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**Council Budget Workshop**  
**April 17, 2015**

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# FY2016 & FY2017 Budget Workshops

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## City of Charlotte

April 17, 2015  
1:30 p.m. – 4:00 p.m.  
Room CH-14

	Page	
<b>I. Budget Committee Report</b> (1:30 – 1:40 p.m.)		Council member Phipps
<b>II. Introduction – Overview</b> (1:40 – 1:45 p.m.)		Ron Carlee
<b>III. Budget Update</b> (1:45 – 3:15 p.m.)		Ron Carlee/Kim Eagle
• General Fund		
- Expense Reductions	1	
- Program & Service Reductions	17	
- User Fees	23	
• General Community Investment Plan		
- Pay-As-You-Go	29	
<b>IV. Aviation Budget Overview</b> (3:15 – 3:30 p.m.)		Brent Cagle
<b>V. Additional Information</b> (3:30 – 4:00 p.m.)		
• Follow-up on any clarification needed on Questions & Answers from April 8 <sup>th</sup> Budget Workshop	31	Kim Eagle
• Follow-up on any questions from CATS Budget presentation distributed in April 2 <sup>nd</sup> Council packet for April 8 <sup>th</sup> Budget Workshop		John Muth

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Distribution: Mayor and City Council  
Ron Carlee, City Manager  
City Manager's Executive Team  
City Manager's Executive Cabinet  
Office of Strategy & Budget

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# Budget Update

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## General Fund Update

Council Budget Workshop

April 17, 2015



### FY2016 Budget Development Summary

- Challenge: Close an estimated General Fund gap of \$21.7 million, or 3.7%.
- Objective: Provide a structurally balanced budget for FY2016 and beyond that reflects the policy priorities of the Council
  - No short-term fixes
  - No use of one-time funds for on-going expenses
  - No accounting tricks
- Options for Mayor and Council
  - Comply with Council budget principles and priorities
  - Well researched, quantified, strategic and sustainable
  - Best practice oriented and creative
  - Respect City employees

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## Overview

- Numbers are estimates and refinement is on-going
- Options are presented
- These are **not** recommendations, *but moving in that direction*
- This remains a work in progress
  
- Purpose of today's meeting: Get Council feedback to...
  - Present new ideas,
  - Explore range of options acceptable to Council,
  - Inform development of recommendations.

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## Work Since April 8<sup>th</sup> Workshop

- Refined fee options & estimates
- Confirmed and expanded expenditure reductions
- Updated revenue estimates and options
- Revisions & research continues based on Council feedback
- Continues developed service & program reduction options

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## FY2016 Budget Balancing Framework

### A. Expenditure

1. General Fund Expense Transfers
2. **Expense/Line Item Reductions**
3. **Program/Service Reductions**

### B. Revenue & Finance

1. **Fees**
2. **Property Taxes**
3. Pending General Assembly actions

### C. Capital

1. Debt Service Property Tax to Operating
2. FY16 High Priority Projects
3. FY17 Pending Projects
4. **PAYGO**

### D. Future Work

1. Asset sales
2. Take Home Vehicles
3. Cost Allocation/Overhead
4. Facility sale and lease back
5. Fund Balance/Reserve Options
6. Other as identified

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## Revenue & Finance Option Solid Waste Disposal Fee Conversion

- Convert \$47 annual, solid waste disposal fee to equivalent property tax rate
- Spread the cost over total tax base, not just residential
- Substitute regressive consumer tax for wealth based flat tax
- Set substitute rate at appropriate "cost" neutral threshold for taxpayer
- Maximize sales tax distribution from County
- Lower cost for most residential tax payers

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### Revenue & Finance Option Cost Neutral Thresholds

Median Value	\$151,300
Solid Waste Fee	\$47
Property Tax Rate Equivalent	3.11 Cents
Revenue Generated	\$27,647,059
200% of Median Value	\$302,600
Solid Waste Fee	\$47
Property Tax Rate Equivalent	1.55 Cents
Revenue Generated	\$13,823,529
300% of Median Values	\$453,900
Solid Waste Fee	\$47
Property Tax Rate Equivalent	1.04 Cents
Revenue Generated	\$9,215,686

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### Revenue & Finance Option Taxpayer & Revenue Impacts

- Taxpayer Impact at 1.5¢
  - \$36.50 decrease at \$70,000
  - \$31.48 decrease at \$103,500
  - \$24.30 decrease at \$151,300
  - Breakeven point at \$313,350
- Revenue Generated:
  - \$4.5 million FY2016
  - \$1.9 million FY2017 in Higher Sales Tax Distribution

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## Revenue & Finance Option Fees

- 66 User Fees were evaluated for significant adjustments
  - Out of 327 total general fund user fees
- 25 Recommended by staff for 100% recovery
- 41 Subsidized by general taxes
  - 27 Recommended to increase below 100% recovery
- 1 significant new fee (State mandated Fire Inspections)

See hand-out for details

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## Expenditure – Expenses/Line Item Reductions

Department	Amount	% of Total Non-Personnel Budget
City Attorney	111,621	26.5%
City Manager Admin	38,962	13.1%
Clerk	1,350	1.1%
Corporate Communications	53,600	8.2%
Engineering & Property Management	303,288	2.3%
Fire	179,600	1.3%
Human Resources	94,060	9.0%
Innovation & Technology	409,243	2.5%
Management & Financial Services	434,356	3.7%
Mayor/City Council	50,983	17.6%
Neighborhood & Business Services	98,285	2.6%
Non Departmentals	978,840	1.2%
Planning	194,193	18.1%
Police	755,000	2.0%
Solid Waste	29,103	0.1%
Transportation	255,725	2.4%
Totals	3,988,209	1.8%

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## Expenditure – Expenses/Line Item Reductions

Equipment Maintenance/Accident Repairs	616,091
Technology/Telecommunications	533,053
Retirement Payout Reserve	500,000
Travel & Training/Educational Reimbursement	372,266
Contracted Services	360,101
Other	355,619
Fuel	245,534
Frozen Positions	225,719
Temporary Positions	136,821
Office/Operating Supplies	119,879
Vacant Positions (long time vacancy)	111,905
Uniforms	102,600
Council Discretionary	100,000
Utilities	95,340
Subsistence	48,300
Printing	39,749
Dues & Subscriptions & Memberships	25,232
	<b>3,988,209</b>

- Evaluation based on on-going re-set of the budget for FY2016, reductions are permanent

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## Program and Service Reductions

- Various services under review
- Estimated total of \$5 million to \$7 million
  - One Quarter to One Third of Total Gap
- Seeking to minimize impact on staff

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## Expenditure – Compensation

Projected FY2016 General Fund Compensation Scenarios				
Projected FY2016	1% merit, 0.5% market, 2.5%-5% steps	2% merit, 1.0% market, 2.5%-5% steps	3% merit, 1.5% market, 2.5%-5% steps	4% merit, 2.0% market, 2.5%-5% steps
<b>Broadband Pay Plan</b>				
Merit	\$919,305	\$1,838,611	\$2,757,916	\$3,677,221
<b>Public Safety Pay Plan</b>				
Market	\$831,594	\$1,663,187	\$2,494,781	\$3,326,375
Steps	\$2,174,994	\$2,174,994	\$2,174,994	\$2,174,994
<b>Total</b>	<b>\$3,006,588</b>	<b>\$3,838,181</b>	<b>\$4,669,775</b>	<b>\$5,501,369</b>
<b>Grand Total</b>	<b>\$3,925,893</b>	<b>\$5,676,792</b>	<b>\$7,427,691</b>	<b>\$9,178,590</b>

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## Preliminary Balancing Status

- ~~\$3.9m~~ \$3.5m General Fund Transfers
- ~~\$3.8m~~ \$4.0m Expense Reductions
- ~~\$1.0m~~ ~~\$1.6m~~ 1.8m Potential Fee Increases
- \$0.9m - \$2.7m Capital Revenues to Operating
- **\$4.5m from Disposal Fee Conversion**
- = ~~\$9.9m~~ ~~\$12.5m~~ \$14.7 - \$16.5 Changes Identified
  
- ~~46-58%~~ 68-76% of the \$21.7m Gap
- ~~\$9.9m~~ ~~\$11.8m~~ \$7.0m - \$5.2m Gap Remains

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## FY2016 Budget Balancing Framework

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## Capital – PAYGO Gold Line Phase I & II Operating Costs

### Why Now?

- FY2015 first full year of Phase I operations
- Federal Funds expected in FY 2016 for Phase II
- To accept Federal funds and proceed with Phase II, City needs a plan for operating costs

### Current and Future Operating Costs of Gold Line

- Phase 1 - **\$1.5 million**, beginning in **FY2016**
- Phase 2 - **\$4.7 million**, beginning in **FY2019**
- Total annual **\$6.2 million per year operating**
- Plus Capital Maintenance Reserve
  - \$2.7 million every five (5) years for regular vehicle overhauls
  - \$6.6 million every fifteen (15) years for mid-life vehicle overhauls

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## Capital – PAYGO Transit Investment Fund

### Establish New Transit Investment Fund in FY2016

- Segregate revenues and expenses for Gold Line and other transit expenses
- Incorporates other transit-related expenses in PAYGO
- Make Reallocations within PAYGO
- Eliminates no committed projects
- **No Property Tax**
- **No General Fund Operating Funds**
- **No New Revenues – Fees or Taxes -- Other Than Fares**

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## Capital – PAYGO Transit Investment Fund Summary

### Revenue FY 16

- \$11.0 million Vehicle Rental Tax
- \$12.8 million Motor Vehicle License
- [\$1.5 million beginning in FY2019 Gold Line Fares]
- [\$3.6 million beginning in FY2019 Sales Tax Partial transfer from PAYGO (Not from General Fund Operating Sales Tax or from Dedicated Transit Sales Tax)]

### Expenses FY 16

- \$20.1 million CATS MOE
- \$0.7 million County/Towns Contribution to Transit
- \$1.5 million Gold Line Phase I Operating
- [\$4.7 million beginning in FY2019 Gold Line Phase II Operating]
- \$1.5 million Gold Line Maintenance

**SEE HAND-OUT FOR FIVE YEAR PLAN**

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Gold Line Background Slides  
at  
End of Presentation

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## Capital – PAYGO Amendments Under Consideration

- Commit \$2 million annual Business Corridor funding to support Gold Line transit. Conduct revitalization of other corridors through bond-funded Comprehensive Neighborhood Improvement Program and other infrastructure funding
- Allocate \$8.9 million over 3 years (approximately \$2.9m per year) for Short Term Road Congestion Improvements and shift approximately \$5.3 from PAYGO Road Planning funding to Bonds
- Fund Technology Investments at \$0.5 per year (from \$2.0 million currently) pending development of Master Technology Plan
- Fund Phase 2 CMGC Elevator Upgrades \$0.8 million to complete project
- Fund A Way Home Rental Assistance Endowment on schedule to match private contributions while maintaining overall \$10 million pledge (\$4 million already paid). Schedule pending, but will be less than \$2 million planned
- Provide \$0.1 million one-time funding to support Economic Opportunity Task Force

**[SEE HAND-OUT FOR DRAFT ALLOCATIONS & AMENDMENTS](#)**

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## Next Steps

- May 4 - Manager's Recommended Budget Presentation
- May 11 - Public Hearing
- May 13 - Budget Adjustments
- May 27 - Budget Straw Votes
- June 8 - Budget Adoption

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## Gold Line Background Slides

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## CityLYNX Gold Line Phase 2 – Project Status

### Project Status

- September 2014 - City Council authorized the City Manager to submit Federal Small Starts Grant Application for CityLYNX Gold Line Phase 2
  - \$150.0 million total project cost
  - \$75.0 million (50% max) federal share
  - \$75.0 million 50% local share
- February 2015 - Federal Transit Administration recommended the CityLYNX Gold Line Phase 2 for funding,
  - Project is included in President's FY2016 recommended budget for \$75 million
- City Council authorized the spending of \$12.0 million from the City's local match to advance the design of the CityLYNX Gold Line Phase 2 project to a 65% level of design.
  - \$9.0 million local funds spent or encumbered to date
  - Local funds spent will be eligible for future reimbursement upon successful execution of a Small Starts Grant Agreement with the FTA.

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## CityLYNX Gold Line Phase 2 – Project Status

### Project Status

- Potential additional request to City Council to authorize the spending of an additional \$7.0 million from the City's local match to advance the design of the CityLYNX Gold Line Phase 2 project to a 90% level of design.
  - If approved by City Council, total local funds spent or committed to date would be \$16 million
- Upon approval of the Small Starts Grant Agreement, which could be as early as October 2015 (contingent upon Congressional Appropriations)
  - City could draw reimbursement for 50% of the local funds spent to date
  - City could proceed with the fully-funded \$150.0 million Phase 2 project
- CityLYNX Gold Line Phase 2 project will extend the completed Phase 1 project from 1.5 miles to 4.0 miles.
- Upon completion of Phase 2, CityLYNX Gold Line will extend from French Street near Johnson C. Smith University to Sunnyside Avenue on Hawthorne Lane.

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## CityLYNX Gold Line Phase 2 Budgetary and Economic Impact

### Budgetary and Economic Impact of not Proceeding

- If \$75 million local match for CityLYNX Gold Line Phase 2 were eliminated:
  - Project would be ineligible for the Small Starts Grant and opportunity to leverage \$75 million in federal matching funds would be lost
  - Up to \$16.0 million in local funds spent and obligated to date would not be reimbursed
  - The project as currently designed could not be completed.
  - Opportunity for significant economic impact along a key corridor would be lost:
    - **1.1 million** or more square feet in new development:
      - 731 additional residential units
      - 21,800 square feet of additional retail space
      - 276,700 square feet of additional office space
      - 101 additional hotel rooms
    - **\$3.0 billion** in development investment along the 4 mile Gold Line Corridor

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## CityLYNX Gold Line Phase 2 Allocation Options for Local Match

### Allocating \$75 million Local Match to Other Uses

- City's local match of \$75.0 million appropriated by City Council in September 2014 from existing sources in the General Community Investment Fund, including:
  - **\$47.5 million in debt**
  - **\$27.5 million in Pay-As-You-Go**
    - All of the \$9.0 million in local funding spent or encumbered to date for Phase 2 came from Pay-As-You-Go funds
    - Approximately **\$18.5 million available** for allocation to other uses
- Capital funding reallocation
  - Funding for any approved capital projects could be reallocated to any other eligible projects
- Capital funding may also be transferred from capital to operating
  - Every \$10.3 million in debt capacity equates to 0.10 cents in property tax rate

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## CityLYNX Gold Line Phase 2 Operating Costs

### Allocation of Phase 2 Operating Funds – FY2016 – FY2020

- Begin allocating Phase 2 future year operating funds in FY2016:
  - \$1.5 million from Motor Vehicle License revenue for three (3) years (FY2016 - FY2018) to build Capital Maintenance Reserve
  - \$1.5 million from Gold Line Fare revenue beginning in FY2019 to continue Capital Maintenance Reserve
  - \$4.7 million from Motor Vehicle License revenue beginning in FY2019 for Gold Line Phase 2 Operating

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# User Fees

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User Fees - Draft Proposal as of 4/17/15

Red Font indicates new Fee

Regulatory User Fees	FY2015 Current Fee	FY2015 Fee % Subsidy	FY2016 Fee - 100% recovery	% Increase	FY2016 Fee - Staff Recomm	% Subsidy	FY2015 Revenue	FY2016 Revenue w/ Recomm FY2016 Fees*	\$ Change	% Change
<b>Engineering &amp; Property Management - Land Development</b>										
Commercial Plan Review & Inspection	\$1,485	27.21%	\$2,040	37.4%	\$2,040	0.0%	\$274,725	\$396,270	\$121,545	44.2%
Commercial Zoning Plan Review & Inspection (per project, based on construction costs) - collected by Meck Co for COC	\$95-\$920	10.00%	\$115-\$1105	21.0%	\$115-\$1105	0.0%	\$440,000	\$607,504	\$167,504	38.1%
Major Commercial Subdivision Review & Inspection (Per project + per acre fee)	\$3,740 + \$100/acre	53.88%	\$8,110 + \$100/acre	116.8%	\$8,110 + \$100/acre	0.0%	\$32,000	\$84,080	\$52,080	162.8%
Major Residential Subdivision Review & Inspection (Per project + per acre fee)	\$4,200 + \$100/acre	50.79%	\$8,535 + \$100/acre	103.2%	\$8,535 + \$100/acre	0.0%	\$193,285	\$410,005	\$216,720	112.1%
Residential Tree Ordinance (Single-Family Subdivision) and Residential Tree Preservation (per project + per tree fee)	\$1,855 + \$10/tree	9.07%	\$2,040 + \$10/tree	10.0%	\$2,040 + \$10/tree	0.0%	\$45,655	\$52,670	\$7,015	15.4%
Single Family Residential Lot Inspection	\$50	28.57%	\$70	40.0%	\$70	0.0%	\$92,550	\$136,049	\$43,499	47.0%
<b>Sketch Plan - NEW</b>	N/A	N/A	\$80	new fee	\$80	0.0%	N/A	\$2,560	\$2,688	100.0%
<b>Total Projected Revenue</b>							\$1,078,215	\$1,689,138	\$611,051	56.7%

Note: E&PM's fees include filling two new positions (1.5 FTE for FY16 - Plan Review Engineer starting 7/1/15; Zoning Plans Reviewer starting 1/1/16)  
 \*FY2016 includes projected increases in occurrences.

Regulatory User Fees	FY2015 Current Fee	FY2015 Fee % Subsidy	FY2016 Fee - 100% recovery	% Increase	FY2016 Fee - Staff Recomm	% Subsidy	FY2015 Revenue	FY2016 Revenue w/ Recomm FY2016 Fees*	\$ Change	% Change
<b>Transportation</b>										
<b>Land Development Permits and Fees:</b>										
Commercial Building & Driveway Permit/Site Plan (new - combined fees)	\$300	59.5%	\$740	146.7%	\$740	0.0%	\$58,200	\$150,738	\$92,538	159.0%
Rezoning Petition - Major	\$1,400	62.9%	\$3,770	169.3%	\$3,770	0.0%	\$51,800	\$146,465	\$94,665	182.8%
<b>Right of Way Permits - Parade:</b>										
Small < 1,000 attendees	\$50	33.3%	\$75	50.0%	\$75	0.0%	\$3,550	\$5,591	\$2,041	57.5%
Medium 1,000 to 3,000 attendees	\$100	78.7%	\$470	370.0%	\$470	0.0%	\$3,000	\$14,805	\$11,805	393.5%
Large >3,000 attendees	\$200	78.7%	\$940	370.0%	\$940	0.0%	\$4,600	\$22,701	\$18,101	393.5%
Right-of-Way Abandonment**	\$1,450	56.4%	\$3,325	129.3%	\$3,325	0.0%	\$15,950	\$38,404	\$22,454	140.8%
Sidewalk Dining Permit	\$150	33.3%	\$225	50.0%	\$225	0.0%	\$2,250	\$3,544	\$1,294	57.5%
Renewal of Valet Parking Permit	\$100	76.2%	\$420	320.0%	\$420	0.0%	\$2,100	\$9,261	\$7,161	341.0%
<b>Temporary Infrastructure Permit - NEW</b>	N/A	N/A	\$300	new fee	\$300	0.0%	N/A	\$7,875	\$7,875	100.0%
<b>Total Projected Revenue</b>							\$141,450	\$399,383	\$257,933	182.3%

Note: CDOT's fees include filling one Engineering Project Coordinator position.

\*FY2016 includes projected increases in occurrences.

\*\*\$3,325 for one street or alleyway abandonment; \$1,660 for additional street or alley abandonments

Budget Worksheet	FY2015 Current Fee	FY2015 Fee % Subsidy	FY2016 Fee - 100% recovery	% Increase	FY2016 Fee - Staff Recomm	% Subsidy	FY2015 Revenue	FY2016 Revenue w/ Recomm FY2016 Fees*	\$ Change	% Change
<b>Regulatory User Fees</b>										
<b>Planning Department</b>										
<b>Rezonings:</b>										
Conventional Rezonings (combined 3 categories into 1 for conventional)	\$925 to \$2300	10.8% to 64.1%	\$2,578	12.1% to 178%	\$1,950	24.36%	\$27,575	\$37,050	\$9,475	34.4%
Conditional - Minor (Combined 3 categories into 2 categories (minor & major) for conditional)	\$1,250-\$3,100	31.7% to 72.5%	\$4,544	46.6% to 263.5%	\$3,100	31.78%	\$114,900	\$179,800	\$64,900	56.5%
Conditional - Major (Combined 3 categories into 2 categories (minor & major) for conditional)	\$1,250-\$3,100	66.2% to 86.4%	\$9,164	195.0%	\$5,000	45.4%	\$115,000	\$145,000	\$30,000	26.1%
Text Amendment	\$1,000	60.0%	\$2,499	149.9%	\$1,500	40.0%	\$11,000	\$22,500	\$11,500	104.5%
<b>Subdivision Review:</b>										
Preliminary Single Family (Streets)	\$1,450	22.5%	\$1,871	29.0%	\$1,550	17.2%	\$33,350	\$35,650	\$2,300	6.9%
Preliminary Non-Residential	\$1,125	76.8%	\$4,855	331.6%	\$1,200		\$1,125	\$1,200	\$75	6.7%
Preliminary Plan Revisions	\$1,250	-56.3%	\$800	-36.0%	\$1,335		\$21,250	\$22,695	\$1,445	6.8%
Final Plats	\$325	50.79%	\$562	72.9%	\$350	0.0%	\$37,050	\$39,900	\$2,850	7.7%
Condo Plats	\$250	28.57%	\$907	262.8%	\$270	0.0%	\$4,750	\$5,130	\$43,499	47.0%
Planned Multi-Family Review	\$2,000	27.4%	\$2,754	37.7%	\$2,135		\$30,000	\$32,025	\$2,025	6.7%
Sketch Plan - NEW	N/A	N/A	\$590	new fee	\$500	0.0%	N/A	\$16,000	\$16,000	100.0%
Street Exceptions - NEW	N/A	N/A	\$3,523	new fee	\$500	0.0%	N/A	\$2,000	\$2,000	100.0%
<b>Zoning Administration</b>										
Appeals - Residential	\$175	95.8%	\$4,131	2260.6%	\$175	95.8%	\$175	\$175	\$0	0.0%
Appeals - Non-Residential	\$400	61.9%	\$1,049	162.3%	\$400	61.9%	\$2,800	\$2,800	\$0	0.0%
Variances - Residential	\$675	68.2%	\$2,123	214.5%	\$700	67.0%	\$11,475	\$11,900	\$425	3.7%
Variances - Non-Residential	\$1,600	59.4%	\$3,938	146.1%	\$1,650	58.1%	\$17,600	\$18,150	\$550	3.1%
Administrative Deviation - Residential	\$200	90.5%	\$2,096	948.0%	\$200	90.5%	\$2,800	\$2,800	\$0	0.0%
Administrative Deviation - Non-Residential	\$425	91.0%	\$4,720	1010.6%	\$425	91.0%	\$425	\$425	\$0	0.0%
<b>Historic District Review:</b>										
Minor Review - NEW	N/A	N/A	\$588	new fee	\$500	0.0%	N/A	\$41,500	\$41,500	100.0%
Major Review - NEW	N/A	N/A	\$1,405	new fee	\$1,000	0.0%	N/A	\$6,000	\$6,000	100.0%
Major Review with Survey - NEW	N/A	N/A	\$1,950	new fee	\$1,950	0.0%	N/A	\$39,000	\$39,000	100.0%
Total Projected Revenue							\$431,275	\$661,700	\$487,414	53.4%
* FY2016 includes projected increases in occurrences.										
Note: Historic District Review Fee recoups the position added in FY2015 only										

Regulatory User Fees	FY2015 Current Fee	FY2015 Fee % Subsidy	FY2016 Fee - 100% recovery	% Increase	FY2016 Fee - Staff Recomm	% Subsidy	FY2015 Revenue	FY2016 Revenue w/ Recomm FY2016 Fees*	\$ Change	% Change
<b>Regulatory User Fees - NEW</b>										
0 - 2500 square feet	N/A	N/A	\$35	new fee	\$35	0.0%	N/A	\$57,225	\$57,225	100.0%
2,801 - 4,500 square feet	N/A	N/A	\$45	new fee	\$45	0.0%	N/A	\$81,675	\$81,675	100.0%
4,501 - ,000 square feet	N/A	N/A	\$60	new fee	\$60	0.0%	N/A	\$120,900	\$120,900	100.0%
8,001 - 16,000 square feet	N/A	N/A	\$70	new fee	\$70	0.0%	N/A	\$107,520	\$107,520	100.0%
16,001 - 50,000 square feet	N/A	N/A	\$90	new fee	\$90	0.0%	N/A	\$100,710	\$100,710	100.0%
50,001 - 100,000 square feet	N/A	N/A	\$105	new fee	\$105	0.0%	N/A	\$33,285	\$33,285	100.0%
100,001 - 500,000 square feet	N/A	N/A	\$135	new fee	\$135	0.0%	N/A	\$23,355	\$23,355	100.0%
500,001 + square feet	N/A	N/A	\$270	new fee	\$270	0.0%	N/A	\$5,130	\$5,130	100.0%
Interior Suite or floor	N/A	N/A	\$35	new fee	\$35	0.0%	N/A	TBD	TBD	100.0%
Apt Building	N/A	N/A	\$45	new fee	\$45	0.0%	N/A	TBD	TBD	100.0%
Parking Deck	N/A	N/A	\$270	new fee	\$270	0.0%	N/A	TBD	TBD	100.0%
Vacant Buildings	N/A	N/A	\$35	new fee	\$35	0.0%	N/A	\$49,210	\$49,210	100.0%
<b>Total Projected Revenue</b>							\$0	\$579,010	\$579,010	100.0%

Cities currently collecting fee: Raleigh, Durham, Fayetteville, Asheville, Wilmington, Concord, Wake Forest, High Point, Hickory,

Regulatory User Fees	FY2015 Current Fee	FY2015 Fee % Subsidy	FY2016 Fee - 100% recovery	% Increase	FY2016 Fee - Staff Recomm	% Subsidy	FY2015 Revenue	FY2016 Revenue w/ Recomm FY2016 Fees*	\$ Change	% Change
<b>Police</b>										
<b>Adult Business Fees</b>										
Application Fee	\$2,545	30.0%	\$3,635	42.8%	\$2,725	25.0%	\$53,445	\$57,225	\$3,780	7.1%
Building Design Change Fee	\$1,165	10.7%	\$1,305	12.0%	\$1,250	4.2%	\$1,165	\$1,250	\$85	7.3%
License Fee	\$915	68.2%	\$2,880	214.8%	\$980	66.0%	\$19,215	\$20,580	\$1,365	7.1%
<b>Dance Hall License Fees</b>										
Application/Renewal Fee	\$2,655	13.2%	\$3,060	15.3%	\$2,840	7.2%	\$21,240	\$22,720	\$1,480	7.0%
License Fee	\$935	13.4%	\$1,080	15.5%	\$1,000	7.4%	\$7,480	\$8,000	\$520	7.0%
Building Design Change Fee	\$1,250	56.6%	\$2,880	130.4%	\$1,340	53.5%	\$1,250	\$1,340	\$90	7.2%
<b>Passenger Vehicle for Hire Fees</b>										
Application Fee	\$250	63.5%	\$685	174.0%	\$270	60.6%	\$4,000	\$4,320	\$320	8.0%
Certificate/Permit Fee	\$440	46.0%	\$815	85.2%	\$470	42.3%	\$6,600	\$7,520	\$920	13.9%
<b>Driver/Chauffeur Fees</b>										
Add or Change a Company Affiliation	\$80	46.7%	\$150	87.5%	\$85	43.3%	\$8,000	\$8,500	\$500	6.3%
New Driver/Chauffeur Fee	\$15	82.4%	\$85	466.7%	\$15	82.4%	\$3,975	\$3,975	\$0	0.0%
Replace Driver Permit	\$80	85.5%	\$550	587.5%	\$80	85.5%	\$800	\$800	\$0	0.0%
<b>Vehicle Fees</b>										
Replace Vehicle Permit	\$120	95.6%	\$2,745	2187.5%	\$130	95.3%	\$240	\$260	\$20	8.3%
Transfer Vehicle Permit	\$105	41.7%	\$180	71.4%	\$115	36.1%	\$8,820	\$9,660	\$840	9.5%
<b>Total Projected Revenue</b>							\$136,230	\$146,150	\$9,920	7.3%

Budget Work	FY2015 Current Fee	FY2015 Fee % Subsidy	FY2016 Fee - 100% recovery	% Increase	FY2016 Fee - Staff Recomm	% Subsidy	FY2015 Revenue	FY2016 Revenue w/ Recomm FY2016 Fees*	\$ Change	% Change
<b>Regulatory User Fees</b>										
<b>Neighborhood &amp; Business Services</b>										
<b>Zoning Administration</b>										
Residential Single Family Reviews	\$40	61.2%	\$103	157.5%	\$45	56.3%	\$193,040	\$217,170	\$24,130	12.5%
Sign Permits </= 100 Square Feet	\$150	44.9%	\$272	81.3%	\$160	41.2%	\$240,900	\$256,960	\$16,060	6.7%
Sign Permits >/= 100 Square Feet	\$215	21.0%	\$272	26.5%	\$230	15.4%	\$26,875	\$28,750	\$1,875	7.0%
Verification Letters	\$60	76.0%	\$250	316.7%	\$65	74.0%	\$45,720	\$49,530	\$3,810	8.3%
Zoning Use Permits	\$155	86.4%	\$1,139	634.8%	\$165	85.5%	\$118,730	\$126,390	\$7,660	6.5%
<b>Total Projected Revenue</b>							<b>\$625,265</b>	<b>\$678,800</b>	<b>\$53,535</b>	<b>8.6%</b>

Budget Work	FY2015 Current Fee	FY2015 Fee % Subsidy	FY2016 Fee - 100% recovery	% Increase	FY2016 Fee - Staff Recomm	% Subsidy	FY2015 Revenue	FY2016 Revenue w/ Recomm FY2016 Fees*	\$ Change	% Change
<b>Regulatory User Fees</b>										
<b>City Clerk's Office</b>										
Legal Advertisements for Rezoning Petitions	\$200	34.4%	\$305	52.5%	\$225	26.2%	\$24,400	\$27,450	\$3,050	12.5%
<b>Total Projected Revenue</b>							<b>\$24,400</b>	<b>\$27,450</b>	<b>\$3,050</b>	<b>12.5%</b>

Budget Work	FY2015 Current Fee	FY2015 Fee % Subsidy	FY2016 Fee - 100% recovery	% Increase	FY2016 Fee - Staff Recomm	% Subsidy	FY2015 Revenue	FY2016 Revenue w/ Recomm FY2016 Fees*	\$ Change	% Change
<b>Regulatory User Fees</b>										
<b>Total Projected Revenue</b>										
							<b>\$2,436,835</b>	<b>\$4,181,631</b>	<b>\$2,001,912</b>	<b>71.6%</b>

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# **General Community Investment Plan**

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## NEW Transit Investment Fund

Row	Revenues	FY2016	FY2017	FY2018	FY2019	FY2020	TOTAL
1	Vehicle Rental Tax	\$ 11,003,963	\$ 11,224,042	\$ 11,448,523	\$ 11,677,494	\$ 11,911,043	\$ 57,265,065
2	Motor Vehicle License	12,769,191	13,128,056	13,390,617	13,658,429	13,931,597	66,877,890
3	CityLynx Gold Line Phase II Fares				1,500,000	1,500,000	3,000,000
4	Sales Tax - Partial Transfer from PAYGO		67,580	246,026	3,578,119	3,869,388	7,761,113
5	<b>TOTAL</b>	<b>\$ 23,773,154</b>	<b>\$ 24,419,678</b>	<b>\$ 25,085,166</b>	<b>\$ 30,414,042</b>	<b>\$ 31,212,028</b>	<b>\$ 134,904,068</b>
	<b>Expenses</b>						
6	CATS MOE	\$ 20,106,177	\$ 20,709,362	\$ 21,330,643	\$ 21,970,562	\$ 22,629,679	\$ 106,746,423
7	Transit Contribution to County & Towns	663,686	676,959	690,499	704,309	718,395	3,453,848
8	CityLynx Gold Line Phase I	1,503,291	1,533,357	1,564,024	1,595,305	1,627,211	7,823,188
9	CityLynx Gold Line Phase II				4,643,866	4,736,743	9,380,609
10	CityLynx Gold Line Capital Reserve	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	7,500,000
11	<b>TOTAL</b>	<b>\$ 23,773,154</b>	<b>\$ 24,419,678</b>	<b>\$ 25,085,166</b>	<b>\$ 30,414,042</b>	<b>\$ 31,212,028</b>	<b>\$ 134,904,068</b>

## FY2016 - FY2020 Community Investment Plan

### PRELIMINARY AMENDED PAY-AS-YOU-GO SCHEDULE

Row	REVENUES	FY2016	FY2017	FY2018	FY2019	FY2020	TOTAL
1	Property Tax (1.20¢)	\$ 10,763,013	\$ 10,898,305	\$ 11,037,163	\$ 11,110,861	\$ 11,270,072	\$ 55,079,414
2	Property Tax - Synthetic TIG	96,635	121,996	146,202	238,014	246,794	849,641
3	PAYGO Fund - Interest Income	287,130	354,690	481,365	557,370	557,370	2,237,925
4	Sales Tax	16,539,822	17,051,136	17,471,845	14,759,877	15,110,438	80,933,118
5	Motor Vehicle Licenses	101,452			-	-	101,452
6	Grant Program Income	500,000	500,000	500,000	500,000	500,000	2,500,000
7	FY2015 Capital Fund Balance	228,725	166,425	179,530			574,680
8	FY2015 Capital Reserve	400,000					400,000
9	FY2016 Capital Reserve	747,200					747,200
10	County Contribution to CMGC Elevators	152,800					152,800
11	Sale of Land	1,095,000	719,686	239,785			2,054,471
12	<b>TOTAL REVENUES</b>	<b>\$ 30,911,777</b>	<b>\$ 29,812,238</b>	<b>\$ 30,055,890</b>	<b>\$ 27,166,122</b>	<b>\$ 27,684,674</b>	<b>\$ 145,630,701</b>
<b>EXPENDITURES</b>							
13	<b>Contributions to Others</b>						
14	Cultural Facilities	\$ 8,272,222	\$ 8,437,666	\$ 8,606,419	\$ 8,778,548	\$ 8,954,118	\$ 43,048,973
15	<b>Economic Development &amp; Neighborhoods</b>						
16	Economic Opportunity Task Force	100,000					100,000
17	Neighborhood Grants	325,000	325,000	325,000	325,000	325,000	1,625,000
18	Synthetic TIG Projects	61,733	63,841	81,927	148,549	156,452	512,502
19	<b>Environmental Services</b>						
20	Environmental Services Program	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000	6,000,000
21	Tree Replacement Program	700,000	700,000	700,000	700,000	700,000	3,500,000
22	Tree Trimming and Removal Program	1,400,000	1,400,000	1,400,000	1,400,000	1,400,000	7,000,000
23	<b>Facilities Maintenance &amp; Renovation</b>						
24	Americans With Disabilities Act (ADA)	400,000					400,000
25	Building Maintenance					3,904,140	18,046,706
26	Fire Station Renovations	400,000	400,000	400,000	400,000	400,000	2,000,000
27	Government Center and Plaza Maintenance	700,000	700,000	700,000	700,000	700,000	3,500,000
28	Government Center Elevator Upgrades	800,000					800,000
29	Landscape and Median Renovation	250,000	250,000	250,000	250,000	250,000	1,250,000
30	Parking Lot/Deck Repairs	300,000	300,000	300,000	300,000	300,000	1,500,000
31	Roof Replacement Program	1,500,000	1,500,000	1,500,000	1,500,000	1,500,000	7,500,000
32	<b>Housing Program</b>						
33	HOME Grant Match	912,997	912,997	912,997	912,997	912,997	4,564,985
34	Innovative Housing	4,380,180	4,380,180	4,380,180	4,380,180	4,380,180	21,900,900
35	In Rem Remedy - Residential	550,000	550,000	550,000	550,000	550,000	2,750,000
36	Rental Assistance Endowment (A Way Home)	TBD	TBD	TBD	TBD	TBD	TBD
37	<b>Technology Services</b>						
38	Technology Investments	500,000	500,000	500,000	500,000	500,000	2,500,000
39	<b>Transportation Infrastructure</b>						
40	Short Term Road Congestion Improvements	2,876,019	2,963,539	3,052,810			8,892,368
41	Road Planning/Design/ROW	1,192,036	1,145,878	1,098,795	1,050,771	1,001,787	5,489,267
42	Sidewalk and Curb Repairs	550,000	550,000	550,000	550,000	550,000	2,750,000
43	<b>TOTAL EXPENDITURES</b>	<b>\$ 30,911,777</b>	<b>\$ 29,812,238</b>	<b>\$ 30,055,890</b>	<b>\$ 27,166,122</b>	<b>\$ 27,684,674</b>	<b>\$ 145,630,701</b>

## PAYGO AMENDMENTS

<u>Row</u>	<u>Revenues</u>	<u>FY2016</u>	<u>FY2017</u>	<u>FY2018</u>	<u>FY2019</u>	<u>FY2020</u>	<u>TOTAL</u>
1	Base Estimates	\$ 53,784,931	\$ 54,231,916	\$ 55,141,056	\$ 56,080,164	\$ 57,396,702	\$ 276,634,769
2	Vehicle Rental Tax - Move to Transit Fund	(11,003,963)	(11,224,042)	(11,448,523)	(11,677,494)	(11,911,043)	(57,265,065)
3	Motor Vehicle License - Move to Transit Fund	(12,769,191)	(13,128,056)	(13,390,617)	(13,658,429)	(13,931,597)	(66,877,890)
4	Sales Tax - Partial Transfer to Transit Fund	-	(67,580)	(246,026)	(3,578,119)	(3,869,388)	(7,761,113)
5	New Additions from Reserve & Fund Balance <sup>(a)</sup>	747,200					747,200
<b>7</b>	<b>Total Revenue</b>	<b>\$ 30,911,777</b>	<b>\$ 29,812,238</b>	<b>\$ 30,055,890</b>	<b>\$ 27,166,122</b>	<b>\$ 27,684,674</b>	<b>\$ 145,630,701</b>
<u>Row</u>	<u>Expenditures</u>						
8	Base Estimate	\$ 53,784,931	\$ 54,231,916	\$ 55,141,056	\$ 56,080,164	\$ 57,396,702	\$ 276,634,769
9	CATS MOE Transfer Out - Move to Transit Fund	(20,106,177)	(20,709,362)	(21,330,643)	(21,970,562)	(22,629,679)	(106,746,423)
10	Contribution to County & Towns - Move to Transit Fund	(663,686)	(676,959)	(690,499)	(704,309)	(718,395)	(3,453,848)
11	CityLYNX Gold Line Phase I - Move to Transit Fund	(1,503,291)	(1,533,357)	(1,564,024)	(1,595,305)	(1,627,211)	(7,823,188)
12	Business Corridor - Reallocate to Transit	(2,000,000)	(2,000,000)	(2,000,000)	(2,000,000)	(2,000,000)	(10,000,000)
13	Road Planning - Transfer >\$1m to Bond	(876,019)	(963,539)	(1,052,810)	(1,143,866)	(1,236,743)	(5,272,977)
14	Reduce Technology Pending Plan	(1,500,000)	(1,500,000)	(1,500,000)	(1,500,000)	(1,500,000)	(7,500,000)
15	Add Govt Center Elevator Upgrades	800,000					800,000
16	Add Contribution to A Way Home Rental Endowment	TBD	TBD	TBD	TBD	TBD	-
17	Add Economic Opportunity Task Force (One-time)	100,000					100,000
18	Short Term Road Congestion Improvements <sup>(b)</sup>	2,876,019	2,963,539	3,052,810			8,892,368
19	<b>Total Amendments</b>	<b>(22,873,154)</b>	<b>(24,419,678)</b>	<b>(25,085,166)</b>	<b>(28,914,042)</b>	<b>(29,712,028)</b>	<b>(131,004,068)</b>
<b>20</b>	<b>Net Remaining PAYGO Expenditures</b>	<b>\$ 30,911,777</b>	<b>\$ 29,812,238</b>	<b>\$ 30,055,890</b>	<b>\$ 27,166,122</b>	<b>\$ 27,684,674</b>	<b>\$ 145,630,701</b>

(a) Future Reserves are anticipated but not projected due to the high level of variability

(b) Gold Line Phase 2 operating funds needed in future years is allocated in early years to short term road congestion improvements in critical corridors

**NOTE: See attached Preliminary Amended PAYGO Schedule for adjusted allocations to Road Planning and Technology**

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**Aviation  
FY2016 & FY2017 Budget  
Presentation**

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**Materials to be distributed at the  
April 17<sup>th</sup> Budget Workshop**

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# **Questions & Answers From April 8<sup>th</sup> Council Budget Workshop**

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# *Questions and Answers*

## *April 8<sup>th</sup> Budget Workshop*

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### **General Fund Update**

**Question 1:** *Why does the updated property revaluation number result in a more significant impact to the City than to the County?*

The estimates provided by the Mecklenburg County Tax Assessor in March of 2015 indicated the total property values in Mecklenburg County are 1.3% below what they anticipated during the budget season last year. The City of Charlotte is expected to be 2.2% below the budgeted values set for FY2015. In addition to the City of Charlotte, three other Mecklenburg County municipalities – Matthews, Mint Hill, Pineville – are expected to have lower values. Cornelius, Davidson, Huntersville, Stallings and the unincorporated part of the County are expected to exceed the property valuation estimates provided last spring, which mitigates the overall impact to Mecklenburg County.

The following table lists the percentage change for Mecklenburg County, its municipalities, and the unincorporated area:

<b>Jurisdiction</b>	<b>% Change</b>
Mecklenburg	-1.3%
Cornelius	0.9%
Davidson	0.6%
Huntersville	2.3%
Matthews	-1.2%
Mint Hill	-0.5%
Pineville	-2.0%
Stallings	1.2%
Unincorporated	3.0%

**Question 2:** *What is the process for property revaluations?*

Attachment #1 is the memo from the County Tax Assessor that was distributed at the March 26, 2015 Budget Committee Meeting. Pages 1 and 2 of the memo summarize the property revaluation process.

**Question 3:** *How are sales tax revenues comparing to projections?*

The FY2015 (current year) General Fund Sales Tax revenues are projected to exceed the budget by approximately \$5.5 million or 6.8%. For FY2016, the projected sales tax growth remains projected at 3.5%.

**Question 4:** *What is the sales tax to assessment ratio outlined in NC General Statutes, and how does it apply, if at all, to the timing of Mecklenburg County property revaluations?*

North Carolina General Statute §105-286 describes the guidelines associated with Mandatory Advancement of a reappraisal based upon a county's sales assessment ratio. The specific language is as follows:

- **Mandatory Advancement:** A county with a population 75,000 or greater according to the most recent annual population estimates certified to the Secretary by the State Budget Officer must conduct a reappraisal of real property when the county's sales assessment ratio determined under G.S. 105-289(h) is less than .85 or greater than 1.15, as indicated on the notice the county receives under General Statutes 105-284. A reappraisal required under this subdivision must become effective no later than January 1 of the earlier of the following years:
  - The third year following the year the county received the notice.
  - The eighth year following the year of the county's last reappraisal.

The Department of Revenue's annual sales assessment ratio study compares property tax assessments with actual sales prices for real property throughout a given county. If a ratio is greater than 100%, then that county's tax assessments are on average higher than actual market values. During "normal" economic times a county's ratio will gradually decrease in between county-wide reappraisals, because the tax assessments remain constant while real estate prices gradually increase (Chris McGlaughlin, North Carolina School of Government, June 21, 2012, <http://canons.sog.unc.edu/?p=6632>).

The latest estimate (January 1, 2014) from the North Carolina Department of Revenue estimates the Mecklenburg County sales assessment ratio at 94.18, which falls within the range that would not constitute a mandatory advancement (less than .85 or greater than 1.15).

**Question 5:** *What is the process related to property taxes bills that are past due?*

The Tax Collector has the authority to garnish wages, and seize and sell property for delinquent taxes. All delinquent tax payers are listed in the newspaper annually and collection agencies are utilized. In addition, the County can seize delinquent taxpayers' state income tax refund via the North Carolina debt setoff program.

The property tax bill past due process includes the following:

- The tax lien or assessment date each year is January 1<sup>st</sup>
- Taxes are due and payable annually on September 1<sup>st</sup>
- 2014 Taxes are payable without interest through January 5, 2015
- An interest charge of 2% will be assessed on 2014 delinquent property tax bills on January 6, 2015
- An interest charge of three-fourths of one percent is assessed on February 1<sup>st</sup>, and each month thereafter until the taxes are paid in full
- Delinquent notices are mailed in February and March

**Question 6:** *For which special events does the City charge fees?*

In FY2014, the City of Charlotte provided support to approximately 240 different special events throughout the year. Services include security patrol, traffic safety and direction emergency management, garbage and recycling collection, delivery of barricades, litter picking, and street sweeping. Annual events supported by City departments include: Speed Street, Taste of Charlotte, Ringling Bros. and Barnum & Bailey Circus, CIAA Basketball Tournament, Christmas Tree Lighting, First Night, St. Patrick's Day and Thanksgiving Day Parades, and Red, White and Boom. Ongoing events supported by City Departments include: Charlotte Pride Festival, MLK Holiday Parade, marathons, bike races, as well as Carolina Panthers, Charlotte Hornets, and Charlotte Knights' home games and ACC Championship and Belk Bowl Football games.

Examples of fees charged by City department for special events are summarized below.

**Solid Waste Services (SWS)**

Solid Waste Services primarily charges for social and cultural events, festivals, and charity events with sponsors based upon projected costs. The City does not charge for most sporting related and government sponsored events. In FY2015 collections total \$75,000 to date. Staff is evaluating a fee methodology and collection approach for these SWS supported events.

**Neighborhood and Business Services (N&BS)**

Each year, N&BS supports the Neighborhood Symposium, and charges a range of \$100 to \$150 to individual event vendors. Revenue from the event totals approximately \$1,000, which recovers the cost of the event.

**Charlotte Department of Transportation (CDOT)**

CDOT charges permitting fees for special events to recover administrative costs. The revenue estimate for FY2015 is approximately \$18,000. The specific special event fees include:

- Festival Permits
  - Small 1 day events = no fee; Large festivals >1 day = \$350/day
- Parade Permits
  - Small = \$50, Medium = \$100, Large = \$200
- Temporary Infrastructure Permit for activities located in on-street parking spaces
  - Creation of fee is being evaluated for implementation in FY2016

**Charlotte Fire Department (Fire)**

The Fire Department's special events user fees recover costs for special events requiring CFD's involvement. For FY2015, the revenue to date is approximately \$60,400. The specific special event fees include:

- Explosives/Fireworks indoors = \$175
- Explosives/Fireworks outdoors = \$250
- Tent Permit/Temporary Membrane Structure = \$125
- Places of Assembly = \$175

Charlotte-Mecklenburg Police Department (CMPD)

The estimated FY2015 special event fee revenue for CMPD is approximately \$1,730, collected for the following special event fee:

- Carnival Permit = \$865

**Question 7:** *What types of competitive pricing practices does the City use as part of its procurement practices?*

The following are examples of competitive pricing practices and procedures used by the City:

1. Invitation to Bid (ITB) – City conducted competitive bidding process used for commodities and construction (per State Statutes 143-129)
2. Request for Proposal (RFP) – City conducted competitive bidding process used for services and technology (technology per state statutes/ services not covered by statutes but City policy)
3. Cooperative Purchasing Contracts - Use of competitively bid contracts by a formally organized program that offers contracts to other public agencies
4. State Contracts – Contracts solicited and awarded by the NC Division of Purchase and Contracts
5. Federal (General Services Administration) Contracts – Contracts solicited and awarded by the General Services Administration for federal agencies (some are offered to local governments)
6. Piggyback – Contracts solicited and awarded by another public agency within the last 12 months for the exact same items and specifications (only applies to commodities and must be \$100,000 or more)
7. Information Technology goods and services – Contracts solicited and awarded by the state Office of Information Technology Services can be used by the City
8. Sole Source – Only applies to commodities. The statutes allows an exception to the competitive bidding laws when:
  - a. Performance or price for a product is not available; or
  - b. A needed product is available from only one source of supply; or
  - c. Standardization or compatibility is the overriding consideration

**Question 8:** *What is the status of the City/County Real Estate ledger?*

At the end of FY2014, the City/County Real Estate ledger balance was \$1,652,149 (credit to the City). There have been no transactions during FY2015.

The FY2000 budget included a transition to increase fund balance from 10% to 16% -- an increase of two percentage points annually, beginning in FY2001 and ending in FY2003. This change in fund balance policy was raised by the Mayor at the February 1999 Council Retreat as part of a discussion whether to rebate cash reserves above the 10% policy to property owners or increase the fund balance level due to uncertainty of state shared revenues. The topic was referred to the Council Budget Committee, which recommended increasing the fund balance

level. The City Manager incorporated this direction into her FY2000 and FY2001 Recommended Budget, which was subsequently adopted by the City Council in June 1999.

The process to amend the fund balance policy is that Council may take action at any time to set a new level. This is customarily done as part of the budget process.

During FY2016, staff proposes to further study the fund balance level in the context of all reserves, AAA bond rating requirements, and any other potential impacts, for consideration in FY17.

**Question 10:** *Is the County evaluating any adjustments to land development user fees? Related to the current study of permitting and inspection processes (conducted by Gartner), are there any recommendations related to FY2016 land development fees?*

Currently, Mecklenburg County Land Development has not recommended any adjustments to land development user fees for FY2016. The fees are calculated for full cost recovery.

Under an agreement between the City Manager and Mecklenburg County Manager, Gartner Consulting performed an audit of the permitting and inspection process both for site work and vertical construction between July and December 2015. The Gartner report does not directly include fee recommendations. Gartner's Executive Summary references staffing levels as follows, which could impact fees:

- Establishing a vision of balancing increasing workload and customer expectations with a finite staff; and
- Noted that "recession-level staffing coupled with growing demand is steadily impacting productivity"

The City's proposed FY2016 fee schedule may include additional staff in an effort to continue to meet the current high level of service and is not related to particular recommendations in the Gartner report.

Additional information on the Gartner report can be found at the following site: <http://charmec.org/mecklenburg/county/LUESA/CodeEnforcement/BDC/Pages/BDC%20Quarterly%20Bulletin.aspx>

**Question 11:** *Please provide the impact of the current revaluation projections, as compared to the initial projections, categorized by loss of revenue, discoveries and appeals from public service companies.*

Data from the Tax Assessor's Office on March 6, 2015 indicated a revised, downward projection of assessed property values for the City in FY2015 of \$2.0 billion, which is comprised of the following:

Category of Assessed Property Value	\$ Change
Appeals Loss (from Pearson review)	\$800 million
Discoveries of new property	770 million
Public Service Companies	330 million
Business Personal Property	100 million
<b>Total</b>	<b>\$2.0 billion</b>

The impact of the \$2.0 billion loss in the assessed property value base is \$9.0 million in FY2015 property tax revenue. The property tax rate adjustment that would make up this loss is 1.03¢.

The revenue neutral tax rate set in FY2012 was based on an expectation of anticipated Appeals Loss that have now been exceeded (based on the Pearson review). Had the current estimate of losses been assumed at that time, the revenue neutral property tax rate would have been 0.41¢ higher.

## Financial Partners

**Question 12:** *What are the per capita formulas and agreements related to multi-jurisdictional funding partners, such as the Charlotte Regional Partners and Centralina Council of Governments, including the contributions from other local governments?*

There are three key regional partnerships in which the City participates and contributes financially on a per capita basis: Charlotte Regional Partnership, Centralina Council of Governments, and the Charlotte Regional Transportation Planning Organization. The following table lists each of these three agencies and the corresponding per capita contribution. Additional detail about each funding arrangement is provided below the following summary table:

Regional Agency	City of Charlotte Per Capita Contribution	FY16 Requests
Charlotte Regional Partnership	\$0.30	\$148,780
Centralina Council of Governments	\$0.24	\$189,420
Charlotte Regional Transportation Planning Organization	\$0.27*	\$210,710

\*This contribution is based on the percentage of the total Metropolitan Planning Organization population each member jurisdiction represents; however, the per capita contribution would calculate to this amount.

### Charlotte Regional Partnership

Each of the Charlotte region's 16 member counties contributes \$0.30 per capita annually to the Charlotte Regional Partnership (CRP). Certified population numbers for North Carolina counties are derived from the NC State Data Center housed within the NC Office of State Budget and Management and are the same numbers used in the distribution of state shared revenues to local governments. Consequently, as the populations increase/decrease from year-to-year, the funding requested by the CRP would change annually.

Historically, the City of Charlotte and Mecklenburg County have split Mecklenburg County's annual contribution to the CRP, with the City paying \$0.15 per capita on the County's population and Mecklenburg County paying \$0.15 per capita on the County's population. In other words, the City of Charlotte and Mecklenburg County split the County population equally in determining the annual contribution to the CRP.

<b>Charlotte Regional Partnership Member Jurisdiction</b>	<b>2013 Population (100% @ 15 cents per capita)</b>	<b>2013 Population (50% @ 30 cents per capita)</b>	<b>Per Capita Contribution FY2016 Request</b>
City of Charlotte	991,867	495,934	\$148,780
Mecklenburg County	991,867	495,934	\$148,780

### **Centralina Council of Governments**

Centralina Council of Governments (CCOG) is comprised of local governments in the nine county Centralina region. The organization's goal is to grow jobs and the economy, control the cost of government, and improve the quality of life in its communities. Membership dues comprise approximately 5% of CCOG's total revenues. CCOG receives the majority of its revenue from Federal and State technical assistance grants and contracts with local governments for grant and program administration. Dues are \$.24 per capita with a minimum of \$750 required from all member jurisdictions. The table below includes the population and FY2016 dues for all CCOG members.

<b>CCOG Member Jurisdiction</b>	<b>2013 Population Estimate</b>	<b>FY2016 Requested Dues</b>
Albemarle	15,904	\$3,817
Anson County	26,318	\$6,316
Ansonville	620	\$750
Badin	1,967	\$750
Belmont	10,634	\$2,552
Bessemer City	5,379	\$1,291
Cabarrus County	178,072	\$42,737
Charlotte	789,248	\$189,420
Cherryville	5,782	\$1,388
China Grove	4,176	\$1,002
Cleveland	871	\$750
Concord	83,279	\$19,987
Cornelius	27,655	\$6,637
Cramerton	4,689	\$1,125
Dallas	4,667	\$1,120
Davidson	12,040	\$2,890
East Spencer	1,517	\$750
Fairview	3,485	\$836
Faith	813	\$750
Gaston County	209,571	\$50,297
Gastonia	72,947	\$17,507
Granite Quarry	2,998	\$750
Harrisburg	13,996	\$3,359

<b>CCOG Member Jurisdiction</b>	<b>2013 Population Estimate</b>	<b>FY2016 Requested Dues</b>
Harmony	538	\$750
Hemby Bridge	1,531	\$750
High Shoals	697	\$750
Huntersville	52,278	\$12,547
Indian Trail	35,795	\$8,591
Iredell County	164,974	\$39,594
Kannapolis	43,769	\$10,505
Kings Mountain	10,615	\$2,548
Lake Park village	3,324	\$798
Landis	3,108	\$750
Lilesville	534	\$750
Lincoln County	79,745	\$19,139
Lincolnton	10,550	\$2,532
Locust	3,033	\$750
Lowell	3,614	\$867
Marshville	2,467	\$750
Marvin village	6,110	\$1,466
Matthews	29,464	\$7,071
McFarlan	118	\$750
McAdenville	660	\$750
Mecklenburg County	991,867	\$238,048
Midland	3,368	\$808
Mineral Springs	2,783	\$750
Mint Hill	24,790	\$5,950
Misenheimer village	677	\$750
Monroe	33,708	\$8,090
Mooresville	35,156	\$8,437
Morven	500	\$750
Mount Holly	14,271	\$3,425
Mount Pleasant	1,704	\$750
New London	606	\$750
Norwood	2,368	\$750
Oakboro	1,906	\$750
Peachland	426	\$750
Pineville	8,276	\$1,986
Polkton	3,191	\$766
Ranlo	3,470	\$833
Red Cross	745	\$750
Richfield	620	\$750
Rockwell	2,121	\$750
Rowan County	138,448	\$33,228
Salisbury	33,726	\$8,094
Spencer	3,267	\$784
Spencer Mountain	0	\$750
Stallings	14,777	\$3,546
Stanley	3,609	\$866
Stanly County	60,612	\$14,547

CCOG Member Jurisdiction	2013 Population Estimate	FY2016 Requested Dues
Statesville	24,981	\$5,995
Troutman	2,515	\$750
Union County	211,539	\$50,769
Unionville	6,141	\$1,474
Wadesboro	5,692	\$1,366
Waxhaw	11,311	\$2,715
Weddington	9,931	\$2,383
Wesley Chapel	8,069	\$1,937
Wingate	3,674	\$882
<b>Total</b>	<b>3,600,397</b>	<b>\$875,869</b>

### Charlotte Regional Transportation Planning Organization

The Charlotte Regional Transportation Planning Organization (CRTPO) is the federally designated Metropolitan Planning Organization (MPO) for the Charlotte Urbanized Area. CRTPO receives most of its funding from the US Department of Transportation Federal Transit Administration Planning Work Program (UPWP). In lieu of membership dues, CRTPO members are required to contribute to the UPWP local match requirement, an amount that is determined by the Federal Transit Administration, based on the percentage of the total MPO population each member jurisdiction represents. The City of Charlotte serves as CRTPO's host organization, providing administrative support and managing federal reporting requirements for the MPO.

The table below includes a list of all CRTPO member jurisdictions, their current populations, their percentage of the total MPO population, and their FY2016 local match.

CRTPO Member Jurisdiction	Member Population	% of Population	FY2016 Local Match
Charlotte	766,289	61.9%	\$210,710
Cornelius	25,062	2.0%	\$6,891
Davidson	11,637	0.9%	\$3,200
Fairview	3,324	0.3%	\$914
Huntersville	48,734	3.9%	\$13,401
Indian Trail	33,518	2.7%	\$9,217
Iredell County	33,258	2.7%	\$9,145
Marshville	2,772	0.2%	
Marvin	5,579	0.5%	\$1,534
Matthews	27,198	2.2%	\$7,479
Mecklenburg County	758	0.1%	\$208
Mineral Springs	2,639	0.2%	\$726

CRTPO Member Jurisdiction	Member Population	% of Population	FY2016 Local Match
Mint Hill	28,443	2.3%	\$7,821
Monroe	33,884	2.7%	\$9,317
Mooresville	68,786	5.6%	\$18,914
Pineville	11,507	0.9%	\$3,164
Stallings	13,835	1.1%	\$3,804
Statesville	32,258	2.6%	\$8,870
Troutman	11,251	0.9%	\$3,094
Union County	44,926	3.6%	\$12,354
Waxhaw	9,859	0.8%	\$2,711
Weddington	9,459	0.8%	\$2,601
Wesley Chapel	7,643	0.6%	\$2,102
Wingate	5,855	0.5%	\$1,610
NCDOT		0%	
MTC (Transit)		0%	
<b>Total</b>	<b>1,238,474</b>	<b>100%</b>	<b>\$340,549</b>

**Question 13:** *If reductions were made to the proposed FY2016 Out of School Time Partner allocations, what is the impact to the number of children served?*

The table below lists three funding scenarios and the number of children served under each scenario.

- Scenario 1 is the Out of School Time Evaluation Committee’s recommendation maximizing federal Community Development Block Grant (CDBG) funds in the amount of \$815,007, and allocating \$164,927 in local PAYGO funds to achieve the full funding recommendation of \$979,934
  - Scenario 1 funds six partners and serves 901 children
- Scenario 2 applies only the \$815,007 in federal CDBG funds, which excludes the \$164,927 PAYGO allocation; the funding reduction is applied at a proportional 18% across all recommended Out of School Time agencies.
  - Scenario 2 funds six partners and serves 749 children, a reduction of 152 children compared to Scenario 1
- Scenario 3 applies only the \$815,007 in federal CDBG funds, excluding the \$164,927 PAYGO allocation; the funding reduction is applied based on the Evaluation Committee’s scores, which would eliminate funding altogether for Bethlehem Center and would reduce funding to the YWCA by \$50,993
  - Scenario 3 funds five partners and serves 753 children, a reduction of 148 children compared to Scenario 1
  - The Out of School Time Evaluation Committee *does not recommend* this option. The Committee indicated both Bethlehem Center and

YMCA are strong programs that serve some of the most vulnerable youth in critical need areas, and that both providers scored well based on the program evaluation criteria and complied with the instructions provided by the City.

<b>Scenario 1 – Evaluation Committee Recommendation: \$815,007 federal CDBG; \$164,927 PAYGO = 901 children served, six agencies funded</b>					
Out of School Time Agency	FY16-FY17 Score	FY16-FY17 \$ Request	Federal/PAYGO share	FY16-FY17 Agency Allocation	# of Children To Be Served
Citizen Schools	287	\$200,000	83% CDBG (\$815,007)	\$200,000	166
Police Activities League	281	\$200,000		\$200,000	195
Greater Enrichment Program	280	\$200,000		\$200,000	170
Behailu Academy	262	\$66,000	17% PAYGO (\$164,927)	\$66,000	55
YWCA	236	\$200,000		\$200,000	225
Bethlehem Center	221	\$113,934		\$113,934	90
				<b>\$979,934</b>	<b>901</b>

<b>Scenario 2 – Eliminate PAYGO allocation evenly among all recommended agencies: \$815,007 federal CDBG; \$0 PAYGO = 749 children served, six agencies funded</b>					
Out of School Time Agency	FY16-FY17 Score	FY16-FY17 \$ Request	100% Federal only	FY16-FY17 Agency Allocation	# of Children To Be Served
Citizen Schools	287	\$200,000	100% Federal (\$815,007)	\$166,339.16	138
Police Activities League	281	\$200,000		\$166,339.16	162
Greater Enrichment Program	280	\$200,000		\$166,339.16	141
Behailu Academy	262	\$66,000	0% PAYGO (\$0)	\$54,891.92	46
YWCA	236	\$200,000		\$166,339.16	187
Bethlehem Center	221	\$113,934		\$94,758.43	75
<b>Total</b>		<b>\$979,934</b>		<b>\$815,007</b>	<b>749</b>

<b>Scenario 3 - Eliminate PAYGO allocation for agencies with lower scores: \$815,007 federal CDBG; \$0 PAYGO = 753 children served, five agencies funded</b>					
Out of School Time Agency	FY16-FY17 Score	FY16-FY17 \$ Request	100% Federal only	FY16-FY17 Agency Allocation	# of Children To Be Served
Citizen Schools	287	\$200,000	100% Federal (\$815,007)	\$200,000	166
Police Activities League	281	\$200,000		\$200,000	195
Greater Enrichment Program	280	\$200,000		\$200,000	170
Behailu Academy	262	\$66,000	0% PAYGO (\$0)	\$66,000	55
YWCA	236	\$200,000		\$149,007	167
Bethlehem Center	221	\$113,934		\$0	0
<b>Total</b>		<b>\$979,934</b>		<b>\$815,007</b>	<b>753</b>

**Question 14:** *Provide background of when Community Link and Crisis Assistance Ministries moved from General Fund to PAYGO and why?*

Community Link, formerly UJAMMA, Inc., is a Department of Housing and Urban Development (HUD) approved housing counseling agency that provides financial literacy training to enable individuals to obtain safe, decent, and affordable housing. Based on staff research, Community Link has received PAYGO Innovative Housing funding since becoming a City of Charlotte Financial Partner in Fiscal Year 1998.

Crisis Assistance Ministries has been a City of Charlotte Financial Partner for over 30 years. Based on staff research, Crisis Assistance Ministries was funded from the General Fund until approximately 1987. In 1987, PAYGO was established, and the funding for Crisis Assistance Ministries transitioned from the General Fund to the Innovative Housing component of PAYGO.

**Question 15:** *What are Mecklenburg County's contribution levels for the ASC as well as both the Foundation For The Carolinas' Third Grade Reading and Economic Opportunity Task Force initiatives?*

Arts & Science Council

In FY2015, Mecklenburg County contributed \$350,000 to the Arts & Science Council (ASC), specifically designated for Studio 345, an arts after school program; this was also the funding level for the three preceding years. For FY2016, the ASC has requested \$2.3 million from the County.

The FY2015 City Financial Partner allocation to the ASC was \$2,940,823 in undesignated funding. The ASC has requested \$3,980,823 from the City for FY2016.

The following table summarizes the Financial Partner allocations to the ASC from the County and City. These amounts do not include funding for cultural facilities, public art, or the employee fundraising campaign.

<b>Arts &amp; Science Council (ASC) Financial Partner Funding by City and County</b>				
<b>ASC Program</b>	<b>County: FY15 Funding for ASC</b>	<b>City: FY15 Funding for ASC</b>	<b>County: FY16 Request from ASC</b>	<b>City: FY16 Request from ASC</b>
Undesignated	\$0	\$2,940,823	\$0	\$3,980,823
Studio 345	350,000	0	350,000	0
Restored Education Funding	0		1,025,000	
Expanded Programming and Infrastructure	0	0	925,000	0
<b>Total</b>	<b>\$350,000</b>	<b>\$2,940,823</b>	<b>\$2,300,000</b>	<b>\$3,980,823</b>

Third Grade Reading Initiative

The Foundation For the Carolinas requested \$100,000 in support of the Charlotte Third Grade Reading Initiative from the County for FY2016, which is the same level of funding requested of the City.

Economic Opportunity Task Force

The Foundation For the Carolinas requested \$100,000 in support of the Economic Opportunity Task Force from both Mecklenburg County and the City of Charlotte.

The County Manager is scheduled to present her FY2016 budget recommendations on May 28, 2015.

**Question 16:** *What factors did the Out of School Time Evaluation Committee consider when reviewing the applications, and what were the Evaluation Committee's rankings related to FY16 recommended funding?*

The evaluation criteria for the Out of School Time Partners request for proposal process includes a total of 300 points, which are categorized as follows:

- Program Characteristics = 120 points
  - Quality Staff & Programming = 40 points
  - Family Engagement & Support = 30 points
  - Effective Partnerships = 30 points
  - Financial Sustainability = 20 points
- Program Strategies = 100 points
  - Engagement in Varied Academic and Non-Academic Activities = 25 points
  - Exposure to New and Engaging Experiences = 25 points
  - Opportunities for Positive Social Interaction = 25 points
  - Promotion of Community Engagement = 25 points
- Site Visits & Interviews = 80 points
  - Program Site Visit = 40 points
  - Staff Interviews = 40 points
- Grand Total = 300 points

The following table includes the current year budget for Out of School Time Partners, as well as the FY16 and FY17 two-year funding requests, and Evaluation Committee score.

Agency	FY15 Budget	FY15 Federal/ PAYGO share	FY16 & FY17 Request	FY16 & FY17 Evaluation Cmte Rec	FY16 & FY17 Proposed Federal/ PAYGO share	FY16 & FY17 Evaluation Committee score
<b>Current Financial Partner Requests</b>						
Above and Beyond Students	\$110,358	60% federal (\$785,261) / 40% PAYGO (\$522,385)	\$0	\$0	83% federal (\$815,007) / 17% PAYGO (\$164,927)	Did not apply
Citizen Schools	306,342		200,000	\$200,000		287
Greater Enrichment Program	350,000		200,000	\$200,000		280
Police Activities League	287,410		200,000	\$200,000		281

Agency	FY15 Budget	FY15 Federal/PAYGO share	FY16 & FY17 Request	FY16 & FY17 Evaluation Cmte Rec	FY16 & FY17 Proposed Federal/PAYGO share	FY16 & FY17 Evaluation Committee score
Youth Development Initiative	94,710		0	\$0		Did not apply
YWCA Central Carolinas After School Enrichment	158,826		200,000	\$200,000		236
<b><u>New Financial Partner Requests</u></b>						
Behailu Academy	n/a		66,000	\$66,000		262
Bethlehem Center	n/a		113,934	\$113,934		221
Genesis Project	n/a		192,000	\$0		Not eligible
MGR Youth Empowerment	n/a		156,000	\$0		Not recommended for funding
<b>TOTAL</b>	<b>\$1,307,646</b>		<b>\$1,327,934</b>	<b>\$979,934</b>		

**Question 17:** *Other than the Out of School Time Partners, of the Financial Partners receiving City PAYGO funds, what are the options to use only federal funds and eliminate the PAYGO contribution?*

Partners Receiving 100% Federal Funds

There are two Financial Partners that receive 100% federal funds; these Partners receive specially designated grants (e.g. Housing Opportunities For Persons With AIDS):

- Carolinas Care Partnership
- Charlotte Family Housing

Partners Receiving 75% Federal and 25% PAYGO Funds

There are two Financial Partners that receive a combination of 75% federal funds and 25% PAYGO funds; only 75% of these Partners are eligible for federal funds due to federal eligibility requirements related to serving populations with less than 80% area median income:

- Charlotte Mecklenburg Housing Partnership - Affordable Housing
- Charlotte Mecklenburg Housing Partnership - House Charlotte

Partners Receiving 100% PAYGO Funds

There are two Financial Partners that receive 100% PAYGO funds; based upon federal eligibility requirements, these two Financial Partners could only be eligible for the "administration portion" of the City's allocated CDBG funds, which is currently 100% allocated to the Out of School Time Partners per Council policy; in other words, the only way to fund these Partners with federal funds is to reduce the allocation to Out of School Time Partners.

- Crisis Assistance
- Community Link

The following table summarizes the impact of eliminating the City's PAYGO contribution, utilizing only federal funds. Under this option, two Financial Partners are eliminated: Community Link and Crisis Assistance.

Agency	FY15 Budget	FY15 PAYGO	FY16 Request	FY16 Funding level with only federal funds (no City PAYGO)	Change from FY15 to FY16 with no PAYGO contribution
<b>Financial Partners Receiving 75% Federal &amp; 25% City PAYGO Funds</b>					
CMHP - Affordable Housing	\$1,960,000	\$490,000	\$1,960,000	\$1,470,000	-\$490,000
CMHP - House Charlotte	231,000	57,750	231,000	173,250	-57,750
<b>Sub Total</b>	<b>\$2,191,000</b>	<b>\$547,750</b>	<b>\$2,191,000</b>	<b>\$1,643,250</b>	<b>-\$547,750</b>
<b>Financial Partners Receiving 100% City PAYGO Funds</b>					
Community Link	\$450,000	\$450,000	\$450,205	\$0	-\$450,000
Crisis Assistance	380,000	380,000	500,000	0	-380,000
<b>Sub Total</b>	<b>\$830,000</b>	<b>\$830,000</b>	<b>\$950,205</b>	<b>\$0</b>	<b>-\$830,000</b>
<b>Grand Total</b>					
	<b>\$3,021,000</b>	<b>\$1,377,750</b>	<b>\$3,141,205</b>	<b>\$1,643,250</b>	<b>-\$1,377,750</b>

**Question 18:** *What would be the impact of transferring \$1 million in Arts & Science Council funding to the Tourism II Fund?*

Transferring \$1 million from the General Fund to the Tourism II Fund for the Arts & Science Council eliminates the remaining \$12.4 million debt capacity in the Tourism II Fund, which is not recommended by staff. If the existing debt capacity were eliminated, the City would be unable to consider funding any of the following potential capital needs for cultural and arts facilities.

Tourism II Fund Potential Capital Needs	Fiscal Year Needed	City Share of Estimated Funding
Discovery Place Technology Upgrades	FY2016	\$3.5 million
Ovens Auditorium Upgrades	FY2017	\$20.0 million
Blumenthal 25 Year Anniversary Upgrades	FY2017	\$10.0 million
Discovery Place 40 Year Anniversary Phase I Upgrades	FY2019	\$25.0 million
<b>Total Capital Needs FY2016 – FY2019</b>		<b>\$58.5 million</b>

## General Community Investment Plan Update

**Question 19:** *If the City changed the property tax allocation in the Municipal Debt Service Fund supporting the General Community Investment Plan, what is the potential impact to available funds?*

The approved FY2015 property tax rate for the City of Charlotte is 46.87¢ per \$100 valuation. The property tax rate is distributed and dedicated to three major components of the City's Budget:

Property Tax Rate Distribution		
General Fund	36.00¢	76.8%
Municipal Debt Service Fund	9.67¢	20.6%
Pay-As-You-Go Capital	1.20¢	2.6%
<b>Total Property Tax Rate</b>	<b>46.87¢</b>	

One cent on the property tax rate produces approximately \$8.9 million in revenues. If the City were to transfer property tax allocation supporting the Community Investment Plan to the General Fund, each .10¢ transfer of the property tax rate would produce \$890,000 in General Fund revenue annually.

Property Tax Rate Transfer	General Fund Revenue Created
0.10 cents transfer	\$0.9 million to General Fund Revenue
0.20 cents transfer	\$1.8 million to General Fund Revenue
0.30 cents transfer	\$2.7 million to General Fund Revenue

Current unallocated debt capacity in the Municipal Debt Service Fund is \$78 million, up from \$55 million due to additional debt capacity created from current refundings. This debt capacity can be used to fund General Community Investment Plan programs and projects through General Obligation Bonds and Certificates of Participation, including transportation, neighborhood improvements, housing diversity, and facilities.

Each .10¢ transfer from the Municipal Debt Service Fund reduces debt capacity for the Community Investment Plan by \$10.3 million.

Property Tax Rate Transfer	Debt Capacity Reduced	Operating Revenue Created
0.10 cents transfer	\$10.3 million	\$0.9 million
0.20 cents transfer	\$20.6 million	\$1.8 million
0.30 cents transfer	\$30.9 million	\$2.7 million

**Question 20:** *Please provide a comprehensive summary of all revenue streams going into capital programs/debt capacity?*

The following two tables summarize the FY2015 revenue sources supporting the General Community Investment Plan Pay-As-You-Go Fund and the Municipal Debt Service Fund, respectively.

**Pay-As-You-Go Fund (PAYGO)**

The PAYGO Fund provides cash investments for relatively small capital projects and ongoing capital facility maintenance programs. Revenues supporting the PAYGO Program include a portion of the City’s Sales Tax and Motor Vehicle License revenue, a dedicated 1.20¢ of the 46.87¢ Property Tax rate, dedicated revenues from the Vehicle Rental Tax supporting transit, and other current (non-recurring) revenues including capital fund balances, grant funding, and interest earnings. This mix of revenues supports the City’s financial policy of diversified revenue sources for the Community Investment Plan. The following table summarizes the revenues supporting the Pay-As-You-Go Fund.

<b>PAYGO Revenues</b>	<b>FY2015</b>	<b>% of Total Revenue</b>
Sales Tax	\$15,500,000	28.1%
Motor Vehicle Licenses	12,220,161	22.2%
Property Tax	10,746,529	19.5%
Vehicle Rental Tax	10,343,148	18.7%
Capital Fund Balance	5,375,291	9.7%
Grant Program Income	600,000	1.1%
Interest Income	295,000	0.5%
Property Tax – Synthetic TIG	86,110	0.2%
<b>Total All Revenues</b>	<b>\$55,166,239</b>	<b>100%</b>

**Municipal Debt Service Fund**

The Municipal Debt Service Fund is used to account for the accumulation of resources and the payment of principal, interest, and related costs for long-term debt, including debt issued through General Obligation Bonds and Certificates of Participation in support of the General Community Investment Plan. Revenues are provided primarily through property and sales taxes. Property Tax revenue is derived from a dedicated 9.67¢ of the 46.87¢ Property Tax rate. The following table summarizes the revenues supporting the Municipal Debt Service Fund.

<b>Municipal Debt Service Revenues</b>	<b>FY2015</b>	<b>% of Total Revenue</b>
Property Tax	\$ 86,204,445	70.1%
Sales Tax	15,500,000	12.6%
Contributions from Other Funds <sup>(a)</sup>		
General Fund	15,662,983	12.7%
Powell Bill Fund	1,257,486	1.0%
Mecklenburg County <sup>(b)</sup>	288,274	0.2%
Interest Earnings	1,528,000	1.2%
Proceeds from Lease Purchases	750,000	0.6%
Property Tax – Synthetic TIG	693,901	0.6%
Other <sup>(c)</sup>	1,080,981	0.9%
<b>Total All Revenues</b>	<b>\$ 55,166,239</b>	<b>100%</b>

- (a) Contributions from Other Funds support debt service payments on capital equipment and other lease purchases including vehicles and public safety communication equipment.
- (b) The FY2015 contribution from Mecklenburg County represents the final payment of the County’s share of debt service on General Obligation Bonds issued in 1993 and 1995 for parks facilities.
- (c) Other revenue includes Alcoholic Beverage Control, Beer & Wine License Fees and Fines, and other miscellaneous income.

**Question 21:**

However, \$59.7 million, or 24.0% of the capital needs identified in the March 2014 list were funded in FY2015. Staff has continued to review and update the list of capital needs to identify the highest priority needs and match those needs to available capital funding sources. The FY2016-FY2017 List of Potential Adjustments and Additions to the General Community Investment Plan presented to City Council on April 8, 2015 is the result of our continued review and update of the City's highest priority capital needs.

The high priority capital needs identified at the April 8<sup>th</sup> Budget Workshop for consideration in FY2016 would fund an additional \$26.5 million in capital projects, and the capital project adjustments and additions pending consideration in FY2017 represent another \$35.8 million in potential capital investments.

When and how to fund any of the remaining future capital needs that were not funded in FY2015, or are not included in either the FY2016 High Priority needs or the FY2017 pending capital considerations, will depend on the relative priority of each and on the annual identification of available funding sources within the existing tax framework.

For comparison, the following table provides a summary of the List of Potential Capital Considerations presented to City Council in March 2014 showing which of those capital considerations were funded in FY2015, alongside the list of high priority potential needs being considered for FY2016 and the potential capital adjustments and additions pending consideration in FY2017, as presented to City Council on April 8, 2015.

List from Last Year of Potential Capital Considerations For FY2015 - FY2019  
Presented to City Council March 2014  
Updated March 2015: Last Year's Potential Capital Considerations Funded in FY2015  
Updated April 2015: Compare FY2015 List To FY2016-FY2017 List

Project	FY2015 Estimate Capital Cost	FY2015 Funded Capital Cost	FY2016 High Priority	FY2017 Pending	Updated April 2015 Additional Annual Operating Expense
<b>FY2015 - FY2019 CIP - Potential New Considerations</b>					
<b>Neighborhoods &amp; Housing Diversity</b>					
A New Home (Rental Assistance Endowment)	8,000,000	2,000,000	2,000,000		\$0
<b>Total Neighborhoods &amp; Housing Diversity</b>	<b>8,000,000</b>	<b>2,000,000</b>	<b>2,000,000</b>		<b>\$0</b>
<b>Transportation</b>					
N. Tryon Redevelopment			3,500,000		\$50,000
Beatties Ford Road Widening			5,000,000		\$50,000
I-85 North Bridge - Research Drive - J.W. Clay				4,000,000	\$5,000
Idlewild Road/Monroe Road Intersection				3,340,000	\$2,500
Neighborhood Transportation Program	37,500,000	5,200,000		5,000,000	\$50,000
<b>Total Transportation</b>	<b>37,500,000</b>	<b>5,200,000</b>	<b>8,500,000</b>	<b>12,340,000</b>	<b>157,500</b>
<b>Facilities/Infrastructure/Equipment</b>					
Americans with Disabilities Act (ADA) Investments	800,000	800,000			TBD
CMPD Central Division Station	7,500,000	-	13,500,000		\$385,000
CMPD Providence Division Station Expansion				3,000,000	\$5,000
Asset Recovery and Disposal (ARD) and Commissioning/Decommissioning	3,000,000	-			\$0
CDOT Transportation Operations Facility Replacement	5,000,000	-			\$50,000
Charlotte Vehicle Operations Center (CVOC) Facility -- Risk Management	2,100,000	-		2,100,000	\$10,000
CMGC Elevator Upgrade	1,160,000	400,000	800,000		\$0
CMGC Space Reconfiguration (all floors)	20,600,000	-			\$0
CMGC South Plaza Waterproofing	350,000	350,000			\$0
CMGC HVAC Improvement Program	8,000,000	-			\$0
CMGC Plaza Renovation	1,200,000	-			\$0
CMGC - Upgrade Security and A/V Equipment	325,000	-			\$2,500
CMGC Parking Deck Office	120,000	-			\$0
Carpet, Relocations, Furniture & Fixtures	1,200,000	-			\$0
CMGC Blinds Replacement	800,000	-			\$0
CMGC Basement Parking Security Renovations	400,000	-			\$0
CMGC Re-Caulking (exterior)	1,100,000	1,100,000			\$0
CMGC Fitness Center Renovation	800,000	-			\$0
TreesCharlotte	1,000,000	100,000			\$0
Fire Station Renovations	500,000	-			\$0
Infill Fire Station - Hidden Valley	7,700,000	-		5,940,000	\$1,669,947
Infill Fire Station - Clanton and I-77	7,700,000	-		6,490,000	\$1,669,947
Zoning Ordinance Study and Revisions	1,081,540	1,081,540			\$0
Police/Fire Academy Land	230,000	230,000			\$1,000
Fire Apparatus - Station 28 ladder and Station 42 engine	1,384,027	-			\$100,500
<b>Total Facilities/Infrastructure/Equipment</b>	<b>74,050,567</b>	<b>4,061,540</b>	<b>14,300,000</b>	<b>17,530,000</b>	<b>\$3,893,894</b>
<b>Technology</b>					
Myers Street Data Center Expansion	1,637,134	-			\$23,000
311/Government Center Network Infrastructure Upgrade	1,318,953	1,223,200			\$200,000
Public Safety Radio Network (Redundancy)	1,132,044	1,028,281			\$20,000
E-Agenda	250,000	225,000			\$25,000
Resiliency, Redundancy, Security, & Ongoing Equipment	60,854,199	-			\$8,500,000
PeopleSoft Upgrade			1,700,000		
Unified Communication (VOIP)				3,894,000	\$966,000
<b>Total Technology</b>	<b>\$ 65,192,330</b>	<b>\$ 2,476,481</b>	<b>\$ 1,700,000</b>	<b>\$ 3,894,000</b>	<b>\$9,734,000</b>
<b>Other Facilities</b>					
Time Warner Cable Arena Improvements	41,915,310	30,500,000			\$0
Bojangles Coliseum Renovations	12,000,000	15,453,375			\$0
<b>Total Other Facilities</b>	<b>53,915,310</b>	<b>45,953,375</b>	<b>-</b>	<b>-</b>	<b>\$0</b>
<b>Total Potential New Considerations</b>	<b>\$ 238,658,207</b>	<b>\$ 59,691,396</b>	<b>\$ 26,500,000</b>	<b>\$ 33,764,000</b>	<b>\$13,785,394</b>
<b>Percent of Potential New Considerations Funded in FY2015 25.0%</b>					
<b>FY2015 - FY2019 CIP - Adjustments to Approved Community Investment Plan</b>					
Cross Charlotte Multi-Use Trail	-	-		2,000,000	\$25,000
Replace Park South Division CMPD Northwest Division (New) (FY21) (No Change in Funding)	-	-			\$8,500,000
Joint Communications Data Center	10,000,000 +	-			TBD
<b>Total Adjustments to Approved CIP</b>	<b>10,000,000 +</b>	<b>-</b>	<b>-</b>	<b>2,000,000</b>	<b>\$8,525,000</b>
<b>Total All Capital Cost</b>	<b>\$ 248,658,207 +</b>	<b>\$ 59,691,396</b>	<b>\$ 26,500,000</b>	<b>\$ 35,764,000</b>	<b>\$22,310,394</b>
<b>Percent of All Capital Cost Funded in FY2015 24.0%</b>					

## Additional Questions From Mayor and Council

**Question 22:** *Related to the City's right-of-ways (ROW), what are the current commercial uses and how is the City being compensated for those uses?*

Below are descriptions of each commercial use of the public ROW, including information about fees and the cost recovery for each activity.

### FY2016 Fees & Cost Recovery Structure

Right-of-Way Activities	Fee Structure	Estimated Revenue	General Fund Cost Recovery
<b>Commercial Use</b>			
Utility Installation & Maint.*	Annual invoice	\$620,000	100%
ROW Leasing**	Vendor billed after completing construction	\$429,502	100%
Sidewalk Dining	User Fee-annual permit	\$3,375	100%
Tryon St. Mall Vendors	Annual permit fee	\$2,590	100%
Valet Parking	User Fee-annual permit	\$8,820	100%
Festivals	User Fee-by permit	\$58,850	100%
Parades, Walks & Runs	User Fee-by permit	\$41,045	100%
General ROW Use Permits**	None	\$0	0%
ROW Encroachment	By permit-User Fee	\$68,400	100%
Temporary Infrastructure†	User Fee-by permit	\$7,500	N/A
<b>Other Mgmt Activities</b>			
ROW Abandonment	By permit-User Fee	\$36,575	100%
Venue Support	None	\$0	0%
Oversized Load Moves	None	\$0	0%
<b>Total Estimated Revenue</b>		<b>\$1,276,657</b>	
*Does not include High Speed Fiber calculations			
**Does not include fees for meter reservations			
†New fee proposed for FY2016 (non-regulatory user fee)			

Note: Estimated revenue for FY2015 ROW activities is approximately \$1,212,000

### Service Descriptions

#### **Commercial Use of Right-of-Way**

##### Utility Installation and Maintenance

All utilities, installed in City-maintained ROW, are regulated under the Utility ROW ordinance. The fees for utility work are billed out once a year based on annual operation costs and actual usage by each utility company.

##### Right-of-Way Leasing

This program of work handles requests to close off portions of public ROW to enable construction of buildings on private property. The City recovers a lease fee in the amount of twelve (12) percent of the annual land tax value per square foot of the adjacent property times the number of square feet being leased. The revenue is collected upon completion of construction.

### Sidewalk Dining

This program allows restaurant operators, subject to certain requirements, to create seating in the public ROW. The City recovers the cost to administer this program, which includes permitting and inspection.

### Tryon Street Mall Vendors

This program allows portable retail stands to be located in the ROW of the Tryon Street Mall area. The City partners with Charlotte Center City Partners to oversee the daily activities of this program.

### Valet Parking

This program allows valet parking companies to operate in the ROW to provide parking services to private businesses. The City recovers its cost for the administration of the program, which includes permitting and inspection.

### Festivals (Public Assemblies)

Festival organizers pay a permit application fee to cover the cost of City staff time spent on coordinating and planning the event. Fees for Police Officers patrolling the event are handled separately.

### Parades, Walks, and Runs

Event organizers pay a permit application fee to cover the cost of City staff time spent on coordinating and planning the event. Fees for Police Officers patrolling the event are handled separately.

### General Right-of-Way Use Permits

Charlotte Department of Transportation (CDOT) issues approximately 800 ROW use permits for a wide variety of temporary activities; including private construction, film productions, building maintenance, etc. To encourage citizens to coordinate their activities with City staff, the administration of the permit and the temporary use of the ROW are free.

### Right-of-Way Encroachment

This program of work allows for private citizens and businesses to install non-standard items in the right-of-way. Examples include irrigation systems, decorative pavers, underground retaining wall tie-backs, etc. The city recovers its cost for the administration of this program.

### Temporary Infrastructure (NEW)

CDOT proposed a new fee category for FY2016 to include permitting for different types of ROW uses such as food trucks, parklets, private art, little libraries, etc.

## **Other Right-of-Way Management Activities**

### Right-of-Way Abandonment

CDOT administers the City's process for abandoning public right-of-way. The City recovers its cost for the administration of this program. By law, the City cannot gain revenue from the value of the land.

### Venue Support

CDOT provides coordination and support for venues that generate a large volume of traffic and/or pedestrians. Examples of locations include Knights Stadium, Time

Warner Cable Arena, and Blumenthal. Venues do not require any form of approval to conduct large events on private property; therefore, the City does not charge a fee for these occasions.

Oversized Load Moves

Any vehicles moving through Charlotte that exceed certain size and/or weight restrictions are required to obtain oversized load permits from CDOT. Currently, the City does not receive any revenue for this activity.

News Racks

News racks are not considered "commercial use" because application of the First Amendment.

## Questions from March 26<sup>th</sup> Budget Committee Meeting with County Tax Assessor

**Question 23:** *Please provide additional information on appeals outstanding?*

<b>Outstanding Appeals</b>	<b>Count</b>	<b>Valuation</b>
Commercial	2,796	\$10,164,940,104
Residential	7,052	\$1,708,382,300
<b>Total Open Appeals</b>	<b>9,848</b>	<b>\$11,877,532,104</b>

**Question 24:** *Please provide a breakdown/listing of neighborhoods by major, minor, and acceptable categories?*

Attachment #2 is the list provided by the County Tax Assessor's Office.

**Question 25:** *Please provide additional information on public outreach efforts?*

Attachment #3 is the document provided by the County Tax Assessor's Office.



## MECKLENBURG COUNTY Office of the Assessor

To: City of Charlotte, Budget Committee  
From: Kenneth L Joyner, RES, AAS, Assessor  
CC: Dena Diorio, County Manager  
Mark Foster, Assistant County Manager  
Date: 3/26/2015

**At the request of the City of Charlotte, after meeting with Council Members Edmund H Driggs and Greg Phipps, along with Randy Harrington, Director of Management & Financial Services, I have prepared the following responses to questions posed by the City of Charlotte's Budget Committee.**

**Give a brief history of the 2011 revaluation and subsequent events.**

- January 1, 2011 was the date of Mecklenburg County's last revaluation.
- July of 2012 the BOCC retains Pearson Appraisal Services to provide a "Report on the Review of Mecklenburg County 2011 Property Revaluation"
- November 20, 2012 Pearson Appraisal Services delivers the "Report on the Review of Mecklenburg County 2011 Property Revaluation"
- July 26, 2013 Governor signs into law Session Law 2013-362, the "Revaluation Review" bill.
- August 2, 2013 Mecklenburg County solicits Request for Proposals for a qualified appraisal company to conduct a review of all values in the county by neighborhoods and make recommendations as to the true value of the properties as of January 1 of the year of the last general appraisal performed pursuant to G. S. 105-286.
- September 17, 2013 Pearson Appraisal Services was selected as the party to complete the Revaluation Review.
- October 8, 2013 first of 18 monthly reports is submitted to the BOCC. It included 234 parcels.
- March 3, 2015 18<sup>th</sup> and final report is submitted.
- March 4, 2015 Bill introduced to the North Carolina Senate to make changes to the original bill involving who is responsible for increase bills.

**Where are we in the process? How much value remains to be re-valued? What value is being appealed and what's the timeframe for that? What is the total amount of remaining appeals, in assessed values, within the City of Charlotte?**

The valuation portion of the Revaluation Review is complete. The final report was delivered to the BOCC at their March 3<sup>rd</sup> meeting. What remains is the appeals process, the remaining refunds, and the discovery or increase bills.

As of 3/6 there were 8,633 appeals remaining for the City of Charlotte. The aggregate assessed value of those parcels is in excess of 9.5 Billion. We have included a percentage loss from those appeals in your estimates given to you. We determined that amount using a historical loss in value from Board of Equalization and Review appeals.

**Describe the process of the Revaluation Review, and how the 18-month process evolved?**

To complete the review of approximately 360,000 parcels and over 1,300 neighborhoods in 18 months was a huge undertaking. It took Pearson about four months to get up to speed. Over the 1<sup>st</sup> three months Pearson completed just under 11,000 parcels. In the 4<sup>th</sup> month they reached a more manageable number of 18,559 parcels. They continued at that type of level throughout the remainder of the project, finishing on time.

Pearson, as a part of a previous contract, had identified all of Mecklenburg County neighborhoods as Major, Minor, or Acceptable. The following is how they defined these terms within the Revaluation Review. Major is defined as "instances of inequity or erroneous data were discovered that have a significant impact on the valuation of the neighborhood as a whole". Minor is defined as "instances of inequity or erroneous data were discovered.....did not have a major effect on the overall valuation of the neighborhood as a whole". Acceptable is defined as "the overall valuation of the subject neighborhood is satisfactory based on the scope and procedures of our review". Pearson Appraisal Services worked on major neighborhoods throughout the process. The amount of time for data collection and analysis in the major neighborhoods resulted in the completion of the review for many of those neighborhoods towards the end of the project.

The commercial neighborhoods, as established by the county during the 2011 revaluation, extend from the southernmost part of the county to the most northern portion. Due to the alignment of these neighborhoods they explained that we would receive those neighborhoods in the Fall of 2014. As the Fall approached they continued to need additional time to complete them. The majority of commercial neighborhoods were sent to the BOCC in January, February and March of 2015.

Based upon the time needed to complete the major and commercial neighborhoods, the majority of neighborhoods that were completed during the ramp up period and on through most of 2014 were minor and acceptable neighborhoods. From discussion with Pearson, this was necessary to both complete the project on time and do the proper analysis on the neighborhoods completed towards the end of the project.

All properties have now been reviewed by Pearson Appraisal Service and the values approved by the Board of County Commissioners. We now have a new established tax base, except for changes that may be made during the appeal process and for new construction.

**How confident are you in the work that Pearson's is doing & what is the confidence level or margin of error for data we are now using?**

The Revaluation Review was mandated by the General Assembly. In this legislation, Pearson Appraisal Services was given full authority to value. Their values are delivered to the BOCC for acceptance. The legislation intentionally leaves the Assessor out of the process. Short of a new construction, an appeal, or correction of an error in the physical characteristics of a property, I am not authorized to change a value until the next reappraisal.

**Why was the most recent info so different from what was previously anticipated?**

At the beginning of the FY 14 budget process the county was using a 1% anticipated loss attributable to the Revaluation Review. This was a reduction from 2% that was used in the FY 13 numbers. This number was given to the county through discussions with Pearson Appraisal Services in December of 2013. At that point only 2 or 3 valuation reports had been given to the BOCC. As we moved into the spring and more reports had been delivered we had additional discussions with Pearson's. In April as we were trying to wrap up the assessed valuation estimates over 25% of the parcels had been finalized and the reduction was less than .4%. During our discussions Pearson stated that the reductions appear to be less than they originally estimated and stated that .5% was the new estimate for loss.

**What is occurring in the Municipal Service Districts and why?**

My evaluation of the 5 MSD's is that they have experienced similar changes in their assessed valuation bases as the city and county.

**If 2011 values were incorrect, what do we expect for values today and property tax refunds?**

The special legislation dictated the Revaluation Review process. These values will now be used until the next revaluation in 2018 or 2019. Changes to those values will be limited to appeal findings at the Board of Equalization and Review level or at the State Property Tax Commission, new construction or remodeling, or corrections to the physical characteristics file for the property.

To date the county has processed 216,000 individual, single year refunds. We hope to provide estimates of the remaining refunds soon. The processing of all monthly reports has not been completed, as this process does not typically happen until after the appeal rights have ended. Also the project poses many other obstacles to correctly estimating the numbers. Unfortunately with the speed needed to complete the project many of the enhancements, to our software systems, needed to administer parts of the Revaluation Review were not completed until after the project was started. We will let you know as soon as we have solid estimates.

**When will you start the next revaluation process?**

We have already begun. Below I will highlight our tasks that have already begun.

### ***Field Canvassing/Property Visits***

We started the process of field canvassing all real property in Mecklenburg County last spring. To date we have visited, walked, and remeasured over 60,000 parcels. If you remember there were many discussions about how long it had been since physical property visits had been completed by the County Assessor's Office following the 2011 revaluation. It has been at least 20 years. This is to ensure accuracy in our property characteristics database.

### ***Sales File***

We have completely revamped our sales confirmation process. We are gathering information on all real property sales, both residential and commercial, to better gauge our markets. Having better sales information we help us identify market trends and determine market areas.

### ***Software Upgrade***

Our office will be upgrading our computer system used to value the real property in the next month. The upgrade will provide increased functionality and the ability to start the reappraisal input and analysis now. We will begin entering the data from our field canvassing project in May.

### ***Website Upgrades***

We have added additional website applications that provide our citizens with better information on their property and others. Sales within a neighborhood can be viewed and selected as comparable properties to a subject (citizen's property) based upon size, age, or other similarities. Those results can be saved in a pdf. format or printed. The sales information provided are the sales that the office, and now Pearson, used for their valuations. A citizen can also pick from multiple property attributes and see those items on other properties in their neighborhood without having to select each property. For example, if the customer was interested in what the land values in their neighborhood are they can select land value and just hover their cursor over each property and see the land value of that parcel.

### ***Appeals***

We have purchased a software package that will allow our citizens to submit an appeal on-line. In the above section I discussed the ability to save or print a list of comparable properties for the customer's home. With our package the citizen will then be able to electronically send that information to our office as part of their appeal. The module will allow a customer to communicate with the appraiser working their appeal and submit additional information if needed. Discussions during and after the 2011 revaluation and the appeals process centered on a lack of communication from the county after submittal. The product will give my office the ability a readily answer questions and request additional information.

### ***Neighborhood Delineation***

Our office is working on establishing new neighborhood lines for appraisal purposes. The neighborhood lines establish the sales boundaries for analysis. Accuracy of the neighborhood boundaries leads to consistent and equitable values.

### ***Review of and updating of Construction Grade Classifications***

Our office, as we upgrade our real property valuation software package, are reviewing the way we currently classify properties for appraisal purposes.

March 17, 2015

To: City of Charlotte

From: Mecklenburg County Government

Subject: Reconciliation of the 2014 Property Tax Values – FY15 Estimate to Final

As part of the budget planning cycle, the City of Charlotte receives estimates from the Mecklenburg County Tax Assessor’s Office for property tax values. For fiscal year 2015, the original 2014 Tax Value estimate was \$91.6 billion. The final 2014 Tax Value was \$89.6 billion, \$2.0 billion (2.2%) below the original estimate. This memo will provide a breakdown of the property tax components and an explanation of the differences.

\$ in Millions	City of Charlotte 2014 Tax Value			
	FY 15 Estimate	FY 15 Final	FY15 Final O / (U) FY15 Estimate	
			\$	%
Real Estate	\$ 74,022.0	\$ 73,274.2	\$ -747.8	
Business Personal Property	8,253.1	7,891.7	-361.4	
Public Assessments (State)	2,266.7	1,901.2	-365.5	
Registered Motor Vehicles	6,006.0	6,259.1	253.1	
Individual Personal Property	58.1	57.6	-0.5	
Subtotal	\$ 90,605.9	\$ 89,383.8	\$ -1,222.1	-1.3%
Prior Yr. Audit Discoveries	985.7	220.5	-765.2	
Total	\$ <u>91,591.6</u>	\$ <u>89,604.3</u>	\$ <u>-1,987.3</u>	-2.2%

Real Estate Difference - \$747.8 Million decline

The last three months (January – March, 2015) of the SL362 Revaluation Project caused a significant change to real estate values, both in residential and commercial properties. At the time of the FY15 budget estimate, early appraisal returns and feedback from the independent property appraiser (Pearson) indicated only a 0.5% decline. This was the basis for the FY 15 estimate. To date, the actual decline has risen to 1.5% (\$1.1 billion of reduced value for Charlotte). Almost 60% of the value decline occurred in January and February, 2015. Those months were heavily impacted by commercial property appeal settlements and the complex, neighborhood appraisals completed at the end of the project.

The biggest surprise was in the commercial properties. Pearson had forecast a neutral impact (discoveries would exceed reductions). However, SL362 mandated that Pearson handle the settlement of the backlog of commercial property appeals which grew substantially over previous history. Approximately \$456 million of commercial property reductions were processed in January, 2015 for

Mecklenburg County. The big drop in residential properties appeared in February with approximately \$277 million of net reductions finalized.

Business Personal Property - \$361.5 million decline

Registered Motor Vehicles - \$251.1 million gain

Growth in the registered motor vehicle tax base (increased vehicles and new vehicle purchases) provided a significant offset to the decline in business personal property. The base for registered motor vehicles will continue to grow for FY 2016.

Individual Personal Property - \$500 thousand decline

The decline is within the normal estimation tolerances and not due to a specific event.

Prior Year Audit Discoveries - \$765 million decline

Prior year audit discovery results are very volatile from year to year depending on the types of businesses in the audit pipeline and the materiality of audit findings. The forecast for FY2015 reflects average collections, but this number can be influenced by one-time success. Therefore, in the past the Mecklenburg County budget would use only a portion of any increase in their budget estimates. It is our understanding, however, that this value was not reduced in Charlotte's FY 2015 budget forecast. The assessment base for the FY 2016 was significantly reduced to \$166 million.

# Assessed Value Data Provided by Mecklenburg County

March 2014

Jurisdiction	Prop Type	2013 Tax Value		Highest 2014 Est.		Average 2014 Est.		Lowest 2014 Est.		Growth (Highest)		Growth (Average)	
		Fire Districts	Meck City	Special Districts	Charlotte	Cornelius	Davidson	Huntersville	Matthews	Meck Police	\$	%	\$
Charlotte	BUS	7,846,129,133	8,391,663,625	8,253,131,620	8,114,579,616	543,554,492	405,002,487	6.9%	5.2%	1,144,756	2.0%	1,144,756	2.0%
	IND	56,997,232	60,882,669	58,141,988	55,401,308	3,885,437	88,606,320	6.8%	4.1%	88,606,320	4.1%	88,606,320	4.1%
	PUB	2,177,901,362	2,287,963,014	2,266,507,682	2,245,052,351	110,061,652	(13,242,273)	5.1%	-0.2%	(13,242,273)	-0.2%	(13,242,273)	-0.2%
	RMV	6,019,214,990	6,005,972,717	6,005,972,717	6,005,972,717	2,048,437,679	384,157,756	2.8%	0.5%	384,157,756	0.5%	384,157,756	0.5%
	REI	73,637,906,124	75,686,343,803	74,022,063,880	73,044,223,437	87,161,324	87,161,324	9.7%	9.7%	87,161,324	9.7%	87,161,324	9.7%
	Prior Yr. BUS Audit Discoveries	388,570,351	985,731,675	985,731,675	985,731,675	90,450,961,103	2,779,858,311	3.1%	3.1%	952,830,371	1.1%	952,830,371	1.1%
<b>Charlotte Total</b>		<b>90,638,719,192</b>	<b>93,418,577,502</b>	<b>91,591,549,562</b>	<b>90,450,961,103</b>	<b>2,779,858,311</b>	<b>2,779,858,311</b>	<b>3.1%</b>	<b>3.1%</b>	<b>952,830,371</b>	<b>1.1%</b>	<b>952,830,371</b>	<b>1.1%</b>

March 6<sup>th</sup> 2015

Jurisdiction2	Prop Type	2014 Tax Value	Average 2015 Est.	Avg. Growth %
(All)		7,891,735,782	7,958,159,103	0.8%
CHARLOTTE	BUS	57,638,543	59,269,661	2.8%
	IND	220,515,971	165,513,826	-24.9%
	Prior Yr BUS Audit Discoveries	1,901,200,338	3,008,906,535	58.3%
	PUB	73,274,171,793	73,996,575,013	1.0%
	REI	6,259,088,047	6,634,688,860	6.0%
	RMV	89,604,350,473	91,823,112,998	2.5%
<b>CHARLOTTE Total</b>		<b>89,604,350,473</b>	<b>91,823,112,998</b>	<b>2.5%</b>

## Attachment 2

nbhd	nbhdname	nbhdtype	finaldetermination
A101	LAKE NORMAN	Residential	Major Issues
A108	LAUREL GLEN	Residential	Acceptable
A109	BLUESTONE HARBOR	Residential	Minor Issues
A113	ISLAND FOREST	Residential	Acceptable
A118	BAHIA BAY	Residential	Major Issues
A119	BORDEAUX	Residential	Acceptable
A120	LOOKOUT POINT	Residential	Minor Issues
A121	LAGOONA/RAINBOW	Residential	Major Issues
A122	SHEARWATER/ALICE'S ADDTN	Residential	Major Issues
A123	MADISON VILLAGE	Residential	Acceptable
A127	PRESTON @ THE LAKE	Residential	Minor Issues
A128	BLAKLEY SHORES	Residential	Acceptable
A129	100 NORMAN PLACE	Residential	Acceptable
A131	PENINSULA	Residential	Major Issues
A132	PLAYERS RIDGE / SPRINGWINDS	Residential	Minor Issues
A133	SPINNAKERS REACH	Residential	Acceptable
A134	RIVERCHASE	Residential	Minor Issues
A135	CROWN LAKE	Residential	Acceptable
A136	HERON HARBOR	Residential	Acceptable
A137	BETHELWOOD	Residential	Minor Issues
A138	STERLING PT / THE CAPE	Residential	Major Issues
A139	SOUTHSHORE	Residential	Minor Issues
A140	MCKENZIE	Residential	Acceptable
A141	NORTHPORT	Residential	Minor Issues
A142	CHAPEL POINT	Residential	Acceptable
A143	HARROWGATE	Residential	Acceptable
A144	SOUTHPORT	Residential	Minor Issues
A146	TORRENCE CHAPEL ESTATES	Residential	Acceptable
A147	EMERALD COVE	Residential	Acceptable
A148	JOY'S SERENITY POINT	Residential	Acceptable
A149	SHADOW CREEK	Residential	Acceptable
A301	DAVIDSON AREA	Residential	Acceptable
A310	DAVIDSON / CORNELIUS	Residential	Major Issues
A311	HOLLY TRAIL	Residential	Acceptable
A320	RUNNYMEDE	Residential	Acceptable
A323	MCCONNELL	Residential	Minor Issues
A324	VICTORIA BAY	Residential	Acceptable
A325	HOBBS/MAGNOLIA	Residential	Acceptable
A326	LITTLE GATE	Residential	Acceptable
A327	SPINNAKER	Residential	Acceptable
A328	WOODS @ LAKE DAVIDSON	Residential	Acceptable
A329	LAKE DAVIDSON PARK	Residential	Minor Issues
A330	FAUST	Residential	Acceptable
A501	HWY 73	Residential	Acceptable
A510	WILLOW POND	Residential	Acceptable
A511	OAKHURST	Residential	Acceptable
A512	PINE RIDGE DR AREA	Residential	Acceptable
A513	WELLESLY VILLAGE	Residential	Acceptable
A514	MAGNOLIA ESTATES	Residential	Acceptable
A515	CORNELIUS	Residential	Acceptable
A516	OAKHURST II	Residential	Minor Issues

## Attachment 2

A517		Residential	Acceptable
A518	PSALMS	Residential	Minor Issues
A520	CAMBRIDGE	Residential	Acceptable
A522	GLENRIDGE	Residential	Minor Issues
A523	WESTMORLAND LAKES	Residential	Acceptable
A524		Residential	Acceptable
A525		Residential	Acceptable
A526		Residential	Acceptable
A527	PRESERVE AT ROBBINS PARK	Residential	Acceptable
A528	SOUTH HILL	Residential	Acceptable
A529	GLENASHLEY	Residential	Major Issues
A530	MERIDIAN SECTION	Residential	Acceptable
A551	THE GREENS @ BIRKDALE	Residential	Major Issues
A552	ALEXANDER PLACE	Residential	Acceptable
A701	DAVIDSON / HWY 73 AREA	Residential	Acceptable
A721	PAGE'S POND	Residential	Acceptable
A722	PAT STOUGH / KIMBERLY	Residential	Acceptable
A723	DAVIDSON WOOD	Residential	Acceptable
A724	DAVIDSON COLLEGE AREA	Residential	Minor Issues
A726	SUMMERS WALK	Residential	Acceptable
A727	SUMMERS WALK - MATTANY SECTION	Residential	Acceptable
A730	RIVER RUN	Residential	Acceptable
A731	NH@BRADFORD	Residential	Acceptable
A732	PARK PLACE @ DAVIDSON	Residential	Acceptable
A733	CORNELIUS TOD	Residential	Minor Issues
A734	WOODLANDS AT DAVIDSON	Residential	Acceptable
A736	POETRY LANE SECTION (RIVER RUN)	Residential	Major Issues
A737	TWIN OAKS	Residential	Acceptable
A738	BAILEY'S GLEN	Residential	Acceptable
A739	BOULDER ROCK	Residential	Acceptable
A901	/-77/STUMPTOWN RD AREA	Residential	Acceptable
A902	MACCALAUY FARMS	Residential	Acceptable
A903	TOOLEY	Residential	Acceptable
A904	GILEAD RIDGE	Residential	Acceptable
A905	WATERFRONT	Residential	Acceptable
A910	NORMAN'S SHORES	Residential	Acceptable
A911	WYNFIELD II	Residential	Acceptable
A912	BRECKENRIDGE	Residential	Acceptable
A913		Residential	Minor Issues
A914	HARVEST POINTE	Residential	Acceptable
A921	WYNFIELD I	Residential	Acceptable
A925	GREEN FARM	Residential	Minor Issues
A926	BIRKDALE EAST	Residential	Acceptable
A930	HAMPTONS	Residential	Acceptable
A931	REGENCY PARK	Residential	Acceptable
A933	MCCAULEY FARMS	Residential	Acceptable
A934	AUTUMN COVE	Residential	Acceptable
A935		Residential	Acceptable
A936		Residential	Acceptable
A937		Residential	Acceptable
A938		Residential	Acceptable
AP01	MF - DOWNTOWN SUBMARKET	COMMERCIAL	Major Issues

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AP02	MF - EAST-1 SUBMARKET	COMMERCIAL	Major Issues
AP03	MF - EAST-2 SUBMARKET	COMMERCIAL	Major Issues
AP04	MF - EAST-3 SUBMARKET	COMMERCIAL	Major Issues
AP05	MF - NORTH SUBMARKET	COMMERCIAL	Major Issues
AP06	MF - NORTHEAST-1 SUBMARKET	COMMERCIAL	Major Issues
AP07	MF - NORTHEAST-2 SUBMARKET	COMMERCIAL	Major Issues
AP08	MF - NORTHEAST-3 SUBMARKET	COMMERCIAL	Major Issues
AP09	MF - NORTHWEST SUBMARKET	COMMERCIAL	Major Issues
AP10	MF - SOUTHEAST-1 SUBMARKET	COMMERCIAL	Major Issues
AP11	MF - SOUTHEAST-2 SUBMARKET	COMMERCIAL	Major Issues
AP12	MF - SOUTHEAST-3 SUBMARKET	COMMERCIAL	Major Issues
AP13	MF - SOUTHWEST-1 SUBMARKET	COMMERCIAL	Major Issues
AP14	MF - SOUTHWEST-2 SUBMARKET	COMMERCIAL	Major Issues
B101	RURAL BOOK 011	Residential	Acceptable
B111	WILLOW BROOK	Residential	Acceptable
B120	NORTHSTONE	Residential	Acceptable
B121	SHELTON RIDGE	Residential	Acceptable
B122	CEDAR POND	Residential	Acceptable
B123	KANE RIDGE	Residential	Acceptable
B301	MOUNTAIN ISLE AREA	Residential	Acceptable
B302	PAMELA	Residential	Major Issues
B310	MCGINNIS	Residential	Major Issues
B311	DOUGLAS PARK	Residential	Acceptable
B312	STEVENS GROVE	Residential	Acceptable
B313	WINDING RIDGE	Residential	Minor Issues
B314	HASTINGS FARM	Residential	Minor Issues
B315	CASHION WOOD	Residential	Minor Issues
B316	STILLWELL	Residential	Minor Issues
B317	RIVERDALE	Residential	Acceptable
B501	COMM	Residential	Minor Issues
B506		Residential	Acceptable
B507	TANNERS CREEK	Residential	Minor Issues
B508	ROLLING MEADOWS	Residential	Major Issues
B509	CAMBRIDGE/ALSTON FOREST	Residential	Acceptable
B510	HENDERSON PARK/GLENCREEK	Residential	Acceptable
B511	CEDARFIELD	Residential	Acceptable
B512	GILEAD VILLAGE	Residential	Acceptable
B513		Residential	Acceptable
B514	HAMBRIGHT WOODS	Residential	Acceptable
B515	GLENCREEK	Residential	Acceptable
B516	TITAN SECTION	Residential	Acceptable
B517	BINNAWAY SECTION	Residential	Minor Issues
B518	SAO PAULA	Residential	Acceptable
B519	ALSTON FOREST	Residential	Minor Issues
B520	ARBORMERE	Residential	Acceptable
B701	I-77 / OLD STATESVILLE RD	Residential	Minor Issues
B702	WALDEN LEA	Residential	Major Issues
B704	ALEXANDER PLACE	Residential	Acceptable
B710	HUNTERSVILLE	Residential	Minor Issues
B711	HAMBRIGHT/MCCOY	Residential	Minor Issues
B712	SHEPARD'S VINEYARD	Residential	Minor Issues
B713	NOTTINGHAM	Residential	Minor Issues

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B714	PLUM CREEK	Residential	Minor Issues
B715	MELBOURNE/NEW	Residential	Acceptable
B716	STONE HOLLOW	Residential	Acceptable
B718	VILLAGE OF ROSEDALE	Residential	Acceptable
B719	MONTIETH (MIXED)	Residential	Acceptable
B720	KERN MEADOW	Residential	Minor Issues
B721	LOTTINGLY SECTION	Residential	Acceptable
B722	MEADOWMERE	Residential	Acceptable
B901	HUNTERSVILLE-EAST	Residential	Acceptable
B910	CROWN RIDGE	Residential	Acceptable
B912	S / W HUNTERSVILLE	Residential	Minor Issues
B913	OLD VERMILLION	Residential	Minor Issues
B914	GARDEN DISTRICT	Residential	Acceptable
B915	CENTENNIAL COMMONS	Residential	Minor Issues
B916	VERMILLION II	Residential	Acceptable
B917	VERMILLION III	Residential	Acceptable
B918	THE PAVILION	Residential	Acceptable
B919		Residential	Acceptable
B920	BRYTON	Residential	Acceptable
B921	MIRABELLA	Residential	Acceptable
C101	HUNTERSVILLE / CONCORD RD	Residential	Minor Issues
C102	SKYBROOK	Residential	Minor Issues
C103	SKYBLUFF SECTION	Residential	Acceptable
C104	OLMSTEAD	Residential	Acceptable
C110	MCGINNIS VILLAGE	Residential	Acceptable
C111	SKYBROOK II	Residential	Minor Issues
C301	MOUNTAIN ISLAND	Residential	Minor Issues
C320	MOUNTAIN POINT	Residential	Minor Issues
C321	LATTA SPRINGS	Residential	Acceptable
C330	OVERLOOK	Residential	Minor Issues
C501	I-77/REAMES RD	Residential	Major Issues
C502	FRANK VANCE	Residential	Acceptable
C510	TREYBURN / WOODFORD / GAITWOOD	Residential	Minor Issues
C511		Residential	Acceptable
C512		Residential	Acceptable
C513		Residential	Acceptable
C514		Residential	Minor Issues
C515		Residential	Acceptable
C516	BELMONT STABLES	Residential	Acceptable
C517	BROOKLINE	Residential	Acceptable
C519	DAISYBEE	Residential	Acceptable
C701	MALLARD CREEK AREA	Residential	Minor Issues
C708		Residential	Acceptable
C710	LOWEN	Residential	Acceptable
C711	CHESHUNT	Residential	Acceptable
C712	HARRIS POINTE / MALLARD RID	Residential	Acceptable
C714	MALLARD TRACE	Residential	Acceptable
C715	WINCHESTER / FOXCHASE / AVON FARM	Residential	Acceptable
C716	EASTFIELD RD	Residential	Acceptable
C718	ROLLING OAK / BRYNMOOR / NEW SUB	Residential	Minor Issues
C720	DOWNING CREEK / CHESTNUT KNOLL	Residential	Minor Issues
C721	MALLARD GROVE / BROOKSTONE	Residential	Minor Issues

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C723	SWEETBRIAR	Residential	Acceptable
C724	COLVARD PARK	Residential	Acceptable
C727	DAVIS LAKE / BRIDLE RIDGE / DAVIS RIDGE	Residential	Acceptable
C936	FOUNTAIN GROVE II	Residential	Minor Issues
C937	CHATHAM	Residential	Acceptable
C938	ACORN CREEK	Residential	Acceptable
C939	EASTFIELD VILLAGE	Residential	Acceptable
C940		Residential	Minor Issues
C941	MALLARD WOODS	Residential	Acceptable
C942	LEGOLAS	Residential	Acceptable
C943	BALSAM TREE	Residential	Acceptable
C944	HIGHLAND PARK	Residential	Acceptable
C730	RADBOURNE / FRENCH WOODS	Residential	Minor Issues
C731	HARRINGTON WOODS	Residential	Minor Issues
C736	HAMPTON PLACE	Residential	Minor Issues
C737	SPRING PARK	Residential	Acceptable
C739	EAGLE RIDGE	Residential	Minor Issues
C740	AMBER LEIGH	Residential	Acceptable
C741	MALLARD RIDGE/PLOVER	Residential	Acceptable
C742	DERVISH	Residential	Acceptable
C743	LOWER CANIPE/TWISTED PINE	Residential	Acceptable
C744	WOODFIRE	Residential	Minor Issues
C745	MERIDALE-THE WOODLANDS	Residential	Minor Issues
C746	GATEWAY	Residential	Acceptable
C747	ELEMENTARY VIEW	Residential	Acceptable
C748	HUBBARD FALLS	Residential	Acceptable
C749	SWEETBRIAR	Residential	Acceptable
C750	STONE PARK	Residential	Acceptable
C751	FAIRLEA	Residential	Acceptable
C752	AVALON FOREST	Residential	Acceptable
C753	FOGGY MEADOW	Residential	Acceptable
C754	LONG FOREST/SUMMER CREEK SECTION	Residential	Acceptable
C755	FOX GLEN/RED TAIL	Residential	Acceptable
C756	WHITE ASPEN/GREEN HEDGE	Residential	Acceptable
C757		Residential	Acceptable
C758	AMBER GLEN	Residential	Acceptable
C759	BROWNSTONE VIEW	Residential	Acceptable
C760	PASSOUR RIDGE	Residential	Acceptable
C761	TOWERING PINES	Residential	Acceptable
C901	HWY 29	Residential	Minor Issues
C902	STONEY CREEK / QUAIL RIDGE	Residential	Acceptable
C903	WITHROW DOWNS 1	Residential	Minor Issues
C904	ARBOR CREEK / LAUREL RUN	Residential	Acceptable
C905	BREEZEWOOD DR AREA	Residential	Major Issues
C906	APPLEDALE	Residential	Acceptable
C907	HARBURN FOREST / BELLS MILL / HGLND	Residential	Minor Issues
C908	TURNBERRY / STONEY CREEK / PROSPE	Residential	Acceptable
C909	WITHROW DOWNS II	Residential	Acceptable
C910	WITHROW DOWNS	Residential	Minor Issues
C911	BASKERVILLE / HIGHCROFT	Residential	Acceptable
C912	HATTIE MEADOWS I	Residential	Acceptable
C913	ROBYN'S GLEN	Residential	Acceptable

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C914	STONEY CREEK I	Residential	Acceptable
C915	EASTFIELD	Residential	Minor Issues
C916	PROSPERITY RIDGE	Residential	Acceptable
C917	KALISPELL	Residential	Minor Issues
C918	FALCAM	Residential	Major Issues
C919	DOMINION BLUFF	Residential	Acceptable
C920	RIDGEFIELD	Residential	Acceptable
C921	CROWN VISTA	Residential	Minor Issues
C922	MCCHESENEY / GRABURN'S FORD	Residential	Minor Issues
C923	MAPLELEAF	Residential	Acceptable
C924	ATWATER	Residential	Major Issues
C925	COPPERS RIDGE	Residential	Acceptable
C926	SIMONTON	Residential	Acceptable
C927	MALLARD LAKE	Residential	Acceptable
C928	DOMINION GREEN	Residential	Acceptable
C930	CLAYBROOKE / LEXINGTON	Residential	Major Issues
C931	MEADOWMONT	Residential	Acceptable
C932	LAUREL RUN	Residential	Major Issues
C933		Residential	Acceptable
C934	STONEY CREEK / GARRISON	Residential	Minor Issues
C935	SIMPSON PLACE	Residential	Minor Issues
CC01	CONDO, COMMERCIAL - DOWNTOWN	COMMERCIAL	To Be Reviewed
CC02	CONDO, COMMERCIAL - EAST	COMMERCIAL	Major Issues
CC03	CONDO, COMMERCIAL - INNER SOUTH	COMMERCIAL	To Be Reviewed
CC04	CONDO, COMMERCIAL - OUTER SOUTH	COMMERCIAL	To Be Reviewed
CC07	CONDO, COMMERCIAL - NORTH	COMMERCIAL	Major Issues
CC08	CONDO, COMMERCIAL - NORTHEAST	COMMERCIAL	To Be Reviewed
CO01	CONDO, OFFICE - DOWNTOWN	COMMERCIAL	To Be Reviewed
CO02	CONDO, OFFICE - MIDTOWN	COMMERCIAL	To Be Reviewed
CO03	CONDO, OFFICE - I-77 / SOUTHWEST	COMMERCIAL	To Be Reviewed
CO04	CONDO, OFFICE - PARK ROAD	COMMERCIAL	To Be Reviewed
CO05	CONDO, OFFICE - SOUTH PARK	COMMERCIAL	To Be Reviewed
CO06	CONDO, OFFICE - COTSWOLD	COMMERCIAL	To Be Reviewed
CO07	CONDO, OFFICE - NC51 / SOUTHEAST	COMMERCIAL	To Be Reviewed
CO08	CONDO, OFFICE - EAST	COMMERCIAL	To Be Reviewed
CO09	CONDO, OFFICE - NORTHEAST	COMMERCIAL	Minor Issues
CO10	CONDO, OFFICE - NORTH	COMMERCIAL	Minor Issues
CO11	CONDO, OFFICE - INDEPENDENCE BV / M	COMMERCIAL	Minor Issues
CR02	CONDO, RESIDENTIAL - LAKE NORMAN -	Residential	Acceptable
CR03	CONDO, RESIDENTIAL - LAKE NORMAN -	Residential	Acceptable
CR04	CONDO, RESIDENTIAL - LAKE NORMAN -	Residential	Acceptable
CR05	Condo, Residential - Lake Norman Excellent	Residential	Acceptable
CR12	CONDO, RESIDENTIAL - NORTH MECKLEI	Residential	Acceptable
CR13	CONDO, RESIDENTIAL - NORTH MECKLEI	Residential	Acceptable
CR14	CONDO, RESIDENTIAL - NORTH MECKLEI	Residential	Acceptable
CR22	CONDO, RESIDENTIAL - UNIVERSITY - AV	Residential	Minor Issues
CR23	CONDO, RESIDENTIAL - UNIVERSITY - GC	Residential	Acceptable
CR31	CONDO, RESIDENTIAL - WEST - BELOW A	Residential	Acceptable
CR32	CONDO, RESIDENTIAL - WEST - AVERAGI	Residential	Minor Issues
CR42	CONDO, RESIDENTIAL - DOWNTOWN - AV	Residential	Acceptable
CR43	CONDO, RESIDENTIAL - DOWNTOWN - GC	Residential	Minor Issues
CR44	CONDO, RESIDENTIAL - DOWNTOWN - VE	Residential	Acceptable

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CR45	CONDO, RESIDENTIAL - DOWNTOWN - E	Residential	Acceptable
CR46	CONDO, RESIDENTIAL - DOWNTOWN - C	Residential	Acceptable
CR52	CONDO, RESIDENTIAL - NORTH CHARLO	Residential	Acceptable
CR62	CONDO, RESIDENTIAL - EAST - AVERAGE	Residential	Acceptable
CR63	CONDO, RESIDENTIAL - EAST - GOOD	Residential	Acceptable
CR64	CONDO, RESIDENTIAL - EAST - VG	Residential	Acceptable
CR72	CONDO, RESIDENTIAL - SOUTH - AVERAC	Residential	Acceptable
CR73	CONDO, RESIDENTIAL - SOUTH - GOOD	Residential	Acceptable
CR74	CONDO, RESIDENTIAL - SOUTH - VERY G	Residential	Acceptable
CR75	CONDO, RESIDENTIAL - SOUTH - EXCELL	Residential	Acceptable
CR76	CONDO, RESIDENTIAL - SOUTH - CUSTOM	Residential	Acceptable
CR82	CONDO, RESIDENTIAL - SOUTHWEST - A	Residential	Acceptable
CR83	CONDO, RESIDENTIAL - SOUTHWEST - G	Residential	Acceptable
CR92	CONDO, RESIDENTIAL - SOUTH MECKLE	Residential	Acceptable
CR93	CONDO, RESIDENTIAL - SOUTH MECKLE	Residential	Acceptable
CR94	CONDO, RESIDENTIAL - SOUTH MECKLE	Residential	Acceptable
CW01	CONDO, WAREHOUSE - CENTRAL	COMMERCIAL	To Be Reviewed
CW02	CONDO, WAREHOUSE - EAST	COMMERCIAL	To Be Reviewed
CW04	CONDO, WAREHOUSE - SOUTHWEST	COMMERCIAL	To Be Reviewed
CW05	CONDO, WAREHOUSE - NORTHWEST	COMMERCIAL	Minor Issues
CW06	CONDO, WAREHOUSE - NORTH	COMMERCIAL	To Be Reviewed
CW07	CONDO, WAREHOUSE - NORTHEAST	COMMERCIAL	To Be Reviewed
CW08	CONDO, WAREHOUSE - MATTHEWS	COMMERCIAL	To Be Reviewed
D101	COULWOOD AREA / MT HOLLY RD	Residential	Minor Issues
D104	RIVERSIDE	Residential	Minor Issues
D108	EARNEY	Residential	Major Issues
D109	CATAWBA PLANTATION	Residential	Acceptable
D110	FALLS BRANCH	Residential	Minor Issues
D111	NORTHWOODS FOREST	Residential	Major Issues
D112	CEDAR MILLS	Residential	Minor Issues
D113	STONEY POINTE	Residential	Acceptable
D114	PECANWOOD	Residential	Acceptable
D115	COULWOOD	Residential	Minor Issues
D116	MERRILY LANE	Residential	Acceptable
D117	STONEYRIDGE	Residential	Minor Issues
D118	LONG CREEK PARKWAY	Residential	Minor Issues
D119	CARVER FALLS	Residential	Acceptable
D120	COULWOOD AREA / MT HOLLY	Residential	Acceptable
D121	MT. ISLE HARBOR	Residential	Minor Issues
D122	STRATFORD POND	Residential	Acceptable
D123	RIVERBEND	Residential	Acceptable
D124	HARDWOOD LANDING	Residential	Major Issues
D301	LONG CREEK	Residential	Minor Issues
D310	CLAIBORNE WOODS	Residential	Major Issues
D311	CHASTAIN PARK	Residential	Acceptable
D313	RUZUMNY RIDGE	Residential	Minor Issues
D314	MIRANDA	Residential	Minor Issues
D315	RANCHVIEW	Residential	Acceptable
D316	WESTON WOODS	Residential	Acceptable
D317	LAWINGS POND	Residential	Acceptable
D318	STONEDALE COURT	Residential	Acceptable
D319		Residential	Acceptable

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D320	SIMPSON RD/PARGO	Residential	Major Issues
D321	PRIMROSE	Residential	Acceptable
D389	RURAL OAKDALE AREA	Residential	Major Issues
D501	VALLEYDALE / PLEASANTGROVE	Residential	Acceptable
D511	WESTBOURNE	Residential	Major Issues
D513	OAKDALE GREEN	Residential	Minor Issues
D514	GLENHAVEN	Residential	Minor Issues
D515	VALLEYDALE/PLEASANTGROVE	Residential	Acceptable
D516	RAVEN RIDGE	Residential	Acceptable
D518		Residential	Major Issues
D520	FOX CROSSING	Residential	Acceptable
D521	JORDANS POND	Residential	Acceptable
D522		Residential	Major Issues
D523	PLUMCREST	Residential	Minor Issues
D524	PINEBROOK	Residential	Acceptable
D525	PATRICIA RYAN	Residential	Acceptable
D526	OAKSHIRE	Residential	Major Issues
D527	WICKED OAK	Residential	Acceptable
D589		Residential	Minor Issues
D701	REAMES RD / TRINITY RD	Residential	Major Issues
D702	LABORDE SECTION	Residential	Major Issues
D710	RADIO RD	Residential	Major Issues
D711	KINGHURST AREA	Residential	Major Issues
D712	FELDBANK	Residential	Minor Issues
D713	SOUTHMINSTER	Residential	Acceptable
D714	OAKBLUFF	Residential	Acceptable
D715	BROOKFIELD POINT	Residential	Acceptable
D716	LUKES DR SECTION	Residential	Minor Issues
D718	CRAVEN HILL	Residential	Acceptable
D719	POINT AT OAKDALE	Residential	Acceptable
D720	HYDE PARK AREA	Residential	Major Issues
D721	HAMILTON FOREST	Residential	Minor Issues
D722	SUNSET VILLAGE	Residential	Acceptable
D723	WOODLANDS POINTE	Residential	Acceptable
D724	AUTUMN OAK	Residential	Acceptable
D725	ELIZABETH OAKS	Residential	Acceptable
D726		Residential	Minor Issues
D727		Residential	Acceptable
D728		Residential	Acceptable
D729	HENDERSON OAKS	Residential	Acceptable
D730	LINDA VISTA/KIEV	Residential	Acceptable
D731	KEENER CREEK	Residential	Acceptable
D732	HENDRICKS CHAPEL	Residential	Acceptable
D733	SILVER GARDEN	Residential	Minor Issues
D734	LINDEN RIDGE	Residential	Acceptable
D735	BUDDY HOLLY	Residential	Acceptable
D736	FREEBIRD	Residential	Minor Issues
D737	BROOKFIELD PONTE	Residential	Acceptable
D738	LAKE VISTA	Residential	Acceptable
D739		Residential	Minor Issues
D740	VICTORIA SECTION	Residential	Major Issues
D901	BEATTIES FORD RD / HOSKINS	Residential	Minor Issues

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D902	BRADEN	Residential	Minor Issues
D904	STEWARTS GLEN	Residential	Acceptable
D905	TOUCH-ME-NOT/MCCORD	Residential	Acceptable
D906		Residential	Acceptable
D907	GRASS HOLLOW	Residential	Acceptable
D911	PEACHTREE HILLS	Residential	Acceptable
D912	GRIERS GROVE	Residential	Major Issues
D913		Residential	Acceptable
D914	ROCKWOOD	Residential	Major Issues
D915	CLOUDMAN SECTION	Residential	Major Issues
D916	CAPPS HOLLOW	Residential	Acceptable
D917	MILAN/FIRESTONE/DEDMON	Residential	Major Issues
D919	BARLEY GREENS	Residential	Acceptable
E101	I-77 / I-85 / CINDY LN AREA	Residential	Minor Issues
E110	SUNSTONE	Residential	Minor Issues
E111	RICHFIELD	Residential	Acceptable
E112	HAMILTON OAKS	Residential	Acceptable
E113	SUNTRACE	Residential	Acceptable
E114	MILHAVEN	Residential	Acceptable
E115	DELLINGER HAMILTON AREA	Residential	Major Issues
E119	JUNIPER IREDELL AREA	Residential	Minor Issues
E120	SLATER RIDGE	Residential	Minor Issues
E121	MEADOWHILL	Residential	Major Issues
E122	CINDY CREEK	Residential	Acceptable
E123	ESMERALDA	Residential	Acceptable
E301	CHESHIRE RD	Residential	Acceptable
E302	WOODSTONE	Residential	Acceptable
E303	POTTER	Residential	Acceptable
E304	CHRISTENBURY HILLS	Residential	Acceptable
E305	RAVENSWOOD	Residential	Minor Issues
E313	SCOTSBOROUGH	Residential	Major Issues
E314	OAK KNOLL / HUBBARD WOODS / GLENV	Residential	Acceptable
E315	MALLARD PARK	Residential	Acceptable
E316	COCHRAN FARMS	Residential	Acceptable
E317	CRISFIELD	Residential	Acceptable
E318	CHASEWIND / STONEFIELD	Residential	Acceptable
E319	MALLARD FOREST	Residential	Acceptable
E320	OAKBROOKE	Residential	Acceptable
E321	FOX POINT/PANGLEMONT	Residential	Acceptable
E322		Residential	Acceptable
E323	CHASEWIND	Residential	Minor Issues
E324		Residential	Acceptable
E325	RUBIN LURA	Residential	Acceptable
E326	OSCEOLA/REINBECK	Residential	Acceptable
E327	STARMOUNT	Residential	Major Issues
E328	HOWARD/WOODARD SECTION	Residential	Major Issues
E329	GREY DOGWOOD	Residential	Minor Issues
E389	DERITA AREA	Residential	Major Issues
E501	I-85 / STATESVILLE RD	Residential	Acceptable
E502	CRATER PARK	Residential	Major Issues
E508	SPRING TERRACE	Residential	Minor Issues
E509	DALECREST DR AREA	Residential	Minor Issues

Attachment 2

E510	DERITA / ALLEN HILLS	Residential	Minor Issues
E511	FAIRSTONE	Residential	Acceptable
E512	GRENELEFE VILLAGE	Residential	Minor Issues
E513	NEVINBROOK	Residential	Minor Issues
E514	ATLAS DRIVE / TRACEY GLEN	Residential	Minor Issues
E515	FAIRSTONE	Residential	Minor Issues
E516	POPLAR SPRINGS AREA	Residential	Minor Issues
E517	DEVONGATE	Residential	Acceptable
E518	ALLEN ROAD AREA	Residential	Acceptable
E519	KELSEY EMMA	Residential	Major Issues
E520	NEVIN GLEN	Residential	Minor Issues
E521	THE CROSS	Residential	Acceptable
E523	LESLIE BROOKE	Residential	Acceptable
E525	BELMAR PLACE	Residential	Acceptable
E526	GRAYPARK	Residential	Acceptable
E701	MALLARD CREEK / I-85 AREA	Residential	Minor Issues
E702	CYPRESS RIDGE	Residential	Acceptable
E710	MINERAL SPRINGS AREA	Residential	Minor Issues
E713	GREAT OAKS AREA	Residential	Acceptable
E715	HEMBY WOODS	Residential	Acceptable
E716	FOREST POND	Residential	Acceptable
E717	SPRINGWOODS	Residential	Acceptable
E720	GLEN WATER DR AREA	Residential	Major Issues
E901	AUTUMNWOOD / KNOLLWOOD	Residential	Major Issues
E909	OLDE CONCORD	Residential	Major Issues
E910	OWEN / FARMFIELD	Residential	Minor Issues
E912	MARY ALEXANDER	Residential	Minor Issues
E913	BONNIE LN AREA	Residential	Minor Issues
E914	KNOLLWOOD	Residential	Major Issues
E915	AUTUMNWOOD	Residential	Acceptable
E918	CHUCK-NEW	Residential	Acceptable
E920	NEWELL PLACE	Residential	Acceptable
E921	STOURBRIDGE LION	Residential	Acceptable
E922	CRAB ORCHARD	Residential	Minor Issues
E923	LAUREN VILLAGE	Residential	Minor Issues
F101	HARRIS HOUSTON RD AREA	Residential	Major Issues
F102	THE RESERVE@BACK CREEK	Residential	Acceptable
F108	ASHLEY MEADOWS	Residential	Minor Issues
F109	CALDWELL-I485	Residential	Major Issues
F110	WEXFORD	Residential	Major Issues
F111	FAIRES FARM	Residential	Acceptable
F112	PICKEREL	Residential	Major Issues
F115	HELLEBORE	Residential	Acceptable
F117	ROUNDLEAF	Residential	Acceptable
F119	WYNDHAM HILL	Residential	Acceptable
F120		Residential	Acceptable
F122	OLD STONE CROSSING II	Residential	Acceptable
F123	VILLAGE @ BRIERFIELD	Residential	Acceptable
F301	MT HOLLY RD AREA	Residential	Minor Issues
F302	BELMEADE GREEN	Residential	Minor Issues
F310	HARBOR DRIVE AREA	Residential	Acceptable
F311	S LAKEBROOK DR AREA	Residential	Acceptable

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F312	CLEARWOOD OFF MOORE`S CH	Residential	Minor Issues
F313	THE RAPIDS	Residential	Major Issues
F501	MOORE`S PARK	Residential	Minor Issues
F509	MOORES CHAPEL RD	Residential	Major Issues
F510	PAWTUCKETT	Residential	Minor Issues
F511	S/D PAWTUCKETT	Residential	Minor Issues
F512	MOORES CHAPEL RD AREA	Residential	Acceptable
F513	HUNTLYNN	Residential	Acceptable
F515	TUCKASEEGEE	Residential	Acceptable
F516	WALDON PARK	Residential	Major Issues
F701	WESTCHESTER	Residential	Minor Issues
F702	TODD RD (NEW)	Residential	Minor Issues
F703	WINDY RIDGE	Residential	Minor Issues
F710	WESTCHESTER	Residential	Minor Issues
F711	MELYNDA	Residential	Acceptable
F712	EAGLES LAKE	Residential	Major Issues
F713	SUMMIT HILLS (NEW)	Residential	Acceptable
F714	ENEIDA	Residential	Major Issues
F715	SAMARITAN	Residential	Acceptable
F901	PAW CREEK	Residential	Acceptable
F910	CHESHIRE RD / BRADFORD AREA	Residential	Minor Issues
F911	LITTLE ROCK RD AREA	Residential	Minor Issues
F912	MARIA CHRISTINA	Residential	Acceptable
F916	ELMWOOD CIRCLE	Residential	Major Issues
F917	TODDVILLE RD AREA	Residential	Major Issues
G101	WESTERLY HILLS / ASHLEY PK	Residential	Minor Issues
G110	WESTERLY HILLS / ASHLEY PK	Residential	Acceptable
G111	ASHLEY RIDGE	Residential	Acceptable
G112	REID MEADOWS	Residential	Minor Issues
G113	LOST BOY	Residential	Acceptable
G301	ROZZELLES FERRY ROAD AREA	Residential	Acceptable
G305	HOSKINS	Residential	Major Issues
G310	THOMASBORO	Residential	Minor Issues
G501	ROZZELLE`S FERRY RD	Residential	Acceptable
G510	ENDERLY PARK	Residential	Minor Issues
G511	GLENWOOD	Residential	Acceptable
G701	WEYLAND HOMES / FREEDOM DR	Residential	Acceptable
G710	CAMP GREENE AREA	Residential	Acceptable
G901	ROZZELLES FERRY RD AREA	Residential	Acceptable
G905	BEATTIES FORD RD AREA	Residential	Major Issues
G906	BROOKSHIRE BV AREA	Residential	Minor Issues
G907	UNIV PARK BEATTIES FORD RD	Residential	Major Issues
GOLF	GOLF COURSES	COMMERCIAL	To Be Reviewed
H105	WESLEY HEIGHTS	Residential	Major Issues
H301	THIRD WARD	Residential	Acceptable
H509	BEATTIES FORD RD AREA	Residential	Minor Issues
H510	THE PARK @OAKLAWN	Residential	Acceptable
H702	JUSTICE AV AREA	Residential	Major Issues
H801	W 5TH/W TRADE AREA	Residential	Acceptable
H810	OAKLAWN AREA	Residential	Minor Issues
H811	PINE&8TH	Residential	Major Issues
H905	DRUID HILLS	Residential	Major Issues

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H906	SYLVANIA AV AREA	Residential	Major Issues
HOTE	HOTEL - ECOMOMY	COMMERCIAL	Major Issues
HOTF	HOTEL - FULL SERVICE	COMMERCIAL	Major Issues
HOTH	HOTEL - HI-RISE	COMMERCIAL	Major Issues
HOTL	HOTEL - LIMITED SERVICE	COMMERCIAL	Major Issues
I001	COMM/DOWNTOWN	Residential	Minor Issues
I002	HAWTHORNE	Residential	Acceptable
I104	VILLA HEIGHTS	Residential	Major Issues
I105	SEIGLE AV / PARKWOOD AV	Residential	Major Issues
I106	VILLA HEIGHTS I	Residential	Major Issues
I301		Residential	Acceptable
I501	GRIMES ST AREA	Residential	Minor Issues
I701	CRAIGHEAD / SUGAR CRK	Residential	Major Issues
I710	NORTHAVEN DR AREA	Residential	Major Issues
I711	FARMCREST DR AREA	Residential	Major Issues
I712	HUNSLET	Residential	Acceptable
I713	ALEXANDER PARK	Residential	Acceptable
I901	N TRYON / SUGAR CREEK AREA	Residential	Major Issues
I910	HIDDEN VALLEY	Residential	Major Issues
I911	HUNTERBROOK	Residential	Major Issues
IN01	INDUSTRIAL - CENTRAL SUBMARKET	COMMERCIAL	Major Issues
IN02	INDUSTRIAL - EAST SUBMARKET	COMMERCIAL	To Be Reviewed
IN03	INDUSTRIAL - SOUTHEAST SUBMARKET	COMMERCIAL	To Be Reviewed
IN04	INDUSTRIAL - SOUTHWEST SUBMARKET	COMMERCIAL	Major Issues
IN05	INDUSTRIAL - NORTHWEST SUBMARKET	COMMERCIAL	Major Issues
IN06	INDUSTRIAL - NORTH SUBMARKET	COMMERCIAL	Major Issues
IN07	INDUSTRIAL - NORTHEAST SUBMARKET	COMMERCIAL	Major Issues
IN08	INDUSTRIAL - CROWN POINT / MATTHEW	COMMERCIAL	Major Issues
J101	NORTH CHARLOTTE	Residential	Major Issues
J102	BEVERLY HILLS-MIDWOOD LITE	Residential	Minor Issues
J110	CURTISWOOD AREA	Residential	Acceptable
J112	ACADEMY ST AREA	Residential	Minor Issues
J113	THE ARTS DISTRICT	Residential	Major Issues
J114	MATHESON/HOLT	Residential	Major Issues
J301	THE PLAZA	Residential	Acceptable
J311	PLAZA LITE	Residential	Acceptable
J312	DUNLAVIN / SANDHURST	Residential	Major Issues
J313	SHAMROCK / EASTWOOD / HILLARD	Residential	Major Issues
J501	PLAZA / MIDWOOD	Residential	Acceptable
J502	SABLEWOOD	Residential	Acceptable
J503	COUNTRY CLUB	Residential	Minor Issues
J504	LOGIE/MASONIC	Residential	Minor Issues
J510	CENTRAL / EASTWAY AREA	Residential	Major Issues
J511	MIDWOOD	Residential	Major Issues
J513	MIDWOOD II	Residential	Major Issues
J515	MIDWOOD/COUNTRY CLUB	Residential	Minor Issues
J701	THE PLAZA AREA	Residential	Minor Issues
J702	DECAPOLIS	Residential	Major Issues
J703	NORTH RIDGE	Residential	Minor Issues
J710	HUNTERS CROSSING / NEWELL ACRES	Residential	Acceptable
J711	COVECREEK / EASTBROOK WOODS	Residential	Minor Issues
J901	LAKE PLAZA / SHANNON PARK	Residential	Major Issues

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J902	SHAMROCK HILLS	Residential	Major Issues
J903	HOPE VALLEY	Residential	Major Issues
J910	SHAMROCK / EASTWAY DR AREA	Residential	Major Issues
J911	SHANNON PARK / SHAMROCK AREA	Residential	Minor Issues
J912	KIMMERLY GLEN AREA	Residential	Major Issues
J913	CITISIDE	Residential	Acceptable
J914	PLAZA PARK	Residential	Acceptable
K101	WINDSOR PARK	Residential	Major Issues
K102	MEDFORD	Residential	Major Issues
K103	MARKHAM	Residential	Major Issues
K109	SUDBURY/DARBY ACRES	Residential	Major Issues
K111	WINDSOR PARK	Residential	Acceptable
K301	ALBEMARLE RD	Residential	Major Issues
K302	KELSEY WOODS	Residential	Minor Issues
K308	SPRINGHURST	Residential	Acceptable
K309	WALLACE CREEK	Residential	Minor Issues
K310	WILORA LAKE / VERNDALE	Residential	Major Issues
K314	MCALPINE	Residential	Major Issues
K501	ROCKY RIVER CH RD	Residential	Major Issues
K510	ROCKY RIVER / HOOD RD AREA	Residential	Major Issues
K511	WILLOWS CREEK	Residential	Acceptable
K512	SEVEN OAKS	Residential	Acceptable
K513	FARMWOOD NORTH	Residential	Minor Issues
K515	NICOLET GLEN	Residential	Acceptable
K516	JOHN RUSSELL	Residential	Minor Issues
K518	TALUS	Residential	Acceptable
K519	FARMINGTON WOODS	Residential	Acceptable
K520	BRANTLEY OAKS	Residential	Acceptable
K522	BACKCREEK DOWNS	Residential	Major Issues
K525	CALDWELL COMMONSCALDWELL COMM	Residential	Acceptable
K526	STAFFORD	Residential	Acceptable
K527	BACK CREEK FARMS	Residential	Minor Issues
K701	GROVE PARK / RAVEN WOOD	Residential	Major Issues
K709		Residential	Acceptable
K710	HAMILTON PK / GERA EMMA	Residential	Major Issues
K712	LINDA LAKE	Residential	Major Issues
K713	FARMGATE / CHESTNUT RIDGE	Residential	Minor Issues
K715	CHESSINGTON / WILLOW GATE	Residential	Minor Issues
K716	CHAPPARALL / ROTHMORE	Residential	Major Issues
K721	KARENSTONE / PLAZA / HARRIS	Residential	Major Issues
K722	BOULDER CREEK	Residential	Acceptable
K723	HERON POND	Residential	Minor Issues
K801	HOOD RD	Residential	Major Issues
K802		Residential	Acceptable
K810	WINDRIFT	Residential	Minor Issues
K811	HAMMOND	Residential	Major Issues
K812	RIDGEWOOD / AMBERWOOD	Residential	Minor Issues
K813	LAURIE NEW	Residential	Acceptable
K901	PENCE/HARRIS / LAWYERS	Residential	Major Issues
K902	PENCE ROAD II	Residential	Minor Issues
K903	OLD SAVANNAH	Residential	Minor Issues
K909	ALBEMARLE RD AREA	Residential	Major Issues

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K910	PENCE RD AREA	Residential	Major Issues
K912	ALMOND	Residential	Minor Issues
K913	NATHANIEL GREEN / MALLARD EASTLAK	Residential	Acceptable
K914	PARKERS CROSSING	Residential	Acceptable
K916	MARLWOOD / WILSON GROVE AREA	Residential	Major Issues
K917	LYNTON PLACE / EDINBOROUGH WOODS	Residential	Acceptable
K918	ST CLAIRE / STOXMEADE	Residential	Acceptable
K923	HARRISBURG RD / TIMBER CRK	Residential	Minor Issues
K925	PENCE / ALANBROOK AREA	Residential	Acceptable
K926	LAWYERS RD AREA	Residential	Major Issues
K927	TROTTERS RIDGE	Residential	Acceptable
K928	IVERNESS	Residential	Acceptable
L101	HARRISBURG RD	Residential	Major Issues
L102	BRAWLEY FARMS	Residential	Acceptable
L110	CAMBRIDGE COMMONS	Residential	Minor Issues
L111	VILLAGES OF LARKHAVEN	Residential	Acceptable
L112	WOODLAND FARM	Residential	Acceptable
L113	STEEPLE CHASE	Residential	Major Issues
L114	LAMPLIGHTER	Residential	Minor Issues
L115	THE STONES	Residential	Minor Issues
L116	STEWART CROSSING	Residential	Acceptable
L117	BROOKSTEAD	Residential	Acceptable
L118	ALAMANCE	Residential	Major Issues
L119	TURTLE ROCK	Residential	Acceptable
L120	WINTERWOOD	Residential	Minor Issues
L121	MCCARRON BRADFIELD	Residential	Acceptable
L122	NORTHLAKE	Residential	Acceptable
L123	MISENHEIMER	Residential	Major Issues
L124	FIRST RUN / CASTLE GARDEN	Residential	Acceptable
L125	BRADFIELD FARMS	Residential	Acceptable
L126	CEDAR POST	Residential	Acceptable
L128	MCCARRON WAY	Residential	Minor Issues
L129	FIRST RUN	Residential	Minor Issues
L130		Residential	Acceptable
L131	ASHBY@WOODBERRY	Residential	Acceptable
L132	MAYFIELD @ WOODBERRY	Residential	Acceptable
L134	THE PRESERVE@KINSLEYLAKE	Residential	Minor Issues
L301	DIXIE RIVER RD	Residential	Minor Issues
L302		Residential	Acceptable
L303		Residential	Acceptable
L307	HATHAWAY HILLS	Residential	Acceptable
L309	HUNTWOOD DRIVE AREA	Residential	Acceptable
L311	VINEYARDS	Residential	Acceptable
L501	AIRPORT AREA	Residential	Major Issues
L510	MARKLAND DR AREA	Residential	Major Issues
L701	STEELE CREEK	Residential	Minor Issues
L710	STEELE CREEK	Residential	Minor Issues
M110	DILWORTH SOUTH	Residential	Major Issues
M301		Residential	Acceptable
M309	DILWORTH CRESENT	Residential	Minor Issues
M310	DILWORTH	Residential	Major Issues
M311	DILWORTH I	Residential	Major Issues

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M312	DILWORTH II	Residential	Major Issues
M313	DILWORTH III	Residential	Minor Issues
M314	DILWORTH IV	Residential	Major Issues
M501	COMM E MOREHEAD ST	Residential	Major Issues
M510	CHERRY NEIGHBORHOOD	Residential	Major Issues
M710	CHANTILLY	Residential	Major Issues
M711	ELIZABETH	Residential	Major Issues
M901	CENTRAL AV	Residential	Acceptable
M902	COMMONWEALTH	Residential	Minor Issues
M910	COMMONWEALTH/MORNINGSIDE	Residential	Major Issues
M911	WOODLAND HILLS	Residential	Minor Issues
N101	WINTERFIELD	Residential	Acceptable
N110	NORLAND RD AREA	Residential	Minor Issues
N301	AMITY GARDENS	Residential	Major Issues
N302	IDLEWILD	Residential	Major Issues
N310	AMITY GARDENS AREA	Residential	Major Issues
N311	REDMANN	Residential	Minor Issues
N312	IDLEWILD FARMS	Residential	Major Issues
N313	EASTHAVEN	Residential	Major Issues
N316	COUNTRY WALK	Residential	Acceptable
N501	CHESTNUT LAKE	Residential	Major Issues
N502	RAVENSCROFT	Residential	Acceptable
N503	LEBANON RD AREA	Residential	Minor Issues
N504	MORRIS FARMS	Residential	Minor Issues
N510	IDLEWILD / LAWYERS CORRIDOR	Residential	Major Issues
N512		Residential	Acceptable
N513	HILLSHIRE AREA	Residential	Minor Issues
N515	BRIGHTON PARK	Residential	Acceptable
N518	NEW FARMWOOD	Residential	Major Issues
N519	FARMWOOD OLDE	Residential	Minor Issues
N525	ELLINGTON FARM	Residential	Minor Issues
N526	NARAYAN	Residential	Minor Issues
N527	TELFAIR	Residential	Major Issues
N528	CASSABELA/PORTIFINO	Residential	Acceptable
N529	THE GATES	Residential	Major Issues
N701	MINT HILL	Residential	Major Issues
N702	KEMPER LN	Residential	Acceptable
N711	BAINVIEW	Residential	Minor Issues
N713	PINE GROVE	Residential	Acceptable
N714	WILSON WOODS	Residential	Major Issues
N715	ST. IVES	Residential	Acceptable
N716		Residential	Minor Issues
N717	BAINBRIDGE II	Residential	Minor Issues
N718	VERSAGE	Residential	Acceptable
N721	OXFORDSHIRE	Residential	Major Issues
N722	DANBROOK PARK	Residential	Acceptable
N723	KOOL SPRINGS	Residential	Minor Issues
N724	OLDE STONEGATE	Residential	Acceptable
N725	GROVE HALL	Residential	Acceptable
N901	BLAIR RD / CABARRUS COUNTY	Residential	Major Issues
N902	GLENCROFT	Residential	Minor Issues
N903	FOX RIDGE ESTATES	Residential	Major Issues

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N910	CLEAR MEADOW	Residential	Acceptable
N911	MEADOW HOLLOW	Residential	Acceptable
N912	ARLINGTON OAKS	Residential	Minor Issues
N913	SHERWOOD FOREST	Residential	Major Issues
N916	CONNELL MILL	Residential	Minor Issues
N917	CLEAR CREEK ACRES	Residential	Major Issues
N920	CLEAR CREEK ESTATES	Residential	Acceptable
N921	STONEBRIDGE	Residential	Acceptable
N923	SUMMERWOOD THE OAKS/CEDARS	Residential	Minor Issues
N924	CABARRUS POINT	Residential	Minor Issues
N925	WATERLEAF	Residential	Minor Issues
N926	ALRINGTON HILLS	Residential	Acceptable
N927	SUMMERWOOD	Residential	Acceptable
NEW	NEWLY CREATED PARCELS	Residential	Acceptable
O101	BYRUM DR / SHOPTON RD	Residential	Minor Issues
O110	STEELE CREEK	Residential	Minor Issues
O111	SULLIVAN'S TRACE	Residential	Minor Issues
O301	SOUTH TRYON ST / YORKMONT	Residential	Minor Issues
O302	FIRCREST	Residential	Acceptable
O501	BILLY GRAHAM PARKWAY	Residential	Minor Issues
O505	REID PARK	Residential	Minor Issues
O506	REVOLUTION PARK	Residential	Acceptable
O510	REVOLUTION PARK / WILMORE / S. TRYON	Residential	Major Issues
O511	CLANTON PARK	Residential	Major Issues
O701		Residential	Acceptable
O707	MARSH/POINDEXTER	Residential	Acceptable
O709	SCALEYBARK NORTH	Residential	Minor Issues
O710	MARSH RD	Residential	Minor Issues
O711	PARK RD	Residential	Minor Issues
O901	COLONIAL VILLAGE	Residential	Acceptable
O909	LITTLE HOPE	Residential	Major Issues
O911	SCALEYBARK SOUTH	Residential	Minor Issues
O912	SELWYN FARMS	Residential	Minor Issues
O913	YORK ROAD PARK	Residential	Minor Issues
OF01	OFFICE - DOWNTOWN SUBMARKET	COMMERCIAL	Major Issues
OF02	OFFICE - MIDTOWN SUBMARKET	COMMERCIAL	Major Issues
OF03	OFFICE - I-77 / SOUTHWEST SUBMARKET	COMMERCIAL	Major Issues
OF04	OFFICE - PARK ROAD SUBMARKET	COMMERCIAL	Minor Issues
OF05	OFFICE - SOUTHPARK SUBMARKET	COMMERCIAL	Minor Issues
OF06	OFFICE - COTSWOLD SUBMARKET	COMMERCIAL	Major Issues
OF07	OFFICE - NC 51 / SOUTHWEST SUBMARKET	COMMERCIAL	Acceptable
OF08	OFFICE - EAST SUBMARKET	COMMERCIAL	Major Issues
OF09	OFFICE - NORTHEAST SUBMARKET	COMMERCIAL	Minor Issues
OF10	OFFICE - NORTH SUBMARKET	COMMERCIAL	Major Issues
OF11	OFFICE - CROWN POINT / MATTHEWS SUBMARKET	COMMERCIAL	Major Issues
P101		Residential	Acceptable
P110	DILWORTH AREA	Residential	Major Issues
P301		Residential	Acceptable
P330	MYERS PARK	Residential	Major Issues
P331	MYERS PARK I	Residential	Major Issues
P332	MYERS PARK II	Residential	Major Issues
P333	MYERS PARK III	Residential	Major Issues

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P334	MYERS PARK IV	Residential	Major Issues
P501		Residential	Acceptable
P530	EASTOVER	Residential	Major Issues
P531	EASTOVER I	Residential	Major Issues
P532	EASTOVER II	Residential	Minor Issues
P701	BILLINGSLEY RD AREA	Residential	Minor Issues
P709		Residential	Acceptable
P710	WENDOVER RD AREA	Residential	Minor Issues
P711	WALKER RD / CRAIG AV	Residential	Minor Issues
P712	NORTH WENDOVER RD AREA	Residential	Major Issues
P713	WENDOVER SOUTH	Residential	Minor Issues
P715	WENDOVER SOUTH	Residential	Minor Issues
Q102	AMITY GARDENS	Residential	Minor Issues
Q103	SILABERT AV	Residential	Major Issues
Q110	COMMONWEALTH RD AREA	Residential	Minor Issues
Q301	SHARON ACREAGE	Residential	Minor Issues
Q310	SHERWOOD FOREST	Residential	Minor Issues
Q311	MONROE RD AREA	Residential	Acceptable
Q312	MONROE RD AREA II	Residential	Acceptable
Q501	IDLEWILD RD	Residential	Major Issues
Q502	STRIDER RIDGE	Residential	Acceptable
Q503	PINEY GROVE	Residential	Minor Issues
Q510	IDLEWILD SOUH	Residential	Major Issues
Q511	THOMPSON BROOK	Residential	Minor Issues
Q701	NATIONS FORD RD	Residential	Minor Issues
Q710	MCDOWELL FARMS	Residential	Acceptable
Q711	WHITEHALL	Residential	Minor Issues
Q712	ECHODALE	Residential	Major Issues
Q713	YORK RD / ROLLINGHILLS / NATIONS FOF	Residential	Acceptable
Q714	CHOYCE CIRCLE	Residential	Acceptable
Q715	BRAMBLEWOOD / WOODKNOLL	Residential	Minor Issues
Q718	GREENBRIAR WOODS	Residential	Minor Issues
Q719	NATIONS VILLAGE	Residential	Minor Issues
Q720	CRAFT/BRIGHTON	Residential	Minor Issues
Q901	SOUTH BLVD / TYVOLA RD	Residential	Minor Issues
Q911	ARCHDALE	Residential	Acceptable
Q912	TARA	Residential	Major Issues
R101	WOODLAWN RD	Residential	Acceptable
R111	SENECA PL AREA	Residential	Major Issues
R112	STARMOUNT	Residential	Major Issues
R120	PARK RD EXT AREA	Residential	Minor Issues
R121	ENCLAVE AT CHRISHALL	Residential	Minor Issues
R301	STARMOUNT / TYVOLA	Residential	Acceptable
R302	PARKSTONE	Residential	Minor Issues
R303	SPRING VALLEY/ BRANDON	Residential	Acceptable
R311	HUNTINGTOWNE AREA	Residential	Minor Issues
R312		Residential	Major Issues
R320	SUNNYVALE LN AREA	Residential	Acceptable
R321	CONSERVATORY	Residential	Acceptable
R505	Park Road	Residential	Minor Issues
R510	WESTFIELD RD AREA	Residential	Minor Issues
R701	FAIRVIEW RD / SHARON RD	Residential	Minor Issues

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R710	BARCLAY DOWNS AREA	Residential	Acceptable
R711	BARCLAY DOWNS B	Residential	Minor Issues
R720	COLONY RD AREA	Residential	Minor Issues
R730	BEVERWYCK RD AREA	Residential	Major Issues
R901		Residential	Minor Issues
R919	FAIRMEADOWS / BEVERLY WOODS	Residential	Major Issues
R920	SHARON RD / PARK RD AREA	Residential	Minor Issues
R921		Residential	Minor Issues
R922		Residential	Minor Issues
RE01	RETAIL - DOWNTOWN SUBMARKET	COMMERCIAL	Major Issues
RE02	RETAIL - EAST SUBMARKET	COMMERCIAL	Major Issues
RE03	RETAIL - INNER SOUTHEAST SUBMARKE	COMMERCIAL	Minor Issues
RE04	RETAIL - OUTER SOUTHEAST SUBMARKE	COMMERCIAL	Minor Issues
RE05	RETAIL - SOUTHWEST SUBMARKET	COMMERCIAL	Major Issues
RE06	RETAIL - NORTHWEST SUBMARKET	COMMERCIAL	Major Issues
RE07	RETAIL - NORTH SUBMARKET	COMMERCIAL	Major Issues
RE08	RETAIL - NORTHEAST SUBMARKET	COMMERCIAL	Major Issues
RE2A	E. INDY INNER RETAIL SUBMARKET	COMMERCIAL	Acceptable
S110	COTSWOLD	Residential	Major Issues
S140	WENDOVER	Residential	Major Issues
S141	VERNON DRIVE	Residential	Major Issues
S301	MISC BOOK 183	Residential	Minor Issues
S320	GOVERNOR'S SQUARE GOVERNOR GOVE	Residential	Major Issues
S321	FOXCROFT	Residential	Major Issues
S322	KNOLLWOOD	Residential	Major Issues
S323	SHARON RD AREA	Residential	Major Issues
S324	SHARONWOOD ACRES	Residential	Minor Issues
S325	FOXCROFT EAST	Residential	Acceptable
S340	MORROCROFT MORROCROFT	Residential	Major Issues
S341	MORROCROFT WEST	Residential	Minor Issues
S501	URBAN 185	Residential	Minor Issues
S510	RANDOLPH RD AREA	Residential	Minor Issues
S511	SARDIS RD AREA	Residential	Minor Issues
S520	RANDOLPH PK / PROV PK	Residential	Minor Issues
S540	MEADOWOOD	Residential	Minor Issues
S701	CARMEL RD	Residential	Major Issues
S702	CARMEL RD / SHARON VIEW RD	Residential	Minor Issues
S710	MAMMOTH OAKS	Residential	Major Issues
S720	LANSDOWNE	Residential	Major Issues
S721	BENTLY OAKS	Residential	Acceptable
S722	SHARONVIEW RD AREA	Residential	Major Issues
S724	ROBINSON WOODS	Residential	Minor Issues
S725	WANDERING WAY	Residential	Minor Issues
S726	RHONE DR AREA	Residential	Minor Issues
S727	DUNEDIN	Residential	Acceptable
S728	SUMMERMORE / CHARLESTON	Residential	Major Issues
S729	CHAMBERRY	Residential	Acceptable
S730	ST MICHAEL'S PLACE	Residential	Acceptable
S731	ARBORWAY	Residential	Minor Issues
S740	PELLYN GROVE	Residential	Major Issues
S741	PELLYN WOODS	Residential	Major Issues
S901	FOX RUN/BURTONWOOD	Residential	Major Issues

## Attachment 2

S910	PINEBURR	Residential	Minor Issues
S911	MCCLINTOCK WOODS	Residential	Minor Issues
S912	CHARING PLACE	Residential	Minor Issues
S913	THERMAL RD	Residential	Minor Issues
S914	VALLEY HAVEN DR AREA	Residential	Minor Issues
S916	WAVERLY HALL	Residential	Acceptable
S920	Stonehaven	Residential	Minor Issues
S921	CHARTER PLACE	Residential	Acceptable
S922	COURT DR AREA	Residential	Minor Issues
S923	MILLBURY CT	Residential	Acceptable
S924	MEDEARIS	Residential	Minor Issues
T101	WOODBERRY FOREST	Residential	Acceptable
T110	EAGLEWOOD	Residential	Minor Issues
T111	WOODBERRY RD AREA	Residential	Minor Issues
T112	PEBBLERIDGE	Residential	Acceptable
T301	IND BLVD/IDLEWILD RD AREA	Residential	Minor Issues
T302	SARDIS ROAD NORTH AREA	Residential	Major Issues
T303	FAIRFAX WOODS	Residential	Major Issues
T310	OLD CREEK / DEERHURST	Residential	Major Issues
T312	CREEKWOOD / PLEASANT KNOLL	Residential	Major Issues
T314	MARGARET WALLACE AREA	Residential	Major Issues
T318	SOUTHWOOD / BRANDYWINE	Residential	Acceptable
T324	MILLSTONE RIDGE	Residential	Minor Issues
T325	COCHRANE WOODS	Residential	Minor Issues
T329	WYNCHASE	Residential	Acceptable
T330	MINTWORTH	Residential	Acceptable
T340	ABBNEY CROSSING	Residential	Major Issues
T342	OSAR SUB	Residential	Acceptable
T501	MINT HILL	Residential	Major Issues
T502	JONTHAN'S RIDGE	Residential	Acceptable
T503	MAYHEW FOREST	Residential	Acceptable
T510	MINT HILL	Residential	Major Issues
T511	SHELBURN / OXFORD GLEN	Residential	Major Issues
T512	NOTTAWAY PLANTATION	Residential	Major Issues
T513	CASTLEFORD	Residential	Minor Issues
T520	HEATH LAKE	Residential	Minor Issues
T522	STILWELL / SHANAMARA / MAYHEW	Residential	Acceptable
T523	FAIRINGTON OAKS	Residential	Minor Issues
T524	BEECH MINT	Residential	Major Issues
T525	SIENNA ON LAWYERS	Residential	Major Issues
T526	THOMPSON PLACE	Residential	Minor Issues
T701	EAST OF MINT HILL	Residential	Acceptable
T702	FIELDLARK TRAILS	Residential	Major Issues
T720	ASH PLANTATION	Residential	Minor Issues
T721	OLDE SYCAMORE	Residential	Acceptable
T722	OLDE SYCAMORE- HIGH END	Residential	Major Issues
T723	DAVI RUN/FOX HOLLOW	Residential	Minor Issues
T724	PLEASANT RIDGE	Residential	Minor Issues
T725	PLANTATION FALLS	Residential	Major Issues
T726	IRON GATE	Residential	Minor Issues
T901	LAKE WYLIE/CATAWBA RIVER	Residential	Minor Issues
T902	WYLIE	Residential	Acceptable

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T903	BEREWICK	Residential	Acceptable
T904	CHAPEL COVE	Residential	Acceptable
T905	WILDWOOD MEADOWS	Residential	Acceptable
T910	PINE HARBOR RD	Residential	Minor Issues
T911	KRISLYN WOODS AREA	Residential	Acceptable
T914	WITHERS MILL	Residential	Acceptable
T915	STOWE CREEK	Residential	Acceptable
T916	SANCTUARY	Residential	Major Issues
T920	NEELY GLEN	Residential	Minor Issues
T930	RIVER POINTE AREA	Residential	Acceptable
T932	WATERLYN	Residential	Acceptable
TH08	TOWNHOUSE 08 - SOUTH	Residential	Acceptable
TH0B	Townhomes North Good	Residential	Acceptable
TH0C	Townhomes North Very Good	Residential	Acceptable
TH0G	Townhomes West Blw Ave	Residential	Acceptable
TH0H	Townhomes West Good	Residential	Acceptable
TH0I	Townhomes West Very Good	Residential	Acceptable
TH0N	Townhomes South Good	Residential	Acceptable
TH0P	Townhomes South Very Good	Residential	Acceptable
TH0U	Townhomes East Good	Residential	Acceptable
TH0V	Townhomes East Very Good	Residential	Acceptable
TH12	TOWNHOUSE 12 - SOUTH	Residential	Acceptable
TH18	TOWNHOUSE 18	Residential	Acceptable
TH1A	Townhomes North Ave	Residential	Acceptable
TH1B	Townhomes North Good	Residential	Acceptable
TH1H	Townhomes West Good	Residential	Acceptable
TH1M	Townhouses South Ave	Residential	Acceptable
TH1N	Townhomes South Good	Residential	Acceptable
TH2G	Townhomes West Ave	Residential	Acceptable
TH2M	Townhomes South Ave	Residential	Acceptable
TH2T	Townhomes East Ave	Residential	Acceptable
TH3A	Townhomes North Ave	Residential	Acceptable
TH4A	Townhomes North Ave	Residential	Acceptable
TH4C	Townhomes North Excellent	Residential	Acceptable
TH4G	Townhomes West Ave	Residential	Acceptable
TH4M	Townhomes South Ave	Residential	Acceptable
TH4P	Townhomes South Excellent	Residential	Acceptable
TH4T	Townhomes East Ave	Residential	Acceptable
TH4V	Townhomes East Excellent	Residential	Acceptable
TH8C	Townhomes North Custom	Residential	Acceptable
TH8P	Townhomes South Custom	Residential	Acceptable
TH8V	Townhomes East Custom	Residential	Minor Issues
U101	YORK ROAD	Residential	Minor Issues
U110	TARAGATE / THE WOODS / STEELE CREEK	Residential	Minor Issues
U111	WILLIAMS GLEN	Residential	Minor Issues
U112	ASHTON CREEK	Residential	Acceptable
U113	SANDY PORTER	Residential	Acceptable
U115	DEER CREEK	Residential	Acceptable
U120	RIDGE OAK	Residential	Acceptable
U301	ARROWOOD RD / I-77	Residential	Minor Issues
U310	WINDSONG TRAILS / SHORT HILLS / COLLEGE	Residential	Major Issues
U501	WESTINGHOUSE BV AREA	Residential	Minor Issues

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U502	RIDGELY GREEN	Residential	Minor Issues
U503	PINEVILLE	Residential	Minor Issues
U504	TRADITIONS IN PINEVILLE	Residential	Acceptable
U505	KINGS CREEK	Residential	Acceptable
U509	STERLING / AMON / DOWN	Residential	Minor Issues
U701	URBAN 207	Residential	Acceptable
U710	OBERBECK VILLAGE	Residential	Acceptable
U712	PINE VALLEY/SHARONBROOK	Residential	Minor Issues
U713	OBERBECK FARM / BRANDON FOREST	Residential	Minor Issues
U723	JOHN'S TOWNE @ PARK CROSS	Residential	Acceptable
U732	PARK CROSSING	Residential	Acceptable
U901	SHARON RD / QUAIL HOLLOW	Residential	
U907	CARMEL ACRES	Residential	Minor Issues
U908	NEWCASTLE	Residential	Acceptable
U909	OLDE GEORGETOWN / SHARON HILLS 2	Residential	Minor Issues
U910	TOWN + COUNTRY	Residential	Major Issues
U911	MONTIBELLO CROSSING	Residential	Minor Issues
U913	CARMEL VALLEY	Residential	Acceptable
U914	WINDWOOD / QUAIL VIEW / ASHERTON	Residential	Minor Issues
U915	CARMEL FOREST	Residential	Minor Issues
U916	STURNBRIDGE	Residential	Minor Issues
U919	CAMERON WOODS	Residential	Minor Issues
U920	BEVERLY WOODS / MOUNTAINBROOK / K	Residential	Minor Issues
U921	CAMERON WOODS II	Residential	Minor Issues
U923	SHARON HILLS I	Residential	Minor Issues
U929	WINDINGBROOK	Residential	Acceptable
U930	SHARON WOODS	Residential	Major Issues
U931	BELINGRATH	Residential	Acceptable
U932	GLENEAGLES / QUAIL HOLLOW 3 & 4	Residential	Acceptable
U940	GIVERNY	Residential	Minor Issues
U941	SEVEN EAGLES	Residential	Minor Issues
U942	HEYDON HALL	Residential	Acceptable
U943	WHEATONGROVE	Residential	Acceptable
U961	FOX LAKE	Residential	Acceptable
U962	PRESERVE @ BELINGRATH	Residential	Minor Issues
V101	URBAN 211	Residential	Minor Issues
V104	CASTLEGATE/ROCKCREEK	Residential	Minor Issues
V106	CANDLEWYCK PATIO HOMES	Residential	Acceptable
V107	OLDE PROVIDENCE II	Residential	Major Issues
V110	OLDE PROVIDENCE / BATTLE FOREST / A	Residential	Acceptable
V111	SHADOW LAKE	Residential	Minor Issues
V112	CARMEL STATION	Residential	Minor Issues
V113	RIDGELOCH	Residential	Minor Issues
V114	ARBORETUM CROSSING	Residential	Minor Issues
V115	CANDLEWYCK / FOXGLOVE	Residential	Minor Issues
V116	WESSEX SQUARE	Residential	Acceptable
V117	DARBY HALL	Residential	Minor Issues
V118	COTTONWOOD	Residential	Major Issues
V120	PROVIDENCE LANDING	Residential	Acceptable
V122	OAK RUN	Residential	Acceptable
V123	CARMEL WOODS/WILLIAMSBURG	Residential	Acceptable
V124	FIVE KNOLLS	Residential	Minor Issues

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V125	ALEXSIS	Residential	Acceptable
V127	STALLWORTH / CHEROKEE	Residential	Minor Issues
V128	CARSON POND	Residential	Acceptable
V129	CHADWYCK	Residential	Minor Issues
V130	HUNTCLIFFE	Residential	Acceptable
V131	ROYDEN / LEAMINGTON / HAMPTON MAN	Residential	Minor Issues
V136	CANTERBURY/REACROFT	Residential	Acceptable
V137	WINDSWEPT	Residential	Acceptable
V138	STONECROFT	Residential	Minor Issues
V140	SUMMERLAKE	Residential	Minor Issues
V141	CHALLIS FARM	Residential	Major Issues
V145	CEDARWOOD	Residential	Minor Issues
V163	MONTEBELLO	Residential	Minor Issues
V166	REA WOODS	Residential	Minor Issues
V168	CARMEL SOUTH	Residential	Major Issues
V170	WILTON WOOD	Residential	Minor Issues
V173	CARMEL CRESCENT	Residential	Minor Issues
V174	PROVIDENCE SPRINGS	Residential	Acceptable
V176	CARMEL GREENS	Residential	Acceptable
V177	WHITEGATE	Residential	Major Issues
V179	SHEFFINGDELL	Residential	Major Issues
V180		Residential	Acceptable
V301	PROVIDENCE RD	Residential	Minor Issues
V302	SARDIS AREA	Residential	Major Issues
V310	HERITAGE WOODS	Residential	Acceptable
V311	SARDIS WOODS	Residential	Acceptable
V312	RITTENHOUSE CIRCLE	Residential	Minor Issues
V313	SARDIS FOREST	Residential	Acceptable
V314	OLDE HERITAGE / SETTLERS	Residential	Minor Issues
V316	ALEXANDER WOODS	Residential	Acceptable
V317	BISHOP'S RIDGE	Residential	Minor Issues
V318	HAMPTON LEAS	Residential	Minor Issues
V319	PROVIDENCE COMMONS / HARRISON WC	Residential	Minor Issues
V321	OLDE HERITAGE	Residential	Minor Issues
V322	BEVERLY CREST	Residential	Minor Issues
V323	ALEXANDER / CROFTON / OXFORD	Residential	Minor Issues
V324	BEVERLY CREST A	Residential	Minor Issues
V325	SARDISCROFT / COACH RIDGE	Residential	Acceptable
V328	CEDAR HILL	Residential	Minor Issues
V329	BELLEMEADE	Residential	Minor Issues
V330	SARDIS MILL	Residential	Acceptable
V332	LOST OAK	Residential	Acceptable
V333	Stratfordshire	Residential	Acceptable
V501	WINDROW ESTATES	Residential	Major Issues
V502	IDLEWILD / PHILLIPS RD AREA	Residential	Acceptable
V503	NEW	Residential	Acceptable
V504	NEW	Residential	Acceptable
V505	NEW	Residential	Major Issues
V506	Vance	Residential	Minor Issues
V507	MATTHEWS SCHOOL ROAD	Residential	Major Issues
V510	WINDING TRAIL	Residential	Acceptable
V511	MOSER HOMES	Residential	Acceptable

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V512	WINDROW	Residential	Major Issues
V513	WINDROW VILLAGE	Residential	Acceptable
V701	YORK RD / YOUNGBLOOD RD	Residential	Acceptable
V702	GRAND PALISADES	Residential	Minor Issues
V703	MONTREUX	Residential	Minor Issues
V704	BRIAR CLIFF	Residential	Acceptable
V705	MORNINGSIDE	Residential	Minor Issues
V708	BEAR CREEK	Residential	Major Issues
V709	TREE TOPS	Residential	Acceptable
V720	ROYAL OAKS	Residential	Acceptable
V901	STEELE CREEK AREA	Residential	Major Issues
V910	WALKERS CREEK	Residential	Acceptable
V911	STEEL CREEK/JERPOINT ABBY	Residential	Acceptable
V912	MALLARD LANDING	Residential	Acceptable
V913	MOSS/HIGHLAND	Residential	Minor Issues
V914	WINGED TEAL	Residential	Acceptable
V915	MALLARD LANDING II	Residential	Acceptable
V916	BROTHERLY LANE	Residential	Acceptable
W101	URBAN 221	Residential	Acceptable
W103	PARK LAKE	Residential	Acceptable
W104	PINEVILLE	Residential	Minor Issues
W109	CARMEL / JOHNSTON RD	Residential	Minor Issues
W110	CARMEL / 485	Residential	Minor Issues
W113	PARK RIDGE	Residential	Acceptable
W115	FALCONBRIDGE	Residential	Minor Issues
W120	THE COTTAGES	Residential	Major Issues
W121	PARKWAY CROSSING	Residential	Acceptable
W123	MCCULLOUGH	Residential	Minor Issues
W124	CAROLINA VILLAGE II	Residential	Minor Issues
W301	URBAN 223	Residential	Minor Issues
W302	RURAL 223	Residential	Acceptable
W305	SOUTHAMPTON COMMONS	Residential	Minor Issues
W306	LANDSFORD	Residential	Acceptable
W307	KINGSTON FOREST	Residential	Acceptable
W308	LAMPLIGHTER SOUTH	Residential	Minor Issues
W309	WOODSIDE VILLAGE	Residential	Acceptable
W310	HERSHAM MEWS @ TOUCHSTONE	Residential	Acceptable
W311	TOUCHSTONE	Residential	Acceptable
W312	WHITE OAK	Residential	Minor Issues
W313	ENDHAVEN LANE	Residential	Minor Issues
W316	HOUSTON RIDGE	Residential	Acceptable
W317	FARMINGTON	Residential	Acceptable
W318	521 / LANCASTER HWY	Residential	Minor Issues
W319	DANBY	Residential	Minor Issues
W320	IVY HALL	Residential	Minor Issues
W321	BERWICK	Residential	Acceptable
W322	WOODRUN @ THORNHILL	Residential	Minor Issues
W323	ELMSTONE @ THORNHILL	Residential	Acceptable
W324	WYNDHAM OAKS	Residential	Acceptable
W329	BALLANTYNE GLEN	Residential	Minor Issues
W330	KENSINGTON	Residential	Acceptable
W331	BALLANTYNE	Residential	Acceptable

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W332	BALLANTYNE PHASES 1-9	Residential	Acceptable
W333	STONEBRIAR	Residential	Minor Issues
W335	BALLANTYNE MEADOWS	Residential	Acceptable
W336	SAUSSY MEDOWS	Residential	Acceptable
W349	EVERMAY	Residential	Acceptable
W350	AMBERLEIGH	Residential	Minor Issues
W351	KENILWORTH	Residential	Acceptable
W352	VINEYARD	Residential	Acceptable
W353	BEXLEY IN BALLANYLNE	Residential	Minor Issues
W354	GLENFINNAN / BRIDLESTON	Residential	Acceptable
W355	CARLYLE	Residential	Minor Issues
W358	BRIDGE HAMPTON	Residential	Minor Issues
W359	KINGSLEY	Residential	Acceptable
W360	PROVIDENCE POINTE	Residential	Acceptable
W361	PROVIDENCE POINTE / KNOLLS	Residential	Minor Issues
W362	OAKBROOKE	Residential	Acceptable
W501	MISC 225	Residential	Minor Issues
W502	RURAL 225	Residential	Acceptable
W510	TIMBERIDGE @ RT	Residential	Minor Issues
W511	QUAIL ACRES @ RT	Residential	Minor Issues
W512	RAINBOW FOREST @ RT	Residential	Acceptable
W513	SOUTHBURY @ RT	Residential	Minor Issues
W514	DOWNS GRANT @ RT	Residential	Acceptable
W516	LAKE PROVIDENCE	Residential	Major Issues
W518	ESSEX FELS	Residential	Minor Issues
W520	RAINTREE I	Residential	Minor Issues
W522	BERKELEY	Residential	Minor Issues
W523	BRITTANY OAKS	Residential	Minor Issues
W524	PULLENGREEN	Residential	Minor Issues
W525	POND SIDE	Residential	Acceptable
W526	WILLIAMSBURG SOUTH HUNTERS VALLE	Residential	Acceptable
W528	DEERPARK@ RAINTREE	Residential	Minor Issues
W530	GREYSON	Residential	Minor Issues
W531	ROSECLIFF	Residential	Acceptable
W532	CARRINGTON	Residential	Acceptable
W533	BALLANTRAE	Residential	Acceptable
W535	HIGHLANDS / IVERNESS @ PIPER GLEN	Residential	Minor Issues
W536	OLD ST ANDREWS	Residential	Acceptable
W538	STUARTS ISLE @ PIPER GLEN / OLD COL	Residential	Acceptable
W540	PIPER GLEN	Residential	Minor Issues
W541	LINKSIDE VILLAGE @ PG	Residential	Major Issues
W542	THE GREENS @ PG	Residential	Acceptable
W543	GLYNMOOR LAKES @ PG	Residential	Major Issues
W545	HOLLY HILL @ RT	Residential	Acceptable
W701	MATTHEWS	Residential	Major Issues
W702	MATTHEWS/WEDDINGTON	Residential	Minor Issues
W709	MATTHEWS UPTOWN	Residential	Minor Issues
W710	COURTNEY PL S/D	Residential	Minor Issues
W711	BRIGHTEN S/D	Residential	Acceptable
W712	DEER CREEK / SADIE DR	Residential	Minor Issues
W713	BRIGHTMOOR	Residential	Minor Issues
W714	SOMERSBY CHAPHYN	Residential	Minor Issues

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W715	MATTHEWS PLANTATION	Residential	Minor Issues
W716	SARDIS PLANTATION	Residential	Major Issues
W717	ASHLEY CREEK	Residential	Acceptable
W720	REVERDY / ELIZABETH	Residential	Acceptable
W722	MALLORY MANOR	Residential	Major Issues
W723	HUNTINGTON S/D	Residential	Minor Issues
W724	WINTERBROOKE	Residential	Minor Issues
W725	HAMPTON GREEN II	Residential	Minor Issues
W726	FLOWERING DOGWOOD	Residential	Minor Issues
W727	PROVIDENCE SPRINGS	Residential	Minor Issues
W728	SQUIRES / PROV PLANTATION	Residential	Acceptable
W729	THORNBLADE	Residential	Minor Issues
W730	ST GEORGE PL	Residential	Acceptable
W731	HEMBSTEAD	Residential	Minor Issues
W732	PROVIDENCE PLANTATION	Residential	Minor Issues
W734	PROVIDENCE HEIGHTS	Residential	Acceptable
W735	RIVENDELL ESTATES	Residential	Major Issues
W736	PROVIDENCE GLEN	Residential	Acceptable
W737	SHEA PROV PLANT	Residential	Acceptable
W738	MATTHEWS ESTATES	Residential	Minor Issues
W739	BAILEWICK	Residential	Minor Issues
W740	PROVIDENCE PLANTATION - TOLL	Residential	Major Issues
W741	DEVEREAUX	Residential	Acceptable
W742	CANTERBURY	Residential	Minor Issues
W743	SAVANNAH HILLS	Residential	Minor Issues
W744	GREYLOCK	Residential	Minor Issues
W745	SHADOW FOREST	Residential	Major Issues
W901	LOWER PROVIDENCE	Residential	Acceptable
W902	UPPER PROVIDENCE	Residential	Acceptable
W904	MITCHELL GLEN / WILDFLOWER POND	Residential	Acceptable
W905	CAMBRIDGE AT SOUTHAMPTON	Residential	Minor Issues
W906	OXFORD AT SOUTHAMPTON	Residential	Minor Issues
W910	LANDEN GLEN / POLO VIEW @ LANDEN	Residential	Acceptable
W911	PROVINCETOWNE	Residential	Minor Issues
W912	RAEBURN I	Residential	Acceptable
W914	LANDEN MEADOWS	Residential	Minor Issues
W916	HUNTERS GATE	Residential	Acceptable
W919	RAEBURN II / PARKS FARM	Residential	Minor Issues
W922	PROVIDENCE CROSSING	Residential	Acceptable
W923	WILLIAMSBURG I	Residential	Acceptable
W924	VANDERBILT AT PROVIDENCE	Residential	Minor Issues
W925	WYNRIDGE ESTATES	Residential	Major Issues
W926	BLAKENEY HEATH	Residential	Acceptable
W927	ELLIGTON PARK	Residential	Acceptable
W928	CADY LAKE	Residential	Minor Issues
W929	ALLYSON PARK	Residential	Minor Issues
W932	GLYNDEBOURNE	Residential	Minor Issues
W933	PRESERVE @ RAVENCREST	Residential	Minor Issues
W934	BLAKENEY GREENS	Residential	Minor Issues
W935	SADDLEBROOK	Residential	Minor Issues
W936	CIMARRON	Residential	Acceptable
W937	SUNDANCE/SILVERADO	Residential	Acceptable

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W938	SOLEDO @ STONE CREEK	Residential	Minor Issues
W939	SIERRA @ STONE CREEK	Residential	Acceptable
W940	PROVIDENCE COUNTRY CLUB	Residential	Major Issues
W942	HIGHGROVE	Residential	Acceptable
W950	THE ARBOURS @ REAVENCREST	Residential	Minor Issues
W952	THE LAURELS @ REAVENCREST	Residential	Minor Issues
W953	ASHTON GROVE	Residential	Minor Issues
W954	OAK RIDGE	Residential	Acceptable
W955	WESTON GLEN	Residential	Acceptable
W956	ARDREY	Residential	Minor Issues
W957	AUBURN PLACE	Residential	Acceptable
W958	ARDREY WOODS	Residential	Minor Issues
W959	ARDREY CHASE	Residential	Minor Issues
W960	ARDREY CREST	Residential	Acceptable
X101	MCKEE RD	Residential	Minor Issues
X110	SOUTH HALL / TILLEY MORRIS / THORNB	Residential	Acceptable
X112	CHESTNUT HILL	Residential	Minor Issues
X113	WILLOMERE	Residential	Minor Issues
X114	WILLOMERE II	Residential	Acceptable
X117	HEARTHSTONE II	Residential	Acceptable
X118	NOTTINGHAM	Residential	Acceptable
X120	HAMPTON OAK / LINDEN OAKS	Residential	Major Issues
X121	PROVIDENCE ARBOURS	Residential	Acceptable
X122	PROVIDENCE WOODS	Residential	Acceptable
X123	ROXBURY	Residential	Minor Issues
X124	PROVIDENCE HILLS	Residential	Minor Issues
X125	DEERFIELD CREEK	Residential	Minor Issues
X126	MCKEE WOODS	Residential	Acceptable
X130	Genevieve	Residential	Minor Issues
X131	MATTHEWS RIDGE	Residential	Acceptable
X132	MATTHEWS GROVE	Residential	Acceptable
X133	PLEASANT RIDGE	Residential	Acceptable
Y100	INDUSTRIAL	Residential	Acceptable

## **Revaluation Public Appearances (Assessor's Info Sessions & Budget Roadshows)**

\*Events below featured Assessor Ken Joyner, unless otherwise noted.

Nov. 12, 2013 – Cherry Neighborhood Association

Nov. 18, 2013 – Mint Hill Town Council

Dec. 2, 2013 – Cornelius Town Council

Dec. 10, 2013 - Berkshire Hathaway Realty Firm in Huntersville

Dec. 16, 2013 – Huntersville Town Council

Jan. 11, 2014 – Historic West End Neighborhoods Association\*\*

Jan. 14, 2014 – Davidson Town Council

Jan. 27, 2014 – Matthews Town Council

Feb. 10, 2014 – Charlotte City Council

Feb. 12, 2014 – Pineville Town Council

May 15, 2014 – County Manager Dena R. Diorio at AARP in Morrison Branch Library

May 16, 2014 – County Manager Dena R. Diorio at Senior Center in Huntersville

May 22, 2014 – County Manager Dena R. Diorio at Charlotte Providence Rotary Club

Sept. 18, 2014 – Charlotte Realtor™ Assoc. Candidate Fish Fry (Booth at event)

Oct. 1, 2014 – Sent Multiple Videos for Distribution to Charlotte Realtor™ Assoc. Members

Oct. 7, 2014 – Allen Tate Realtors on Providence Road

Oct. 9, 2014 – Rotary Club of Charlotte, Providence Chapter

Jan. 13, 2015 – Charlotte Real Property Council

Jan. 13, 2015 – Matthews Town Council

Jan. 16, 2015 – Pine Valley Community Development Association

Jan. 27, 2015 – Colonial Village Neighborhood Association

Feb. 10, 2015 – Madison Park Homeowner’s Association

Feb. 21, 2015 – District 3 Town Hall Presented by Council Member Mayfield\*\*\*

Feb. 24, 2015 – Montclair Neighborhood Association

Mar. 10, 2015 – League of Women’s Voters sponsored Civics 101

Mar. 12, 2015 – Commissioner George Dunlap Community Meeting

Mar. 30, 2015 – Charlotte City Council Budget Committee

April 20, 2015 – Huntersville Rotary Evening Club

May 7, 2015 – Huntersville Rotary Breakfast Club

\*\*Also included Pearson Appraisal Project Manager Lloyd Salter

\*\*\* Mr. Joyner was out of town and Assistant Assessor Christy Lantis and Pearson Appraisal Project Manager Lloyd Salter