVICES (Enterprise Fund)							
2003	Lead W/WW Operator	2080	Non-Exempt	\$ 23.00	\$ 47,840.00	\$ 32.20	\$ 66,976.00
ROAD AND STREET FACILITIES BUDGET (General Fund)							
2005	Maintenance Worker I	2080	Non-Exempt	\$ 16.00	\$ 33,280.00	\$ 22.40	\$ 46,592.00
PARKS AND RECREATION BUDGET (General Fund)							
2005	Maintenance Worker I	2080	Non-Exempt	\$ 16.00	\$ 33,280.00	\$ 22.40	\$ 46,592.00
SANITATION DEPARTMENT (General Fund)							
2005	Maintenance Worker II	2080	Non-Exempt	\$ 17.00	\$ 35,360.00	\$ 23.80	\$ 49,504.00
POLICE DEPARTMENT (General Fund)							
3001	Police Chief	2080	Non-Exempt	\$ 32.00	\$ 66,560.00	\$ 44.80	\$ 93,184.00
3006	Police Captain	1040	Part-Time	\$ 25.00	\$ 26,000.00		
3002	Police Lieutenant	2236	Non-Exempt	\$ 22.00	\$ 49,192.00	\$ 30.80	\$ 68,868.80
3002	Police Sergeant	2236	Non-Exempt	\$ 21.00	\$ 46,956.00	\$ 29.40	\$ 65,738.40
3003	Police Corporal	2236	Non-Exempt	\$ 20.00	\$ 44,720.00	\$ 28.00	\$ 62,608.00
3003	Police Detective	2080	Non-Exempt	\$ 21.50	\$ 44,720.00	\$ 30.10	\$ 62,608.00
3003	Police Officers	2236	Non-Exempt	\$ 19.00	\$ 42,484.00	\$ 26.60	\$ 59,477.60
3004	Operations Manager	2080	Non-Exempt	\$ 18.00	\$ 37,440.00	\$ 25.20	\$ 52,416.00
3004	Admin Assistant	2080	Non-Exempt	\$ 17.00	\$ 35,360.00	\$ 23.80	\$ 49,504.00
COMMUNITY DEVELOPMENT (General Fund)							
4002	Planner	2080	Exempt	\$ 25.00	\$ 52,000.00	\$ 35.00	\$ 72,800.00
4003	Associate Planner	2080	Non-Exempt	\$ 17.00	\$ 35,360.00	\$ 23.80	\$ 49,504.00
5001	Building Official	2080	Exempt	\$ 28.50	\$ 59,280.00	\$ 39.90	\$ 82,992.00

5003	Building Inspector	2080	Non-Exempt	\$ 22.00	\$ 45,760.00	\$ 30.80	\$ 64,064.00
5004	Permit Tech	2080	Non-Exempt	\$ 17.00	\$ 35,360.00	\$ 23.80	\$ 49,504.00
5006	Code Enforcement	1040	Part-Time	\$ 17.00	\$ 17,680.00		

1	Management/Dept. Head	4	Administrative
2	Mid-level Professional	5	Labor
3	Skilled/Specialized Training	6	Contract worker / Part-Time

4-16 Longevity Pay

Longevity Pay

Years of Service	Pay Period	Annual Longevity Cost Factor	
5 but less than 10 years	\$7.00	\$364.00	Per eligible employee
10 but less than 15 years	\$9.00	\$468.00	Per eligible employee
15 but less than 20 years	\$11.00	\$572.00	Per eligible employee
20 or more years	\$13.00	\$676.00	Per eligible employee

***Paid out in one Check in November each year. (If an employee leaves during the year the prorated amount will be removed from last paycheck)**

4-17 Standby Pay (Public Works Department)

Employee placed on standby status shall receive \$11.00 **\$14.00** per day, not to exceed seven (7) consecutive days per Section 4-17

3-4 Salary Adjustment

Appendix B

Employee Performance Evaluation System

Class Code 01 Employees

	Evaluation Score	Percentage Salary Increase
Salary = Performance based increase		
5 = Outstanding (almost always exceeds the performance standard)	65 -80	2.5%
4 = Exceeds Expectations (generally exceeds the performance standard)	49 - 64	2.0%
3 = Meets Expectations (generally meets the performance standard)	33 - 48	1.5%
2 = Below Expectations (usually does not meet the performance standard)	17 - 32	0%
1 = Unsatisfactory (rarely meets the performance standard)	0 - 16	0%
<i>Note: The Administrator / Town Clerk Salary adjustment as per Contract.</i>		

Class Code 02-05 Employees

	Evaluation Score	Percentage Salary Increase
Salary = Performance based increase		
5 = Outstanding (Performance is <i>consistently</i> above requirements.)	33 - 40	2.5%
4 = Exceeds Expectations (Performance is fully acceptable and results are achieved.)	25 - 32	2.0%
3 = Meets Expectations (generally meets the performance standard)	17 - 24	1.5%
2 = Below Expectations (Performance is below accepted levels for the time in position.)	23 - 9	0%
1 = Unsatisfactory (Performance is clearly below the level of acceptability.)	0 - 9	0%

Appendix C

Performance Evaluation Form

Class Code 02-05 Employees

Employee Name: _____ Job Title: _____

Date of Hire: _____ Review Period: _____ 201_ through _____ 201_

Directions for Evaluating Performance

The following recommendations are designed to assist you in evaluating the performance of your employees:

1. Complete the form considering the employee's performance during the entire review period. The evaluation should be completed prior to meeting with the employee. Evaluate performance using the following ratings.

(1.) UNSATISFACTORY: Performance is clearly below the level of acceptability. This rating describes performance that has not kept pace with changing requirements, successes that have only been occasional, or performance that has been deteriorating. It may also describe the performance of a new employee who has not yet learned the fundamentals of the job. Failure to improve may result in reassignment and/or discipline.

(2.) BELOW EXPECTATIONS: Performance is below accepted levels for the time in position. This rating describes performance which meets only the very minimum position requirements, and which could be improved through development, experience, and/or application.

(3.) MEETS EXPECTATIONS: Performance is at accepted levels for the time in position. This rating describes performance, which meets minimum position requirements and demonstrates the required skills and knowledge for the position.

(4.) EXCEEDS EXPECTATIONS: Performance is fully acceptable, and results are achieved. This rating describes performance that demonstrates the required skills and knowledge for the position and sometimes exceeds expectations.

(5.) OUTSTANDING: Performance is *consistently* above requirements. This rating describes performance that regularly exceeds expectations and demonstrates the willingness to assume additional responsibilities. This rating may also be used as special recognition for extraordinary performance, which has significant impact on the town.

3. Schedule a specific time for the performance evaluation meeting, assuring privacy without interruptions.

4. Conduct the evaluation discussion

- *Explain the purpose and your agenda*
- *Encourage response from the employee and two-way communication*
- *Mutually review performance expectations*
- *Discuss your ratings using specific examples*
- *Recognize areas of achievement and identify opportunities for improvement*
- *Plan performance goals for the next review period*

5. Encourage the employee to make written comments and secure the employee's signature.

6. Forward the completed performance evaluation to Town Administrator for signature. The Town Administrator will then forward the performance evaluation to the Town Clerk's Office for inclusion in the employee's personnel folder.

Appendix C

Performance Evaluation for Non-Exempt Employees

Employee Name: _____ **Job Title:** _____

EVALUATION OF ESSENTIAL JOB FUNCTIONS.

Review the employee's job description and evaluate performance in relation to position requirements.

Technical Skills and Knowledge: Applies knowledge, skills, and mastery of job process to achieve results; expertise is recognized and sought by others; continuously develops and advances technical capabilities.

Essential Job Function: _____

PERFORMANCE FACTORS

Review the following factors in relation to performance of job duties and make specific comments in support of the rating selected:

- 1. Work Quality:** Completes work assignments thoroughly and completely in an accurate, prompt, neat manner. Strives for continuous quality improvement.

Rating: (Check Box) ☐ 1. ☐ 2. ☐ 3. ☐ 4. ☐ 5. ☐

- 2. Productivity:** Produces required volume of work. Maintains attention to details and meets deadlines. Eliminates unnecessary work and activities that do not add value. Strives for more efficient work processes.

Rating: (Check Box) ☐ 1. ☐ 2. ☐ 3. ☐ 4. ☐ 5. ☐

- 3. Innovation/Creativity:** Generates and implements new and useful ideas; ideas reflect "thinking outside the box." Demonstrates willingness to contribute with little direction, voluntarily start projects, and attempt non-routine jobs and tasks. The exercise of judgment and independent actions within limits of authority. The degree to which the employee is self starting and proactive.

Rating: (Check Box) ☐ 1. ☐ 2. ☐ 3. ☐ 4. ☐ 5. ☐

- 4. Integrity/Safety:** Deals with others in a fair, honest and straightforward manner; honors commitments; is trustworthy; takes responsibility for failures and shares credit for successes; uses appropriate discretion and is sensitive to confidentiality; demonstrates high ethical standards. Takes responsibility for ensuring a healthy and safe work environment.

Rating: (Check Box) ☐ 1. ☐ 2. ☐ 3. ☐ 4. ☐ 5. ☐

Appendix C

Performance Evaluation for Non-Exempt Employees

Employee Name: _____ **Job Title:** _____

Employee Comments: (Please Print)

Please respond to the following questions:

1) What do you like most about your job?

2) What do you like least about your job?

3) What would you like to see changed/improved?

4) What are your career objectives?

Rate the Following: (Check Box)	Excellent	Good	Fair	Poor	N/A
<i>Your Salary</i>					
<i>Employee Benefits</i>					
<i>Supervision</i>					
<i>Administration</i>					
<i>Communications</i>					
<i>Your job duties</i>					
<i>Job Safety</i>					
<i>Equipment provided</i>					
<i>Employee Facilities</i>					
<i>Employment Security</i>					
<i>Recognition of Efforts</i>					
<i>Workload</i>					
<i>Working Conditions</i>					
<i>Fair Treatment</i>					
<i>Policies/Procedures (Town)</i>					

Note: This data is for informational purposes only. Your feedback will help the Town of Lake Hamilton determine if changes need to be addressed within our system.



Appendix D PERFORMANCE EVALUATION FORM CLASS CODE 01 EMPLOYEES

Employee Name: _____ Job Title: _____

Date of Hire: _____ Review Period: _____ 201_ through _____ 201_

PERFORMANCE PLANNING AND RESULTS

Performance Review

- Use a current job description (job descriptions as available).
- Rate the person's level of performance, using the definitions below.
- Review with employee each performance factor used to evaluate his/her work performance.
- Give an overall rating in the space provided, using the definitions below as a guide.

Performance Rating Definitions

The following ratings must be used to ensure commonality of language and consistency on overall ratings:
(There should be supporting comments to justify ratings of “Outstanding” “Below Expectations, and “Unsatisfactory”)

65 - 80	Outstanding	Performance is consistently superior
49 - 64	Exceeds Expectations	Performance is routinely above job requirements
33 - 48	Meets Expectations	Performance is regularly competent and dependable
17 - 32	Below Expectations	Performance fails to meet job requirements on a frequent basis
16	Unsatisfactory	Performance is consistently unacceptable

Appendix D

A. PERFORMANCE FACTORS

Administration - Measures effectiveness in planning, organizing and efficiently handling activities and eliminating unnecessary activities.	Outstanding 5 Exceeds Expectations 4 Meets Expectations 3 Below Expectations 2 Unsatisfactory 1	
Knowledge of Work - Consider employee's skill level, knowledge and understanding of all phases of the job and those requiring improved skills and/or experience.	Outstanding 5 Exceeds Expectations 4 Meets Expectations 3 Below Expectations 2 Unsatisfactory 1	
Communication - Measures effectiveness in listening to others, expressing ideas, both orally and in writing and providing relevant and timely information to management, co-workers, subordinates, and customers.	Outstanding 5 Exceeds Expectations 4 Meets Expectations 3 Below Expectations 2 Unsatisfactory 1	
Teamwork - Measures how well this individual gets along with fellow employees, respects the rights of other employees, and shows a cooperative spirit.	Outstanding 5 Exceeds Expectations 4 Meets Expectations 3 Below Expectations 2 Unsatisfactory 1	
Decision Making/Problem Solving - Measures effectiveness in understanding problems and making timely, practical decisions.	Outstanding 5 Exceeds Expectations 4 Meets Expectations 3 Below Expectations 2 Unsatisfactory 1	
Expense Management - Measures effectiveness in establishing appropriate reporting and control procedures; operating efficiently at lowest cost; staying within established budgets.	Outstanding 5 Exceeds Expectations 4 Meets Expectations 3 Below Expectations 2 Unsatisfactory 1	
Management - Measures effectiveness in selecting qualified people; evaluating subordinates' performance; strengths and development needs; providing constructive feedback and taking appropriate and timely action with marginal or unsatisfactory performers.	Outstanding 5 Exceeds Expectations 4 Meets Expectations 3 Below Expectations 2 Unsatisfactory 1	
Independent Action - Measures effectiveness in time management; initiative and independent action within prescribed limits.	Outstanding 5 Exceeds Expectations 4 Meets Expectations 3 Below Expectations 2 Unsatisfactory 1	
Job Knowledge - Measures effectiveness in keeping knowledgeable of methods, techniques and skills required in own job and related functions; remaining current on new developments affecting Lake Hamilton and its work activities.	Outstanding 5 Exceeds Expectations 4 Meets Expectations 3 Below Expectations 2 Unsatisfactory 1	

Appendix D

Leadership - Measures effectiveness in accomplishing work assignments through subordinates; establishing challenging goals; delegating and coordinating effectively; promoting innovation and team effort.	Outstanding 5	
	Exceeds Expectations 4	
	Meets Expectations 3	
	Below Expectations 2	
	Unsatisfactory 1	
Managing Change and Improvement - Measures effectiveness in initiating changes, adapting to necessary changes from old methods when they are no longer practical, identifying new methods and generating improvement in facility's performance.	Outstanding 5	
	Exceeds Expectations 4	
	Meets Expectations 3	
	Below Expectations 2	
	Unsatisfactory 1	
Customer Responsiveness - Measures responsiveness and courtesy in dealing with internal staff, external customers, and vendors; employee projects a courteous manner.	Outstanding 5	
	Exceeds Expectations 4	
	Meets Expectations 3	
	Below Expectations 2	
	Unsatisfactory 1	
Personal Appearance - Measures neatness and personal hygiene appropriate to position.	Outstanding 5	
	Exceeds Expectations 4	
	Meets Expectations 3	
	Below Expectations 2	
	Unsatisfactory 1	
Dependability - Measures how well employee complies with instructions and performs under unusual circumstances; consider record of attendance and punctuality.	Outstanding 5	
	Exceeds Expectations 4	
	Meets Expectations 3	
	Below Expectations 2	
	Unsatisfactory 1	
Safety - Measures individual's work habits and attitudes as they apply to working safely. Consider their contribution to accident prevention, safety awareness, ability to care for Lake Hamilton property and keep workspace safe and tidy.	Outstanding 5	
	Exceeds Expectations 4	
	Meets Expectations 3	
	Below Expectations 2	
	Unsatisfactory 1	
Employee's Responsiveness - Measures responsiveness in completing job tasks in a timely manner.	Outstanding 5	
	Exceeds Expectations 4	
	Meets Expectations 3	
	Below Expectations 2	
	Unsatisfactory 1	

Total Evaluation Score	
-------------------------------	--

Appendix D

B.

EMPLOYEE STRENGTHS AND ACCOMPLISHMENTS: Include those, which are relevant during this evaluation period. This should be related to performance or behavioral aspects you appreciated in their performance.

C.

PERFORMANCE AREAS WHICH NEED IMPROVEMENT:

D.

PLAN OF ACTION TOWARD IMPROVED PERFORMANCE:

E.

EMPLOYEE COMMENTS:

Appendix D**F. JOB DESCRIPTION REVIEW SECTION:** (Please check the appropriate box.)

- ☐ Employee job description has been reviewed during this evaluation and no changes have been made to the job description at this time.
- ☐ Employee job description has been reviewed during this evaluation and modifications have been proposed to the job description. The modified job description is attached to this evaluation.

G. SIGNATURES:

Employee: _____ Date: _____
(Signature does not necessarily denote agreement with official review and means only that the Employee was given the opportunity to discuss and provide comments of the official review with the Administrator.)

Administrator / Supervisor: _____ Date: _____
(Signature)



Appendix E

CONFIDENTIAL

Background Check Authorization Release Form

Print Name: _____
(First) (Middle) (Last)

Former Name(s) and Dates Used: _____

Current Address Since: _____
(Mo/Yr) (Street) (City) (Zip/State)

Previous Address From: _____
(Mo/Yr) (Street) (City) (Zip/State)

Previous Address From: _____
(Mo/Yr) (Street) (City) (Zip/State)

Social Security Number: _____ DOB: _____

Telephone Number: _____

Drivers License Number: _____ State: _____

The information contained in this application is correct to the best of my knowledge.

I hereby authorize the **Town of Lake Hamilton, Florida** and its designated agents and the representatives to conduct a comprehensive review of my background causing a consumer report and/or an investigative consumer report to be generated for employment and/or volunteer purposes. I understand that the scope of the consumer report/ investigative consumer report may include but is not limited to the following areas: verification of social security number; credit reports, current and previous residences; employment history, education background, character references; drug testing, civil and criminal history records from any criminal justice agency in any or all federal, state, county jurisdictions; driving records, birth records, and any other public records.

I further authorize any individual, company, firm, corporation, or public agency to divulge all information, verbal or written, pertaining to me, to the **Town of Lake Hamilton, Florida** or its agents. I further authorize the complete release of any records or data pertaining to me, which the individual, company, firm, corporation, or public agency may have, to include information or data received from other sources. **The Town of Lake Hamilton, Florida** and its designated agents and representatives shall maintain all information received from this authorization in a confidential manner in order to protect the applicant's personal information, including, but not limited to, addresses, social security numbers, and dates of birth.

Signature: _____ Date: _____

Appendix F

NOTICE OF DISCIPLINARY ACTION

Note: Any additional documents relating to this Disciplinary Action must be attached and copies shall be provided to the employee being disciplined.

EMPLOYEE'S NAME: _____ **DATE OF NOTICE:** _____

EMPLOYEE'S POSITION: _____ **DATE OF OCCURRENCE:** _____

SUPERVISOR'S NAME: _____ **POSITION:** _____

TYPE OF VIOLATION:

- | | | | |
|--|---|---------------------------------------|--|
| <input type="checkbox"/> Tardiness | <input type="checkbox"/> Quality of Work | <input type="checkbox"/> Safety | <input type="checkbox"/> Appearance |
| <input type="checkbox"/> Absenteeism | <input type="checkbox"/> Quantity of Work | <input type="checkbox"/> Carelessness | <input type="checkbox"/> Insubordination |
| <input type="checkbox"/> Drug or Alcohol Abuse | <input type="checkbox"/> Other _____ | | |

(Supervisor) Details of Occurrence (Include description of impact on Town)

(Supervisor) Expected Improvement (Include a clear statement as to the consequences of failing to improve)

Continued on reverse side

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

() Verbal Warning () Suspension () With Pay First Day: _____
 () Written Warning () Without Pay Last Day: _____
 () Termination from Employment: Effective Date: _____

Administrator Signature: _____ **Date:** _____ **Time:** _____

Updated 09/2022



**Appendix G
TOWN OF LAKE HAMILTON
EMPLOYEE LEAVE
REQUEST SLIP**

Today's Date: _____

Employee Name: _____

Employee Signature: _____

Date(s) of Requested Leave: _____

Total Hours Requested: _____

Type of Leave: Vacation: _____ Sick: _____ Bereavement: _____ Unpaid: _____
Holiday Included? _____ Comp Time: _____ Court: _____ Other: _____

Employee Supervisor's Name: _____

Supervisor Approval Signature: _____

Payroll Department Review: _____

Comments: _____

