



Office of Strategy & Budget MEMORANDUM

May 15, 2015

TO: Mayor and City Council

FROM: Kim S. Eagle, Interim Director

SUBJECT: Materials from May 13th Budget Adjustments Meeting for May 18th Budget Workshop

The May 18th Budget Workshop provides an opportunity for Council to further discuss adds/deletes proposed at the May 13th Budget Adjustments meeting, as well as propose additional changes to the Manager's Recommended FY2016 & FY2017 Operating Budget and FY2016-2020 Community Investment Plan.

By Council practice, Council members identify items for addition or deletion to the recommended budget. Those items receiving five or more votes from Council members will be analyzed by staff and brought back for a vote at the straw votes meeting scheduled for May 26th. Each of the May 26th items receiving six or more votes will be included in the budget adoption ordinance on June 8th.

This packet includes:

- List of Council's proposed adds/deletes from the May 13th Budget Adjustments meeting
- Questions & Answers from the May 13th Budget Adjustments meeting
- Consolidated Questions & Answers from prior Budget Workshops, categorized by subject area

Next step in the budget process include:

- May 18, 3:00 p.m., Budget Workshop, Room 267
- May 26, 3:00 p.m., Budget Straw Votes, CH-14
- June 8, 7:00 p.m., Budget Adoption, Council Chambers

Attachment

C: Ron Carlee, City Manager
Executive Team
Department Directors
Office of Strategy & Budget Staff

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Operating Budget Adds/Deletes

Budget Workshop

May 18, 2015

Q/A Reference Section	Council Member	Item	FY16 Add	FY16 Delete	Proceed to Straw Votes? (Yes/No)
Pay & Benefits					
N/A	Mayfield	City Employees earning salaries of greater than \$180,000 will not receive the \$1.5 proposed merit increase in FY2016		\$ 25,000	
			\$ -	\$ 25,000	
Question 35 & 37 (Pages 25-26)	Smith	Eliminate adjustment to Public Safety Pay Plan (2.5% or 5.0% Public Safety step adjustment based on rank and current step and 0.75% market adjustment), and 1.5% Broadband merit budget (for all other general employees and City Council).		\$ 4,811,204	
			\$ -	\$ 4,811,204	
Taxes & Transportation & Solid Waste Services & General Community Investment Plan					
Question 11 (Page 3) & Question 47 (Page 36) & Questions 52-57 (Pages 38-39)	Smith	Eliminate the proposed conversion of the Single Family Residential Solid Waste Fee & Contract Escalation to a Property Tax increase (1.35 Cents) in addition to the Revenue Neutral Property Tax Adjustment (0.41 Cents) for a total of 1.76 cents. (Revenue decrease, would require offsetting expenditure decrease or revenue increase) Increase Solid Waste fee for contract escalations	\$ 3,200,000	\$ 6,864,340	
			\$ 3,200,000	\$ 6,864,340	
Questions 93-96 (Pages 74-76)	Driggs	Increase contribution from Debt Service Fund Tax Rate from the Manager's revised recommended amount of 0.38 Cents (\$3,392,869) to 0.50 Cents (\$4,464,301). The Incremental amount of 0.12 Cents equals an additional transfer of \$1,071,432 from the Municipal Debt Service Fund	\$ 1,071,432		
			\$ 1,071,432	\$ -	
Questions 49-50 (Page 37)	Kinsey	Eliminate Multi-Family Collection Contract (partial savings in transition year) Eliminate Multi-Family curbside service provided by Solid Waste Services (partial savings in transition year) (Amounts are reflective of elimination of all Solid Waste Fees, per the Manager's amended Recommendation, Full year expenditure savings in FY2017 would be approximately \$6.4 million)		\$ 2,261,576 \$ 474,720	

Operating Budget Adds/Deletes

Budget Workshop

May 18, 2015

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Q/A Reference Section	Council Member	Item	FY16 Add	FY16 Delete	Proceed to Straw Votes? (Yes/No)
Questions 76-77 (Pages 56-57)	Smith	Eliminate the rate adjustment to tiers 3 and 4 of the Storm Water fee structure	\$ -	\$ 2,736,296	
Questions 99-100 (Pages 80-82)	Smith	Eliminate the FY2016 operating expense contribution from the Transit Investment Pay-As-You-Go Program (PAYGO) for Phase 1 of the CityLYNX Gold Line	\$ -	\$ 8,139,886	
Questions 98-103 (Pages 80-83) Question 44 (Page 34)	Smith	Eliminate Capital Reserve in PAYGO for Operating phase 2 of the CityLYNX Gold Line Restore General Fund contribution to the Powell Bill Fund for Street Resurfacing (accounts for 4% of overall Street Resurfacing Budget)	\$ -	\$ 1,503,291	
Question 44 (Page 34) Question 105 (Page 85)	Barnes	Restore General Fund contribution to the Powell Bill Fund for Street Resurfacing (accounts for 4% of overall Street Resurfacing Budget) Use one time funding proceeds from the sale of I-277 City owned land parcels	\$ 857,265	\$ 1,500,000	
User Fees					
Questions 12-19 (Pages 4-12)	Smith	Eliminate Land Development fee increases (Revenue decrease, would require offsetting expenditure decrease)		\$ 1,400,000	
			\$ -	\$ 1,400,000	
City Expenditures					
Question 30 (Page 19)	Smith Fallon	Reduce City Council Travel to \$5,000 per Council Member		\$ 44,044	
			\$ -	\$ 44,044	

Operating Budget Adds/Deletes

Budget Workshop

May 18, 2015

Q/A Reference Section	Council Member	Item	FY16 Add	FY16 Delete	Proceed to Straw Votes? (Yes/No)
Question 32 (Page 21)	Mayfield	Restore City Council Town hall Meeting Budget to \$600 per meeting	\$ 2,200		
			\$ 2,200	\$ -	
Question 30 (Page 19)	Barnes	10% reduction to General Fund Financial Partners		\$ 346,581	
			\$ -	\$ 346,581	
Question 30 (Page 19)	Austin	5% reduction to General Fund Financial Partners		\$ 173,291	
			\$ -	\$ 173,291	
Question 25 Page 16	Driggs	Set a General Fund goal of a 1.25% expense reduction		\$ 2,879,244	
			\$ -	\$ 2,879,244	
Question 34 Page 24	Lyles	Eliminate services provided by CMPD that are typically State responsibilities		\$ 1,645,599	
			\$ -	\$ 1,645,599	
May 15th Q/A	Phipps	Delete Council Discretionary Fund		\$ 100,000	
			\$ -	\$ 100,000	
N/A	Autry	Restore funding for Bike Charlotte Program	\$ 35,000		
			\$ 35,000	\$ -	
Financial Partners					
Question 86 (Page 68)	Smith	Eliminate Economic Opportunity Task Force funded in PAYGO		\$ 100,000	
			\$ -	\$ 100,000	

Operating Budget Adds/Deletes

Budget Workshop

Q/A Reference Section	Council Member	Item	FY16 Add	FY16 Delete	Proceed to Straw Votes? (Yes/No)
Question 82 (Page 62) & Question 30 (Page 19)	Smith	Reduce Arts & Science Council General Fund contribution by 10%		\$ 294,082	
			\$ -	\$ 294,082	

Financial Policies & Practice

May 18, 2015

Question 109 Page 87	Clodfelter	1% reduction in General Fund Fund Balance (One-time Revenue Increase) 1% reduction in General Fund Fund Balance (Ongoing Revenue Increase)	\$ 5,800,000	\$ 100,000	
			\$ 5,900,000	\$ -	
May 15th Q/A	Clodfelter	Full cost recovery for Central Business District Special Events to potentially charge to the Municipal Service Districts (MSD's)		Unknown	
			\$ -	\$ -	

Public Safety

N/A	Fallon	Add Ladder 28 - NorthLake Mall (1 Ladder Truck and 18 Sworn positions)	\$ 2,723,193		
			\$ 2,723,193	\$ -	

Capital Budget Adds/Deletes

Budget Workshop

Council Member	Item	FY16 Add	FY16 Delete	Proceed to Straw Votes? (Yes/No)
		\$0	\$0	

May 18, 2015

May 13th Budget Workshop Questions & Answers

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Questions and Answers

May 13th Budget Adjustments Workshop

(distributed May 15th)

General Fund Operating Budget

Question 1: *What would be the impacts if the City-funded state responsibilities were returned to the state?*

The primary City-funded state responsibility is that of support to the District Attorney's Office and Court System in the amount of approximately \$1.65 million, which includes 24 positions (19 of these are City positions).

The District Attorney's Office has been asked to provide a response on the impacts of reducing or eliminating City funding. A response from the District Attorney's Office is expected the week of May 18th.

If the City Council wishes to request that the State provide funding for these services, it is the recommendation of staff that this request be made directly by Council.

Overview of City Funding to the District Attorney's Office and Court System

The City currently funds three District Attorney's Office and Court Units:

1. Court Services Unit
2. District Attorney's Property Crimes Unit
3. Mecklenburg County's State Justice Services for Drug Court

The summary of these three Units is provided below:

1. Court Services Unit – 19 positions FY2016 = \$1,266,426

This Unit is two-fold: 1) Court Liaison Services and 2) District Attorney Liaison Services. The unit assists in managing the Grand Jury system, issuing subpoenas and indictments, setting trial court calendars, and providing clerical support to judges, specifically:

1. Court Liaison Services (1 Sergeant and 1 Office Assistant)
 - Supervise CMPD officers attending court
 - Assist DA's office and Clerk of Court with court related problems
 - Prepare reports on court attendance, court absences, subpoena service and property disposition
 - Document citation errors and No Probable Cause reports
 - Monitor activity in the courtrooms
 - Ensure service of subpoenas
 - Attend Criminal Court Committee and Arrest Processing meetings
2. DA Liaison Services (2 Sergeants, 9 Detectives, 6 Office Assistants)
 - Serve subpoenas to all victims, witnesses, officers, for all Superior Court cases along with all Domestic Violence related cases in District Court. Approximately 19,000 subpoenas served annually.

- Manage Citizens Parole Accountability Committee to review inmates scheduled for parole hearings. This committee reviews the most violent offenders and makes recommendations regarding early release.
 - Manage the Grand Jury process by subpoenaing officers. There are 150-300 Bills of Indictment each week.
 - Assist Interstate Compacts serving subpoenas to residents summoned by an outside district.
 - Assist prosecutors with discovery requirements and set up meetings to view evidence before trials.
 - Investigate "Warrant No Issue" cases where individuals are suspected of abusing the warrant process
 - Provide case screening, improve presentations and further workup on cases
 - Track all felony cases and provide statistical data to the DA's Office and CMPD
 - Assist prosecutors with transporting key witnesses to court
2. District Attorney's Property Crimes Unit - 5 positions FY2016 = \$321,173
Program provides two Assistant District Attorneys and three support personnel for the Property Crimes Unit. The objective of this unit is to reduce the time for disposition of property cases, and to obtain the appropriate punishment for habitual offenders.
3. Mecklenburg County's State Justice Services for Drug Court FY2016 = \$58,000
The City/CMPD shares the cost of providing the County's state justice services for Drug Court. This program is made up of a specialized team of assistant district attorney's that specialize and concentrate solely on felony drug cases. The drug court program should not be confused with the drug treatment court, which is a County funded program that provides alternatives to incarceration by focusing on treatment of underlying substance abuse issues.

Question 2: *How have Council discretionary funds been used in prior years?*

City Council discretionary funds have been used for unanticipated projects that may occur during the year in which Council wishes to fund. Of the \$200,000 budgeted, below lists examples of how these funds have been used over the past eight years:

- In FY2008, Council approved an additional allocation of \$20,000 to the YWCA for After-School Enrichment.
- In FY2009, Council approved allocations of \$25,000 for the Charlotte Regional Partnership's Film Commission, \$50,000 for Community Building Initiative, \$50,000 for Loaves and Fishes Food Bank, and \$1,042 for Citizen Pledge wallet cards.
- In FY2010, Council approved allocations of \$59,152 to restore funding to the Lakewood Community Development Corporation and several after-school programs, \$84,332 to restore funding to Centralina Council of Governments, \$10,000 for Urban Land Institute Transportation Study, and \$25,000 for Goodwill Industries Youth Job Connection Program.
- In FY2011, Council approved \$94,554 for ImaginOn (Children's Theatre) to restore the first year of a three-year phase out of funding.

- In FY2012, Council approved an allocation of \$106,808 to cover a transition gap period associated with moving Out-of-School-Time contracts to a start date of September (versus July 1).
- In FY2013, Council approved an allocation of \$30,000 for The Washington Center Fellowship Program.
- Council has not approved any allocations for FY2014 or FY2015.

Question 3: *If the recommended tax adjustment remained unchanged, what additional cuts would be made to cover the budget gap?*

In addition to the tax adjustments, the City Manager's FY2016 Recommended Budget included \$7.7 million in General Fund service and expense reductions.

If the tax rate remained unchanged, there would be a General Fund operating budget gap of approximately \$6.9 million. The FY2016 Recommended Budget included several alternative service reductions totaling \$3.8 million (and 28 filled positions), which would be considered if the tax adjustment was unchanged. The additional \$3.1 million gap could be addressed through a combination of further service reductions, and additional transfers from the Debt service fund.

Cutting the General Fund operating budget by an additional \$6.9 million would require impacting services, which are largely staff intensive. The \$6.9 million equivalent of staff salaries and benefits is 90 full time filled equivalent positions.

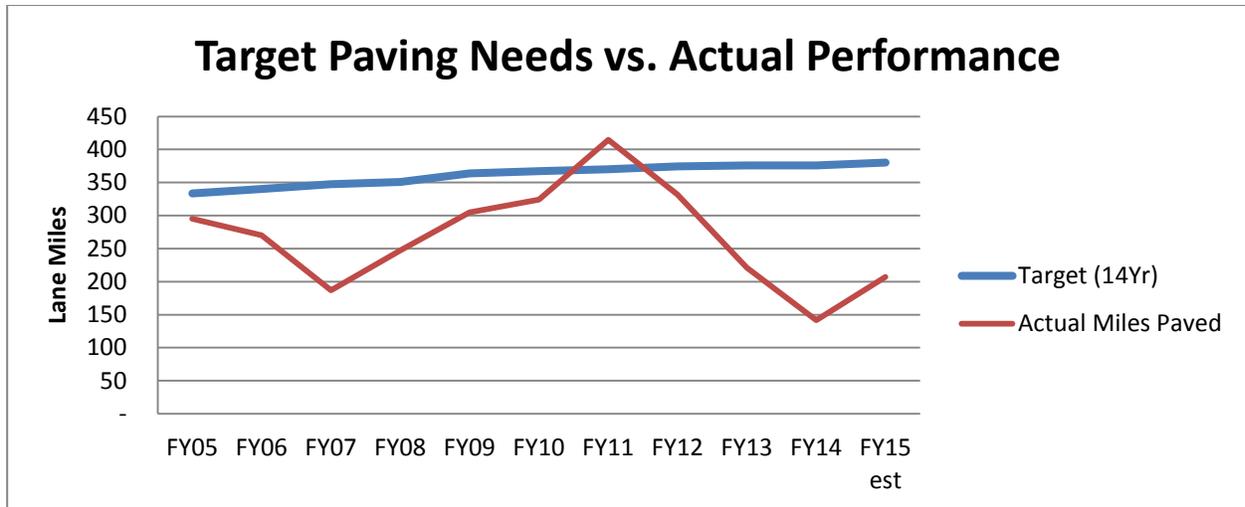
Question 4: *What is the City's target for the street repaving cycle, and how does this compare to the actual miles of streets repaved? What are the criteria for street repaving schedule?*

Target for the street repaving cycle

The City's target for street repaving is 12-14 years. A repaving cycle at this frequency maintains high quality pavement, reduces the frequency of potholes and lessens the occurrence of other pavement distresses that require more costly long term repairs.

Actual miles of streets repaved compared to target

The City currently maintains more than 5,200 lane miles of roadway. To pave all the roads within the system on a 14 year cycle would require paving 376 lane miles annually. Based on current estimates, the City will pave 207 lane miles during FY2015. The following chart illustrates the lane miles paved by fiscal year versus the number needed to maintain a 14 year paving cycle.



What are the criteria for street repaving schedule?

The Street Maintenance Division utilizes three steps to identify streets to resurface:

1. Using the current pavement condition rating, Street Maintenance Division staff selects streets that are rated below an 85 and mathematically determines which streets, when paved, will result in the highest overall pavement condition rating for the City. This method follows the industry practice to address a balanced number of streets within the system instead of focusing all the resources on the worst streets. Streets in the worst condition cost the most to repair and would significantly deplete the available funding. The goal is to address streets at various levels of deterioration to maximize the number of streets in good condition while still addressing critical needs.
2. Field Operation Supervisors identify additional streets that should be added to the list due to unusual circumstances or to support other projects within the area.
3. Due to conflicts with other projects, both public and private, streets may be removed during prior year paving activities. These streets are added back to the list when the conflicts are resolved.

Approximately 76% of the funding is applied to Step 1 for street selection using the model. 15.5% and 8.5% of the annual funding is used in Steps 2 and 3, respectively. The amount of resurfacing needs identified in steps 2 and 3 can vary in each year.

General Community Investment Plan

Question 5: *Are there additional City-owned land parcels planned to be sold prior to the end of the fiscal year, and has staff identified any proposed uses for the proceeds from those sales?*

Community Investment Plan Financial Policies approved by City Council call for the dedication of proceeds from City-owned land sales to the General Community Investment Plan to be used for one-time capital investments, unless otherwise directed by Council.

The following table lists some of the City-owned land parcels currently and potentially offered for sale in the coming few months. Additional parcels will likely be added to this list in the coming months as Engineering & Property Management's Real Estate division completes work to prepare the parcels for sale.

City-Owned Parcel	Estimated Sales Price	Status
West Tyvola Road	\$1,610,000	May 11, 2015 Council Action to accept offer
2912 L.D. Parker Drive	\$36,500	May 11, 2015 Council Action to accept offer
1215 South Blvd	\$1,700,000	Listed for Sale
West Tyvola Road	\$1,092,000	To be listed for sale
Hamilton Street	\$70,000	To be listed for sale
Total Potential Proceeds	\$4,508,500	

Due to the City's required Upset Bid process, and the timeframe expected to complete closing on any final approved land sales, staff does not expect sales proceeds to be available in FY2015 from any of these properties.

Additionally, the City is currently in the process of selling five City-owned land parcels associated with the I-277 Interchange improvements. Staff estimates that excess proceeds from the sale of the five I-277 parcels will produce between \$2.5 million and \$3.0 million that will be available for use on future capital projects. The excess proceeds from the sale of the I-277 land parcels will not be available until late FY2016 or early FY2017, after land sale proceeds are first used to retire the outstanding Bank of America and Wells Fargo loan.

Total net proceeds from these land sales, including the I-277 parcels, are estimated to be between \$7.0 million and \$7.5 million. To date, approximately \$3.2 million from these proceeds has been either programmed for use in the five-year General PAYGO Community Investment Plan, or proposed for use in the FY2016 recommended budget, as follows:

- **\$959,471** of the \$1,700,000 in expected proceeds from the sale of 1215 South Boulevard is programmed in the PAYGO Program to be appropriated in FY2017.
- **\$2.2 million** in proceeds from the sale of other parcels listed in the above table to provide transitional funding in FY2016 as part of the replacement of \$3.4 million in revenue from the elimination of the Multi-Family Solid Waste Fee.

Between \$3.8 million and \$4.3 million in net proceeds from the above identified parcels remains uncommitted, and will likely become available in FY2016 or FY2017 for use on future capital projects not yet identified.

Question 6: *What are the capital costs associated with building the additional 6 miles of the LYNX Gold Line?*

The CityLYNX Gold Line has been part of the Metropolitan Transit Commission (MTC) Corridor System Plan since 2002 and was reaffirmed in the 2030 Corridor System Plan update adopted by the MTC on November 15, 2006. Overall the planned Gold

Line corridor is 10 miles and is being constructed in phases, based largely on the availability of funding, as well as the complexities of design. The full 10-mile Gold Line corridor will run from Rosa Parks Community Transit Center on Beatties Ford Road to Eastland Community Transit Center on Central Avenue.

The 2030 Transit Corridor System Plan adopted in 2006 estimated total construction costs for the full 10-mile corridor at \$421 million. The MTC's Transit Funding Working Group Report dated May 6, 2013 included an update of the 2030 Transit Corridor System Plan estimates, showing total construction cost for the 10-mile Gold Line corridor to now be \$447 million. To date, \$187 million has been identified to construct the first four miles for the Gold Line Phases 1 and 2, with the remaining six miles estimated to cost approximately \$260 million. More specific cost estimates to construct the remaining 6 miles of the Gold Line corridor will be difficult to determine prior to developing more specific design details for subsequent phases. Additionally, construction costs will vary depending on several factors that are unknown at this time, including final alignment over the CSX Railroad, final size and location of the vehicle Maintenance Facility, and potential risks associated with utilities, subsurface conditions, and the prevailing cost of right-of-way acquisition.

Question 7: *What is the funding source of the City's General PAYGO funds?*

The City's Pay-As-You-Go (PAYGO) Fund provides cash investments for relatively small capital projects, ongoing maintenance and repair of City facilities, and contributions to transit Maintenance of Effort and CityLYNX Gold Line operations. The PAYGO program is funded with revenue from property tax, sales tax, motor vehicle licenses, vehicle rental tax, grants, program income, and other non-recurring revenues such as sale of property, interest earnings, and capital reserves and fund balance.

In FY2016, the PAYGO Fund is divided into two distinct programs to separate funding in support of the City's contribution to transit from other PAYGO funding supporting the General Community Investment Plan.

General PAYGO Program (\$33.1 million in FY2016)

- **Sales Tax (\$16.5 million)** – A portion of the revenue from the County half-cent (Article 42) sales tax distributed to the City is transferred to the General PAYGO Fund each year in an amount equal to the sales tax revenue from Article 40 that is dedicated to the Municipal Debt Service Fund. Sales taxes represent the largest source of revenue for the PAYGO Fund, providing \$16.5 million in revenue in FY2016, or 49.9% of the total revenue supporting the General PAYGO Program.
- **Property Tax (\$10.9 million)** – In FY2016, 1.2 cents (2.5%) of the City's total recommended property tax rate is dedicated to the PAYGO Fund. The PAYGO dedicated property tax provides \$10.9 million in revenue for FY2016, or 32.9% of the total revenue supporting the General PAYGO Program.
- **Non-Recurring Revenue (\$5.1 million)** – The following non-recurring revenue sources provide 15.3% of the total funding in the General PAYGO Program, primarily supporting various one-time and non-recurring expenditures such as PeopleSoft Technology Upgrade, Government Center Elevator Upgrade, A Way Home Rental Assistance Endowment, Americans with Disabilities Act (ADA) facility upgrades, and one-time funding to support the Economic Opportunity Task Force:

- **Capital Fund Balance & Reserves (\$3.9 million)** – Funding in excess of the 16% General Fund fund balance reserve is dedicated by Council policy to PAYGO capital expenses, unless otherwise directed by Council.
- **Sale of Land (\$0.7 million)** – Proceeds from the sale of City-own land are dedicated by Council policy to PAYGO capital expenses, unless otherwise directed by Council.
- **Interest Income and Contributions from Others (\$0.5 million)** – Interest earned by the PAYGO program is appropriated each year to support expenses in the PAYGO Program. In FY2016, Mecklenburg County will provide a contribution to the PAYGO Fund for its share of the costs associated with the Government Center Elevator Upgrades.
- **Housing Program Income (\$0.5 million)** – Income generated from principal and interest payments and late fees on affordable housing loans is used to support Neighborhood & Business Services’ Innovative Housing Program and HOME Grant Program.

A new Transit Investment PAYGO Program is recommended in FY2016 to manage all transit-related activities funded through general City revenues. The following revenue sources dedicated to the Transit Investment PAYGO Program are from existing revenue streams transferred from the General PAYGO Fund. There will be no use of property taxes, General Fund operating funds, or other new fees and taxes to fund the City’s support of transit investments such as the Maintenance of Effort (MOE) contribution to CATS and CityLYNX Gold Line operations.

Transit Investment PAYGO Program (\$23.8 million in FY2016)

- **Vehicle Rental Tax (\$11.0 million)** – Revenue generated from the 5% U-Drive-It Vehicle Rental Tax must be used on transit-related operations only. Since the inception of this tax in FY2007, 100% of the revenue has been allocated to the City’s Maintenance of Effort (MOE) contribution to the CATS Transit Enterprise Fund. The dedication of this entire revenue source to the CATS MOE will continue in FY2016 within the separate Transit Investment PAYGO Program.
- **Motor Vehicle License (12.8 million)** – Currently, revenue from \$5 of this \$30 fee is allocated to the General Fund and \$25 is allocated to the General PAYGO Fund. In FY2015, 80% of the \$25 allocation was dedicated to City’s Maintenance of Effort (MOE) contribution to CATS and a transit contribution to the County and Towns. In FY2016, 99.2% of this revenue will be allocated to the Transit Investment PAYGO Program to support the MOE and operating expenses for the CityLYNX Gold Line Phase 1. In FY2017 and all subsequent years, 100% of these revenues will be allocated to the Transit Investment PAYGO Program.

Beginning in FY2019 when Phase 2 of the CityLYNX Gold Line is scheduled to begin operations, the following additional revenue sources will be added to the Transit Investment PAYGO Program:

- **Sales Tax (\$3.6 million)** – A partial transfer from the General PAYGO Sales Tax allocation will be dedicated to the Transit Investment PAYGO Program to support the operating expenses of Phase 2 of the CityLYNX Gold Line. No General Fund operating sales tax or half-cent dedicated Transit Sales Tax revenues will be used for this allocation.
- **CityLYNX Gold Line Fares (\$1.5 million)** – Upon commencement of operations for Phase 2 of the CityLYNX Gold line, the City will begin charging

fares for the full four mile corridor of Phase 1 and Phase 2. Fares are expected to generate \$1.5 million in the first full year, and will be used to continue building a capital reserve for future refurbishment and overhaul of Gold Line vehicles.

Taxes and User Fees

Question 8: *Please provide additional information on Council's 100% User Fee Cost Recovery Policy.*

As part of the FY2006 budget, City Council adopted the 100% fully allocated cost recovery rate for regulatory user fees effective July 1, 2005.

During the FY2005 budget deliberations, Council considered increasing the regulatory user fee recovery rate to an amount greater than the current Council policy of 60%. Council directed the City Manager to appoint a User Fee Stakeholder Committee to review user fees. The Committee made valuable recommendations to improve the regulatory user fee methodology and process. The City Manager recommended increasing the regulatory user fee cost recovery policy from 60% of fully allocated costs to 80% of fully allocated costs in FY06, with an anticipated adjustment to 100% in the following year; Council approved increasing the cost recovery rate to 100% for FY2006.

Question 9: *What is the trend of changes to the Municipal Service District tax rates?*

The following table lists the changes in the five Municipal Service Districts since their inception.

Municipal Service Districts #1, #2, #3, #4, and #5 History of District Tax Rates Fiscal Years: 1979 – 2016					
Fiscal Year	Center City MSD #1	Center City MSD #2	Center City MSD #3	South End MSD #4	University City MSD #5
1979	0.0250	-	-	-	-
1980	0.0250	-	-	-	-
1981	0.0250	-	-	-	-
1982	0.0250	-	-	-	-
1983	0.0250	-	-	-	-
1984	0.0175	-	-	-	-
1985	0.0175	0.0150	0.0300	-	-
1986	0.0175	0.0150	0.0300	-	-
1987	0.0175	0.0150	0.0300	-	-
1988	0.0163	0.0150	0.0300	-	-
1989	0.0163	0.0150	0.0300	-	-
1990	0.0208	0.0150	0.0300	-	-
1991	0.0208	0.0150	0.0300	-	-
1992	0.0208	0.0150	0.0300	-	-
1993	0.0208	0.0150	0.0300	-	-
1994	0.0208	0.0150	0.0300	-	-
1995	0.0208	0.0150	0.0300	-	-
1996	0.0208	0.0150	0.0300	-	-
1997	0.0208	0.0150	0.0300	-	-
1998	0.0208	0.0150	0.0300	-	-
1999	0.0193	0.0140	0.0289	-	-
2000	0.0193	0.0140	0.0289	-	-
2001	0.0193	0.0140	0.0289	0.0900	-
2002	0.0193	0.0140	0.0289	0.0900	-
2003	0.0193	0.0140	0.0289	0.0900	-
2004	0.0174	0.0124	0.0271	0.0668	0.0300
2005	0.0174	0.0124	0.0271	0.0668	0.0300
2006	0.0174	0.0124	0.0271	0.0668	0.0300
2007	0.0174	0.0124	0.0271	0.0668	0.0300
2008	0.0174	0.0124	0.0271	0.0668	0.0300
2009	0.0174	0.0239	0.0386	0.0668	0.0300
2010	0.0174	0.0239	0.0386	0.0668	0.0300
2011	0.0174	0.0239	0.0386	0.0668	0.0300
2012	0.0168	0.0233	0.0358	0.0668	0.0279
2013	0.0168	0.0233	0.0358	0.0668	0.0279
2014	0.0168	0.0233	0.0358	0.0668	0.0279
2015	0.0168	0.0233	0.0358	0.0668	0.0279
Projected 2016	0.0168	0.0233	0.0358	0.0668	0.0279

Question 10: *What would be the impact to the Municipal Service District tax rate if it included City services for special events, and what would be the corresponding reduction to the General Fund?*

Conducting an analysis of City services for special events and other activities within the Municipal Service Districts is included as part of staff's "future work" plan.

In the Q&A document distributed to City Council on May 12th, information is provided on the amount spent by the City for on-duty Police at special events (\$1.64 million). All of these CMPD-supported events are located in Uptown (MSDs #1-3), but due to overlapping geographies, some events may be in two or three MSDs at the same time, requiring an analysis of individual parcels and the calculation of an equivalent tax rate for each of the different MSDs (each MSD has a different tax rate). In addition to City-funded CMPD services for special events in the MSD, additional costs would be evaluated such as Solid Waste Services (e.g. special events garbage and recycling collection as well as street sweeping).

In FY04, approximately \$3.5 million was identified as City funded "special services" in MSDs #1-4 (Uptown and SouthEnd). The types of services and costs have changed between FY04 and FY16, so applying an inflation factor to FY04 would not result in a relevant FY16 cost estimate. No recently analysis has been conducted for City-funded special events services in MSD #5 (University City).

This full evaluation of City funded special events costs in all five MSDs requires collaborative research with City departments, the Mecklenburg County Tax Office, and the two MSD agencies (Charlotte Center City Partners and University City Partners).

The FY2016 recommended tax rates and projected revenues for MSDs #1 - #5 are listed in the following table:

Districts	FY2016 Tax Rates	FY2016 Revenues
District 1 - Center City	1.68¢	\$1,257,608
District 2 - Center City	2.33¢	750,059
District 3 - Center City	3.58¢	1,197,654
District 4 - South End	6.68¢	794,701
District 5 - University City	2.79¢	643,792
Total Projected Revenue for Municipal Service Districts		\$4,643,814

Question 11: *What would be the financial impact of eliminating multi-family solid waste services?*

Solid Waste Services provides two types of multi-family services – curbside rollout for complexes with fewer than 30 units and dumpster compactor service for other multi-family complexes.

In February 2014, the Privatization/Competition Advisory Committee recommended to Council the elimination of multi-family service of 5 or more units. This recommendation followed an in-depth study by an outside consultant that evaluated the provision of multi-family service in Charlotte as well as comparable communities.

If eliminated, the service could not be implemented before January 1, 2016 to give multi-family customers adequate time to work with the City and the private haulers to make the transition to private service delivery. Mecklenburg County lists 10 private companies able to perform the work.

The chart below illustrates the financial impact of eliminating the service. FY2016 represents a partial year of impact, while FY2017 represents a full year of multi-family service elimination.

Complex Service Type	FY2016 Reduction	FY2017 Reduction
Rollout Collection*	\$474,720	\$1,043,435
Dumpster/Compactor	\$2,261,576	\$5,355,795

*Impacts 4 positions filled currently. However, affected employees would be able to transition to other vacancies in Solid Waste Services created by the hiring freeze.

Question 12: *What amount of revenue would be generated if the solid waste fee increased to \$65 or \$186?*

Increasing the Solid Waste Fee from \$47 to \$65 annually for single family residential customers generates \$3.2 million in additional revenue, which recovers the cost of contract escalations and increased equipment maintenance needs.

If the single family residential fee was \$186 per year, it would generate \$35.4 million in revenue to recover the full cost of collection and disposal (this does not include City overhead nor capital costs).

The following table summarizes the full cost recovery fee* and associated revenues for single family, multi-family and small business garbage. Currently, there is no mechanism on the property tax bill to charge separately for different levels of multi-family services.

Full Cost Recovery Scenario*

	Single Family	Multi-Family		Small Business
		Dumpster/Compactor	Curbside Rollout	
Annual Fee	\$186	\$55	\$186	\$250
Revenue Generated	\$35,408,043	\$6,443,830	\$4,084,979	\$593,256

*Does not include capital costs such as refuse collection trucks.

Question 13: *What is the net impact to Commercial Property as a result of the Manager’s proposed tax adjustment and the elimination of the Business Privilege License Tax?*

The elimination of the Business Privilege License Tax has varying impacts to different size businesses operating within the City limits. The BPLT is a gross receipt tax and the amount due is based upon \$0.60 per \$1,000.00 of annual gross receipts up to a maximum amount owed of \$10,000.

The tables below summarize the net impact of the City Manager's proposed tax adjustment and the elimination of the Business Privilege License Tax on Commercial Property.

Large Retail Grocery Store with Increased Property Value	Property Value	Property Tax Rate	Property Tax Levy	BPLT Amount	Tax + BPLT
2011 for FY2012	\$5,006,400	\$0.4687	\$23,465	\$4,574	\$28,039
2015 for FY2016	5,630,500	0.4863	27,381	-	27,381
Property Tax & BPLT Difference	\$624,100	0.0176	\$3,916	(\$4,574)	(\$658)
% Change	12.5%	3.8%	16.7%	-100.0%	-2.3%

Large Retail Department Store with Decreased Property Value	Property Value	Property Tax Rate	Property Tax Levy	BPLT Amount	Tax + BPLT
2011 for FY2012	\$17,812,300	\$0.4687	\$83,486	\$10,000	\$93,486
2015 for FY2016	15,573,800	0.4863	75,735	-	75,735
Property Tax & BPLT Difference	(\$2,238,500)	0.0176	(\$10,492)	(\$10,000)	(\$17,751)
% Change	-12.6%	3.8%	-9.3%	-100.0%	-19.0%

Medium Retail Auto Parts Store with neutral Property Value	Property Value	Property Tax Rate	Property Tax Levy	BPLT Amount	Tax + BPLT
2011 for FY2012	\$915,500	\$0.4687	\$4,291	\$1,363	\$5,654
2015 for FY2016	915,500	0.4863	4,452	-	4,452
Property Tax & BPLT Difference	(\$0)	0.0176	\$161	(\$1,363)	(\$1,202)
% Change	0%	3.8%	3.8%	-100.0%	-21.3%

Small Retail Clothing Store with neutral Property Value	Property Value	Property Tax Rate	Property Tax Levy	BPLT Amount	Tax + BPLT
2011 for FY2012	\$707,600	\$0.4687	\$3,316	\$955	\$4,271
2015 for FY2016	707,600	0.4863	3,441	-	3,441
Property Tax & BPLT Difference	(\$0)	0.0176	\$125	(\$955)	(\$830)
% Change	0%	3.8%	3.8%	-100.0%	-19.4%

The four examples provided all result in a commercial property tax and BPLT net reduction after the City Manager's proposed tax adjustments.

Question 14: *How does the use of a Business Privilege License Tax vary in other states?*

Business privilege license taxes, also referred to as business franchise taxes, have a great deal of variation across the country. There is variation in both how the tax rate is determined and in the method of tax collection; ranging from individual cities collecting business license taxes as a sales tax (which is an option in Arizona), to basing business license taxes on federal taxable income (which is the primary rate determination methodology in New Jersey).

Following the May 13th Council Budget Workshop, staff contacted the University of North Carolina School of Government and the North Carolina League of Municipalities for information on variations in business privilege license tax across the nation. Neither organization has a current inventory of business privilege license/franchise tax practices nationally. Conducting a study across the United States on business privilege license and franchise taxes would require a significant allocation of staff time.

Question 15: *What is the financial impact of reducing the City's 16% fund balance policy by 1% on a one-time basis, and annually?*

The purpose of General Fund fund balance is to provide financial capacity to address emergency needs, unanticipated opportunities, economic/financial shocks, cash flow needs early in a fiscal year prior to receipt of the bulk of property tax payments, and support the City's AAA credit rating.

Council's current fund balance policy reserves 16% of the upcoming General Fund expenditure budget. This level equates to approximately two months of General Fund expenditures. In 2000, the City Council changed the fund balance policy from 10% to 16%. Levels of fund balance above 16% are called "capital reserves" and are made available for one-time appropriations, typically in the General Pay-As-You-Go capital program.

Financial Impacts of Reducing Fund Balance

A 1% reduction to the City's fund balance policy equates to the following:

- \$5.8 million available for one-time expenses
- \$100,000 (approximately) available annually for one-time capital expenditures

Considerations Associated with Potentially Changing the Fund Balance Policy Level

- Rating agencies consistently cite the City's fund balance level as one of the City's key financial strengths.
- The City Manager's recommended budget proposes "Future Budget Work" that includes review of the General Fund fund balance reserve level. This review would compare Charlotte's fund balance level to other AAA rated cities, review best practices, and obtain input from the City's financial advisors and professional financial organizations that recommend appropriate financial policies and practices.

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Taxes

1. Are there any updates from the Governor's Office or General Assembly related to the replacement of lost revenue from the elimination of the Business Privilege License Tax? (March 17th Budget Workshop)

The North Carolina League of Municipalities has had conversations with the General Assembly, but there have not been any revenue replacement proposals to date. Staff will continue to keep Council updated related to any discussions at the State level.

2. Why does the updated property revaluation number result in a more significant impact to the City than to the County? (April 8th Budget Workshop)

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:

Jurisdiction	% Change
Mecklenburg	-1.3%
Charlotte	-2.2%
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%

3. What is the process for property revaluations? (April 8th Budget Workshop)

[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.

4. How are sales tax revenues comparing to projections? (April 8th Budget Workshop)

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%.

5. 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? (April 8th Budget Workshop)

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).

6. What is the process related to property taxes bills that are past due? (April 8th Budget Workshop)

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 1st
- Taxes are due and payable annually on September 1st
- 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 1st, and each month thereafter until the taxes are paid in full
- Delinquent notices are mailed in February and March
- Delinquent taxpayers are advertised in *The Charlotte Observer* in March

In FY2014, the City levied property tax bills totaling \$415.4 million, while the actual revenue collected was \$408.9 million, for a collection rate of 98.44%.

7. 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. (April 8th Budget Workshop)

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
Total	\$2.0 billion

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.

8. Please provide additional information on appeals outstanding? (March 26th Budget Committee Meeting)

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

9. Please provide a breakdown/listing of neighborhoods by major, minor, and acceptable categories? (March 26th Budget Committee Meeting)

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

10. Please provide additional information on public outreach efforts? (March 26th Budget Committee Meeting)

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

11. What is the impact of the proposed property tax rate adjustment proposal by district? What percentage of properties in each district will see a reduction and an increase? (May 6th Budget Workshop)

The following table represents the distribution by Council District of the conversion of the \$47 annual Single-Family Residential Solid Waste Fee to a Property Tax Rate of 1.35¢ to raise an equivalent amount of funds (0.99¢) and to cover higher costs for solid waste operations, recycling, and multi-family service contracts (0.36¢), in addition to the Adjustment of 0.41¢ in

the Property Tax Rate to achieve the "Revenue Neutral Tax Rate" that would have been considered if the initial 2011 Property Assessment Revaluation had been accurate.

Council District	Total Value	Total Count	25th	50th	75th	% Decrease at 80th	# Decrease at 80th
1	\$6,038,519,860	24,092	\$86,600	\$147,100	\$287,700	72%	17,413
2	\$3,544,611,943	31,564	\$71,100	\$100,600	\$131,600	97%	30,669
3	\$3,412,352,200	29,047	\$79,200	\$108,600	\$144,150	99%	28,728
4	\$4,249,560,600	28,899	\$106,100	\$137,200	\$177,000	95%	27,510
5	\$3,136,960,100	26,767	\$91,600	\$110,700	\$131,300	98%	26,203
6	\$10,278,132,300	27,429	\$189,500	\$270,400	\$422,200	49%	13,462
7	\$10,278,767,700	34,493	\$182,500	\$249,200	\$360,500	56%	19,388
Total	\$40,938,904,703	202,291	\$97,600	\$141,100	\$232,500	80%	161,849

The 25th percentile represents the lowest 25% of Single-Family Residential properties, the 50th percentile represents the lowest 50% of Single-Family Residential properties, and the 75th percentile represents the lowest 75% of Single-Family Residential properties.

The Proposed tax adjustment in the Manager's recommended budget would result in a reduction of property taxes and solid waste fees for 80% of Single-Family Residential properties.

User Fees

12. How are the City's Plans Review fees structured, both for the General Fund and Charlotte Water? (February 25th Budget Workshop)

The City charges regulatory user fees to recover the costs associated with providing special regulatory services, such as Plans Review. As part of the FY2006 budget process, City Council adopted a policy to recover 100% of fully allocated costs associated with regulatory services.

However, from July 2008 until June 2012, the Council adopted Plans Review fees were held flat to mitigate impacts from the recession. Effective July 1, 2012, City Council approved a multi-year approach to gradually return to 100% cost recovery. Staff is currently working to calculate a 100% recovery rate for existing plans review fees as part of the City Manager's Recommended Budget for FY2016.

For Charlotte Water, the development of plans review fees is under review as part of the budget process and will also be addressed as a part of the City Manager's Recommended Budget for FY2016. At this time, there is no cost recovery formula built into the Charlotte Water Plans Review fees. The Plans Review fees for Charlotte Water are anticipated, if approved, to include a phased three-year implementation progression to reach 100% cost recovery. This would be needed to provide adequate time and opportunity to work with the development community and other key stakeholders impacted by the new fees.

The table below lists the FY2014 and FY2015 recovery rate for General Fund Plans Review fees in each applicable department:

Department: Regulatory Service	FY2014 Recovery Rate	FY2015 Recovery Rate	Percentage Point Change
Engineering & Property Management: Land Development	75%	79%	4%
Charlotte Department of Transportation: Land Development and Right-of-Way	100%	100%	0%
Charlotte-Mecklenburg Planning Department: Rezoning, Subdivision, Urban Plan and Zoning Administration	65%	76%	11%
Charlotte Fire Department: Fire Code and Plans Review	100%	100%	0%
Charlotte-Mecklenburg Police Department: Adult Businesses, Carnivals, Dance Halls, and Passenger Vehicle for Hire	82%	87%	5%
Neighborhood and Business Services: Zoning Administration	62%	76%	15%
City Clerk's Office: Legal Advertisements for Rezoning Petitions	30%	40%	10%

If the cost recovery formula for all General Fund regulatory user fees was increased to 100% – to include both the land development fees referenced above, as well as other regulatory user fees such as Fire permitting and Passenger Vehicle For Hire fees – this would result in an additional \$2.1 million in revenue to the General Fund for FY2016.

13. What is the current cost recovery rate of the City's various regulatory user fees, including Utility Right of Way fees? (March 17th Budget Workshop)

User fees are charged to those who receive governmental services or use governmental facilities. These fees are categorized as regulatory or non-regulatory.

Regulatory user fees are associated with or incident to a regulatory program, such as land use permits, subdivision reviews, dance hall licenses, and hazardous chemical permits.

- As part of the FY2006 budget process, City Council adopted a policy to recover 100% of fully allocated costs associated with regulatory services. The fully allocated cost recovery model includes both direct and indirect costs. Staff time is an example of direct costs. Facility cost is an example of indirect costs.
- From July 2008 until June 2012, the Council-adopted user fees were held flat to mitigate impacts from the recession.
- Effective July 1, 2012, City Council approved a multi-year approach to gradually return to 100% cost recovery.
- Over the last three years, the average fee increased by 6%; however, due to increases in annual operating costs the recovery percentage moved less than 6%.

Fiscal Year	FY2013	FY2014	FY2015
Recovery Rate	75%	80%	83.3%

- Currently there are no regulatory user fees associated with enterprise fund services. However the development of plans review fees for Charlotte Water is under review as part of the budget process and will be addressed as a part of the City Manager's

Recommended Budget for FY2016. The plan review fees for Charlotte Water are anticipated, if approved, to include a phased three-year implementation progression to reach 100% cost recovery. This would be needed to provide adequate time and opportunity to work with the development community and other key stakeholders impacted by the new fees.

Staff is currently working to calculate a 100% recovery rate for existing regulatory user fees, analyze the market rates of comparable fees, and the impact of bringing user fees to 100% full cost recovery. The table below lists the FY2014 and FY2015 recovery rate for plans review fees in each applicable department:

Department: Regulatory Service	FY2014 Recovery Rate	FY2015 Recovery Rate	Percentage Point Change
Engineering & Property Management: Land Development	75%	79%	4%
Charlotte Department of Transportation: Land Development and Right-of-Way	100%	100%	0%
Charlotte-Mecklenburg Planning Department: Rezoning, Subdivision, Urban Plan and Zoning Administration	65%	76%	11%
Charlotte Fire Department: Fire Code and Plans Review	100%	100%	0%
Charlotte-Mecklenburg Police Department: Adult Businesses, Carnivals, Dance Halls, and Passenger Vehicle for Hire	82%	87%	5%
Neighborhood and Business Services: Zoning Administration	62%	76%	15%
City Clerk's Office: Legal Advertisements for Rezoning Petitions	30%	40%	10%

Per the Utility Right-of-Way Stakeholder process, Utility Right-of-Way fees are calculated based on annual operational costs and actual usage. The fees are billed and collected annually from local utilities, including Charlotte Water. The total Utility Right-of-Way fees billed for FY2015 is \$601,000.

Non-regulatory user fees include all other user fees for City services or facilities that are unrelated to regulations. Examples are fees associated with city-owned cemeteries, or airport landing fees. These fees are calculated using different methods since Council policy does not require non-regulatory fees to recover a specific percentage of the costs incurred by the City agency in provision of the service. Aviation fees, for example, are based on negotiated contracts. The goal for cemetery fee is to be competitive in the market while providing quality, affordable services and stable perpetual care.

14. For which special events does the City charge fees? (April 8th Budget Workshop)

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

15. *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? (April 8th Budget Workshop)*

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://charmeck.org/mecklenburg/county/LUESA/CodeEnforcement/BDC/Pages/BDC%20Quarterly%20Bulletin.aspx>

16. 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? (April 8th Budget Workshop)

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
Commercial Use			
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
Other Mgmt Activities			
ROW Abandonment	By permit-User Fee	\$36,575	100%
Venue Support	None	\$0	0%
Oversized Load Moves	None	\$0	0%
Total Estimated Revenue		\$1,276,657	
*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.

17. How will it be determined which user fees should recover 100% of fully allocated cost, and which should be subsidized by the General Fund? What would 100% recovery generate in revenue? (April 17th Budget Workshop)

City Council originally adopted a fully allocated cost recovery rate of 100% for regulatory user fees with FY2006 Budget. Due to the economic decline, user fees remained at the FY2009 rates through FY2012. Effective July 1, 2012, City Council approved a multi-year approach to gradually return to the fully allocated cost recovery model for regulatory fees. Regulatory user fees are computed based on the annual operating budget and are driven by the complexity of the service, number of units, and amount of staff time. During the last three year, fees increased by an average of 6-7% annually. Some fees even decreased based on number of occurrences, actual costs and staff time for the specific fee. Overall, the cost recovery gap did not close by the same 6-7% annually, as shown in the table below.

Regulatory User Fee Cost Recovery			
FY2013	FY2014	FY2015	FY2016
75.0%	80.0%	83.3%	93.8%

Seven City departments provide regulatory services and assess fees to recover direct and indirect costs. FY2016 Recommended User Fees recoup \$11.8m of \$12.5m costs and provides an additional \$1.4m in revenues. Cost recovery of 100% would generate an additional \$700,000 in general fund revenue, for a total increase of \$2.1m. Three of the seven departments recommended fees reach the goal of 100% full cost recovery for FY2016. Based on the Department Directors' review and City Manager's Office concurrence, the remaining fees that recover less than 100% require further analysis, outreach to the development community, and will utilize a two-year phased approach to reach City Council's goal of 100% recovery. All fees will continue to be reviewed and computed annually.

18. Is it possible to summarize enhancements to user fee services along with the fee rates developed through the budget process? What is the timeline for when the recommendations from the City/County land development permitting study can be implemented? (April 17th Budget Workshop)

FY2016 Recommended Budget includes additional staff in an effort to continue to meet the current high level of regulatory service and is not related to particular recommendations in the Gartner report. FY2016 User Fees include adding one Engineering Project Coordinator in Transportation due to additional workload associated with a 53% increase in Land Development permits since FY2012. Also, in an effort to maintain service goals, recommendations include adding a Plans Reviewer in July 2015 and a Zoning Plans Reviewer in January 2016 for Engineering and Property Management's Land Development division. One of Land Development's metrics is to provide quality service by completing all land development reviews on-time and approving plans within an average of less than 2.5 reviews.

Land Development				
	Goal	FY2013	FY2014	Current Year
Reviews completed on Time	100%	94.0%	93.0%	89.0%
# of Reviews/project	<2.5	1.85	1.93	1.90

Gartner submitted their final report in March 2015 which includes several recommendations within seven identified themes:

- Governance
- Customer Service
- Culture
- Processes
- Technology
- Code interpretation and consistency
- Metrics

The Gartner report included a phased three-year schedule for studying recommendations and implementing improvements. In addition, City and County staff have identified several quick-wins which are currently being pursued with completion expected by December 2015.

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

[Quarterly%20Bulletin.aspx](#)

19. Please provide a chart explaining the impact of user fees. (May 6th Budget Workshop)

The following table depicts seven examples of typical land development fees. The complete list of User Fees by department is included in the User Fee section (pages 123-145) of the FY2016 and FY2017 Preliminary Strategic Operating Plan.

Subdivision, Land Development, and Rezoning Examples	Cost of Service	Current Fee	Recommended FY2016 Fee	% Increase FY2016 Fee	% Subsidy FY2016
Single-Family Subdivision* 10 Acre; 40 Lot	\$23,276	\$18,890	\$22,955	21.5%	1.4%
Commercial Subdivision* 23 acres, 80 Trees	\$31,185	\$23,820	\$27,620	16.0%	11.4%
Commercial Building** 8 acres denuded, 25 trees	\$13,660	\$13,590	\$13,660	0.5%	0.0%
Rezoning Petition*** Major, 10 acres or 2,500 more trips/day	\$13,574	\$5,090	\$9,260	81.9%	31.8%
Sketch Plan Review****	\$670	New fee	\$580	New fee	13.4%
Grading/Erosion Control 8 acres (Engineering only)	\$5,160	\$5,285	\$5,160	-2.4%	0.0%
Detention 8 acres (Engineering only)	\$2,840	\$3,200	\$2,840	-12.7%	0.0%

* Includes Planning, Engineering & Transportation Departments

** Includes Engineering & Transportation Departments

*** Includes Planning, Engineering, Transportation, Clerk & Fire Departments

**** Includes Planning and Engineering Departments

The following table depicts three examples of regulatory user fees, unrelated to development.

Other Regulatory Fees	Cost	Current Fee	Recommended FY2016 Fee	% Increase FY2016 Fee	% Subsidy FY2016
Adult Business-Application Fee	\$3,635	\$2,545	\$2,725	7.1%	25.0%
State Mandated Inspection Fee 10,000 square foot building	\$70	New fee	\$70	New fee	0.0%
Sidewalk Dining Permit	\$225	\$150	\$225	50.0%	0.0%

City Expenditures

20. How does the City budget for fuel costs, and how is fuel purchased for service vehicles? (January 30th Council Retreat)

The City budgets for fuel costs each fiscal year based on actual expenditures in the current and preceding fiscal years, current market conditions, and fuel price projections provided by fuel contractors.

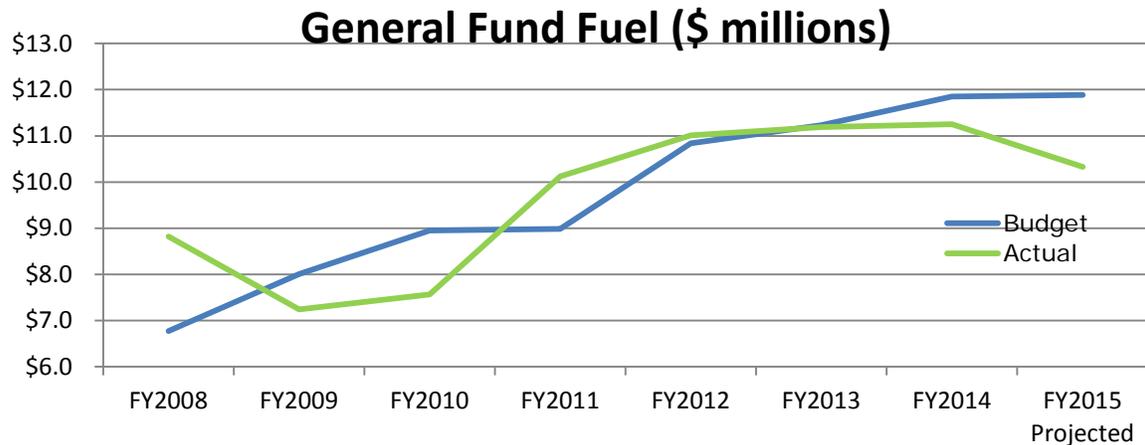
The City currently uses various contractors for the provision of fuel supplies including gasoline, diesel, auxiliary fuels and motor oils. The largest and most commonly used contractor is FuelMan. This City-wide contract is solicited through the Charlotte Cooperative Purchasing Alliance on behalf of the City, County, and other local and national participating agencies. The FuelMan contract allows City workers to use a Fuel Card to purchase fuel at contract prices from retail gas stations throughout the City. FuelMan also provides delivery of bulk fuel supplies for storage at onsite City-owned fuel tanks and generators at various City facilities. The majority of savings in fuel costs in the current fiscal year has occurred through FuelMan contract pricing, which reflects current market conditions.

Below is a summary of the various means for purchasing fuel used by City departments with the largest fleets:

- **Charlotte Mecklenburg Police Department** - uses FuelMan for all vehicles.
- **Charlotte Water** - uses FuelMan for all crew vehicles. FuelMan subcontracts with Mansfield to provide bulk fuel purchases for generators at the various plants, lift and booster stations.
- **Charlotte Department of Transportation** - uses FuelMan for all vehicles.
- **Solid Waste Services** - FuelMan subcontracts with Quick Fuel to provide mobile after-hours fueling for (SWS) vehicles.
- **Charlotte Fire Department** - a separate fuel contract was approved by the Charlotte City Council on November 10, 2014 and is used for all of the Fire Department's emergency and transportation vehicles. The contract provides priority purchasing in high demand situations.
- **Charlotte Area Transit System (CATS)** - fixed price forward purchase contracts are used by CATS to procure Diesel fuel. The program began with a fuel bid designed to purchase both fixed-price and index-price fuel in spring 2009. The first fixed-price fuel agreement was approved April 15, 2009. Over the course of the program's history CATS has had 19 overlapping agreements for fixed-price fuel.

21. How have lower gas prices impacted the City's current year operating budget? (January 30th Council Retreat)

Overall, the City is experiencing operational savings in FY2015 due to falling oil prices. The chart below illustrates actual fuel expenditures incurred by City service departments compared to budgeted amounts over the past several years. FY2015 fuel expenditures for General Fund service departments are projected to be approximately \$1.6 million under budget. The majority of the fuel savings will occur in the Police Department (\$1.3 million), and Fire Department (\$0.1 million), with the remaining savings occurring in various other City departments. These savings in fuel costs will help to offset other unanticipated operating costs in FY2015 such as Fire Department retirement payouts and Police separation allowances.



22. What are the basic expenditure assumptions for the “General Fund Projection Summary” (slide 2 from the February 25th Budget Workshop)? (February 25th Budget Workshop)

The General Fund projected expenditures presented at Council’s February 25th Budget Workshop and the January Council Retreat contain several assumption components. The average annual increase in projected expenditures is 2.63%, outpacing the average annual increase in projected revenues of 1.49%. This is due primarily to the anticipated elimination of the Business Privilege License Tax effective in FY2016. The net impact results in a cumulative four year projected deficit of \$86.7 million as shown in the table below.

	FY2015 Revised	FY2016	FY2017	FY2018	FY2019	Average Annual Increase
Revenues	\$585.7	\$586.5	\$598.2	\$609.7	\$621.4	1.49%
Expenditures	\$585.7	\$602.2	\$617.3	\$633.1	\$649.9	2.63%
Savings/(Gap)	\$0.0	(\$15.7)	(\$19.1)	(\$23.4)	(\$28.5)	
Savings/(Gap) as % of expenditures	0%	(2.6%)	(3.1%)	(3.7%)	(4.4%)	

The following table outlines the assumptions used to populate the expenditure projections:

Description	FY2016 Increase/ Decrease	FY2017 Increase/ Decrease	FY2018 Increase/ Decrease	FY2019 Increase/ Decrease
Public Safety Pay Plan Steps	2.5%- 5.0%	2.5%- 5.0%	2.5%- 5.0%	2.5%- 5.0%
Public Safety Pay Plan Market Adjustment	1.5%	1.5%	1.5%	1.5%
Employee Merit	3.0%	3.0%	3.0%	3.0%
Employee Health Insurance	9.0%	9.0%	9.0%	9.0%
Law Enforcement Employee Retirement	(4.9%)	3.0%	3.0%	3.0%
Firefighter Retirement	0.0%	3.0%	3.0%	3.0%
Employee Retirement Contribution	(7.0%)	3.0%	3.0%	3.0%
Risk Management	0.0%	1.0%	3.0%	3.0%
Operating Expenses	1.5%	1.5%	1.5%	1.5%
Solid Waste Contracts	\$2,200,000			
Law Enforcement Separation Allowance	\$2,000,000	\$450,000	\$500,000	\$500,000

23. What types of competitive pricing practices does the City use as part of its procurement practices? (April 8th Budget Workshop)

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

24. What is the status of the City/County Real Estate ledger? (April 8th Budget Workshop)

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.

25. For the list of expenditure line item reductions, what is the percentage of total budget for each reduction category? (April 17th Budget Workshop)

The following table lists the amounts for each recommended FY2016 Expense Reduction, showing the percentage change of the reduction from the total budget for that category.

Expense Reductions			
Reduction Category	Financial Impact	FY2016 Budget General Fund Category	% of General Fund Category Budget
Technology/Telecommunications	\$843,084	15,415,708	5.5%
Equipment Maintenance/Accident Repairs	801,141	20,303,573	3.9%
Retirement Payout Reserve	500,000	1,500,000	33.3%
Fuel	470,534	10,487,133	4.5%
Travel, Training & Educational Reimbursement	397,104	2,809,274	14.1%
Contracted Services	303,283	38,824,211	0.8%
Frozen Positions	216,568	216,568	100.0%
Vacant Positions (long time vacancy)	165,873	165,873	100.0%
Temporary Positions/Overtime	149,950	7,582,364	2.0%
Utilities	145,340	14,617,705	1.0%
Other	129,203	129,203	100.0%
Uniforms	102,600	3,241,815	3.2%
Council Discretionary	100,000	200,000	50.0%
Printing, Postage, & Advertising	55,105	2,815,128	2.0%
Office/Operating Supplies	48,803	5,610,295	0.9%
Subsistence	45,212	307,186	14.7%
Public Education	41,447	870,508	4.8%
Dues & Subscriptions & Memberships	25,232	962,433	2.6%
	\$4,540,479	\$126,058,977	3.6%

26. For the current (FY2015) and proposed (FY2016) Budgets, what comprises the total budget for contracted services? (April 17th Budget Workshop)

The FY2015 Revised Budget includes \$36,647,105 in General Fund Miscellaneous Contracted Services. In FY2015 there are 152 individual contracted services accounts budgeted in the General Fund across all City departments. Eleven of the 152 contracted services accounts total \$23,233,701, which represents 63% of the General Fund total FY2015 contracted

services budget. The remaining \$13,413,404 consists of numerous small and mid-size professional services contracts for things such as graphic design, court reporters, legal services, and other specialist services; specialty equipment; and software licenses for General Fund departments and divisions.

The FY2016 Recommended Budget includes \$38,520,928 in General Fund Miscellaneous Contracted Services (net of expense reductions shown in Question 6 above). In FY2016 there are 145 individual contracted service accounts budgeted in the General Fund across all departments. Eleven of the 145 contracted services accounts total \$26,153,574, which is 68% of the total FY2016 contracted services budget. The table below lists the largest contracts that constitute the majority of the FY2016 contracted services budget. The remaining \$12,367,354 consists of numerous small and medium-size professional services contracts for things such as graphic design, court reporters, legal services, and other specialist services; specialty equipment; and software licenses for General Fund departments and divisions.

Department/Division	Contracted Services Description	FY15 Budget Amount	FY16 Budget Amount
Solid Waste Services	Recycling Contract	\$ 4,558,770	\$ 5,945,186
Solid Waste Services	Multi-Family Contract	2,931,868	3,722,335
Non-Departmental	Mecklenburg Towns Tourism Contribution	2,993,069	3,236,719
Non-Departmental	Arts & Science Council Financial Partner Contribution	2,940,823	2,940,823
Innovation & Technology/ Technology Communication Services	Public Safety Radio Infrastructure Maintenance	2,487,019	2,487,019
Engineering & Property Management/Landscape Management	Citywide Landscaping	2,166,936	2,062,418
Innovation & Technology	Help Desk Services	887,250	1,502,229
Solid Waste Services	Roll-Out Cart Contract	1,021,350	1,107,324
Engineering & Property Management	CMGC Janitorial and Security	1,072,000	1,073,190
Management & Financial Services/Finance Revenue	Utility bill generation, electronic bill payment, and utility bill collections	1,165,336	1,067,051
Charlotte Department of Transportation	Park It! services including, collection, pay by cell, and on-street parking	1,009,280	1,009,280
Numerous General Fund Departments and Divisions	Nearly all General Fund Operating Budgets include a Miscellaneous Contractual Services account. This account covers professional services, specialty equipment, and software licenses across the organization.	13,413,404	12,367,354
Total		\$ 36,647,105	\$ 38,520,928

27. Please provide examples of budget reductions made over the past several years. (April 17th Budget Workshop)

The following summarizes the budget reductions over the past 20 years:

- FY93 – Rightsizing eliminated 263 positions
- FY03-06 – Annual budget reductions and service cuts amounting to over \$15 million
- FY09 Mid Year - Subsequent to the financial crisis in the fall of 2008, the City realigned expenditures with anticipated revenues, strengthening the position of the City to weather potential, further economic deterioration. Highlights include:
 - \$9.0 million in General Fund net expenditure savings were isolated and set aside to offset anticipated General Fund revenues being \$4.5 million below budget. All General Fund departments were given new, lower budget requirements.
 - \$12.0 million in capital reserves were set aside in the event of future economic deterioration.
 - Contracts considered non-essential to the continuity of service delivery were put on hold.
 - All non-essential travel was eliminated.
 - Continued monitoring of fuel consumption and alternative service delivery methods.
- FY10 – The severe economic downturn dominated budget considerations:
 - \$6.5 million in FY09 General Fund cuts carried forward into FY10
- FY11 – Departments produced 48 budget reductions resulting in \$7.7 million in savings, including:
 - Service Reductions
 - E.g. reductions to Solid Waste Service’s unscheduled bulky item pick-up service and reduction of CharMeck 311 service hours)
 - External Agency Reductions
 - Elimination or reduction of funding to non-City of Charlotte agencies
 - Internal Efficiencies
 - E.g. streamlining of service provisions in areas such as single stream recycling, reorganization of the City’s Real Estate Division, and mitigation of Police overtime costs
 - Internal Cost Transfers
 - E.g. shifting of costs from the General Fund to other City funds such as tree removal and trimming to Pay-As-You-Go capital
 - Other
 - Reduction of City’s contribution to non-public safety employee 401 (k) program from 3% to 2%
- FY13 – Operating budget reflects slow growth following economic recession, weathered by the City through budget reductions and a continuation of conservative financial strategies. Highlights include:
 - Operating budget line items are predominately held flat
 - Elimination of multi-family supplemental disposal payments with corresponding reduction of annual City fee
 - Implement new Public Safety Pay Plan structure that is more sustainable with slower pay plan growth rates following Mayor’s Efficient & Effective Government Task Force findings and recommendations
- FY14 – Budget focuses on addressing the growing community’s service and infrastructure needs:
 - Operating budget line items are predominately held flat, with minor adjustments for fuel, maintenance, and training for Police and Fire

28. Have we charged every fee possible to the enterprise funds? Is the General Fund subsidizing the enterprise funds in any way? (May 6th Budget Workshop)

The General Fund is not subsidizing the Enterprise Funds. Enterprise Funds are currently being charged all allowable indirect costs in accordance with the requirements of Federal OMB Circular A-87. All direct costs are explicitly charged to the Enterprise Funds.

29. Why is there an increase in the Government Center rent expense? Is there a plan to fill the building to reduce this expense? (May 6th Budget Workshop)

In FY2015, the Community Relations division of the City Manager's Office moved from Old City Hall into the Belmont Community Center. Community Relations conducts mediations that require the use of meeting rooms on a regular basis. Old City Hall does not have sufficient available meeting room space to meet the needs of Community Relations. Community Relations moved from Old City Hall when space became available in the City-owned Belmont Community Center with sufficient facilities for staff and meeting rooms. The rent budget for the Old City Hall space vacated by Community Relations is \$80,236. With no new tenant selected to move into the vacated space in Old City Hall, the budget for that rent was transferred to the General Fund Non-departmental budget for unallocated space. Building Management staff is currently working on identifying potential new tenants for the vacated space, and the \$80,236 rent costs will be reallocated to the operating budgets of the department assigned to the space.

30. What would be the financial impact of a 10-20% reduction to financial partners, holding each Council Member to \$10,000 in travel and reducing council discretionary to \$50,000? (May 6th Budget Workshop)

There are three financial partners that receive General Fund discretionary allocations. Those three partners and the impact of 10% and 20% reductions are provided in the following tables.

10% Reduction to Financial Partners			
Financial Partner	FY16 Recommended Operating Budget	10% reduction	Total Allocation
Arts & Science Council	\$2,940,823	\$294,082	\$2,646,741
Safe Alliance (formerly United Family Services)	333,977	33,398	300,579
Community Building Initiative	50,000	5,000	45,000
Total	\$3,324,800	\$332,480	\$2,992,320

20% Reduction to Financial Partners			
Financial Partner	FY16 Recommended Operating Budget	20% reduction	Total Allocation
Arts & Science Council	\$2,940,823	\$588,165	\$2,352,658
Safe Alliance (formerly United Family Services)	333,977	66,795	267,182
Community Building Initiative	50,000	10,000	40,000
Total	\$3,324,800	\$664,960	\$2,659,840

Currently the City budgets approximately \$119,348 per year for Council travel, \$72,500 for discretionary travel and \$46,848 for National League of Cities functions. The Mayor and Council spend approximately \$100,000 per year on travel. The proposal to provide each City Council Member with a \$10,000 travel budget would result in no change to the operating budget, however could impact Council members representing the City on national boards or committees.

In the FY2014 and FY2015 budget, \$200,000 was allocated to the City Council Discretionary Account for unanticipated projects that may occur during the year that City Council may wish to fund. No expense requests were made in FY2014. As of May 4, 2015, the full balance of \$200,000 remains in the account as City Council has not made any expense requests in FY2015.

In the Manager's Recommended Budget, the City Council Discretionary Account was reduced to \$100,000 for FY2016 and FY2017. Reducing the account to \$50,000 would further reduce the amount of funding City Council could use towards unanticipated projects they wish to fund in FY2016.

31. What methodology is used to determine how the business incentive grant line-item is budgeted? (May 6th Budget Workshop)

The City's Business Investment Grant (BIG) Program was created in 1998, in partnership with the County, to encourage the attraction, retention, and/or expansion of businesses and jobs. BIG provides grants to companies based upon the amount of new property tax generated by the private business investment made. BIG requires companies to meet thresholds for capital investment, new jobs, and wages. BIGs are often used as a required match to State incentives. The BIG program aligns itself with local Smart Growth, Transit, and Business Corridor Revitalization Strategic Plans.

Grant recipients are encouraged to hire residents of Mecklenburg County and to use local small, minority, and women owned businesses when such goods or services can be obtained at competitive prices.

The methodology used to calculate how much to budget for each BIG is based on the projected amount of investment that the company has certified it will make each term of the grant. After the BIG is approved by City Council, the initial payment is based on comparing property taxes paid with the baseline property taxes prior to the company's additional investment. This incremental property tax increase is then multiplied by either 50% or 90% based on the terms of the company's grant. This increase is used as a basis for the first year's payment with the City returning its prorated share based on the city tax rate and the County returning its prorated share based on the county tax rate. In future years, City staff contacts the grantee to determine if subsequent payments will increase or decrease as

property taxes may fluctuate. Hence, the sum of these calculated payments determine the budget for each BIG. All of these amounts will be offset by increased taxes paid by the businesses.

32. How much is budgeted for town halls and community meetings hosted by Council Members? (May 6th Budget Workshop)

In FY2015, the City budgeted \$800 per Council member for town hall and community meetings. The FY2016 & FY2017 budget recommends \$400 per Council member based on actual expenditures from FY2015.

33. What would be the impact of reducing Innovation and Technology's budget to \$20 million (a reduction of \$4,504,208)? What would be the impact of reducing the City Manager's Office budget to \$13 million (a reduction of \$851,563)? (May 6th Budget Workshop)

Innovation and Technology

Innovation & Technology's (I&T) expenditures for FY2016 are \$24,504,208. A reduction to \$20,000,000 is an 18.4% decrease in the overall budget. The existing I&T budget is divided between Personnel (46% of expenditures) and Operating (54% of expenditures) because I&T purchases goods and services on behalf of the entire City government. A reduction of this magnitude would significantly impact core city-wide Innovation & Technology services and operations as well as impair the functions of every department that uses information technology.

The following items are examples of services that would be impacted if this reduction was to occur:

- City-wide and Core Innovation & Technology functions
 - City wide network functions would be significantly impacted as this reduction would delay replacing aging infrastructure which would suffer more frequent failures and breaks in service. These services affect all City departments; however, reductions cannot be made in all areas in an across the board fashion. For instance, an 18% cut in Microsoft licenses would result in turning off at least 18% of computers for City workers. This is not a feasible solution. Thus requiring even greater reductions in other areas.
 - I&T is responsible for the Information Security of the City's networking infrastructure, the protection of Personally Identifiable Information of Charlotte citizens (PII), HIPPA data, credit card transaction data (PCI) and Criminal Justice Information data (CJIS). In the course of a typical day the City experiences hundreds of cyber-attacks aimed at the infrastructure and the above listed data types. As referenced by some recent computer security breaches at Target, Home Depot, PF Chang's, and the White House the importance of solid Information Security is paramount to maintaining City operations. Budget reductions in these areas would be catastrophic for all City operations if there is a failure to protect the City's information systems.
 - Service desk assistance for computer problems would be reduced which would impair the efficiency of city workers and potentially compromise personnel serving after regular working hours and on weekends.

- Innovation & Technology department-specific impacts
 - An 18% reduction to the I&T budget affects every City department as they depend heavily on information, data and communications services. Here are a few examples of functions that would be potentially impacted:
 - The quality and speed of police car communications will be reduced for both voice and data modems which support information in CMPD vehicles. These capabilities were recently upgraded by the BTOP project. Failure to maintain these improvements will cause the City to break its BTOP grant commitments.
 - Fire vehicles depend on the City's computer aided dispatch systems, vehicle routing systems and public safety communications. These systems would be susceptible to greater down times as we would not be able to support their needs as frequently leading to longer response times by Fire personnel.
 - The Management & Financial Services Department payroll and financial accounting systems which rely on the I&T Enterprise Resource Planning (ERP) systems would suffer downtimes and extended processing times for paying vendors. If data is lost, the integrity of the City's accounting system could be threatened leading to complications in the annual audit and/or future bond rating assessments.
 - CDOT's traffic signal system runs on the I&T network. Extended downtimes or failures in the network could produce traffic snarls and poor traffic flow on the City's street network.
 - Citizen information services provided by 311 would be negatively affected when customer service computer systems are not maintained adequately. Customer Service Representatives would be unable to access information to answer questions or reliably take citizen requests and respond to them.
 - Solid Waste Services depends on I&T GIS information for routing of garbage trucks. Without regular updates to the GIS system and maps, efficient routing of trucks will become more difficult.
 - CATS depends on I&T GIS information for bus routing to better meet demands of travelers and maximize ridership and fare revenue.
 - The City has binding Inter-local Agreements for public safety communications with City of Gastonia, Cabarrus, Union and Stanly Counties that would be very difficult to retract. Thus, we would have to fully fund this service meaning other services would be reduced more to meet the asked for reduction.

In summary, further reductions to the Innovation & Technology Department would result in decreased service efficiencies in almost all City departments and drastically reduce the effectiveness of services to Charlotte citizens in a number of key areas including public safety, transportation, and solid waste services. Technology solutions are imbedded in almost everything the City does, multiplying the size, complexity, and scope of the Department's work. The City's ability to pursue new technologies in response to City department needs and citizen demands would be compromised. Lastly, I&T would be forced to lay off staff and eliminate non-critical services in order to meet this reduction.

City Manager's Office

The City Manager's Office is comprised of four divisions: 1) City Administration, 2) Corporate Communications & Marketing, 3) Community Relations, and 4) CharMeck 311. The FY2016 Recommended City Manager's Office budget is reduced by \$815,901 from the FY2015 Budget. The budget and full time equivalent positions (FTE) reductions are outlined in the following table:

City Manager's Office FY2016 Budget Reductions			
Division of City Manager's Office (CMO)	Item	FY16 \$ Change	FY16 FTE Reduction
City Manager Administration	Technology	2,000	
City Manager Administration	Other Specialty Department Supplies	800	
City Manager Administration	Dues & Subscriptions	2,850	
City Manager Administration	Cell Service & Mobile Technology	3,712	
City Manager Administration	Subsistence	7,500	
City Manager Administration	Travel, Training and Meetings	20,000	
City Manager Administration	Temporary Position	2,100	
City Manager Administration	Office Assistant IV (vacant) position planned to be used for Records Mgr.	54,415	1.0
Total Reductions for CMO Admin		93,377	1.0
Corporate Communications & Marketing (CC&M)	Social Media to increase community engagement	3,000	
(CC&M)	Program/Service Awareness through social media	7,500	
(CC&M)	Veteran's Day Specialty Supplies	2,000	
(CC&M)	Media Training	2,500	
(CC&M)	Travel, Training and Meetings	6,000	
(CC&M)	Printing & Publishing	7,500	
(CC&M)	Dues & Subscriptions	3,000	
(CC&M)	Digital Signage	5,000	
(CC&M)	TV Engineering Services	13,500	
(CC&M)	Video Services & Graphic Designer Contracts	10,000	
(CC&M)	25 JIC phone lines	3,600	
Total Reductions for CMO CC&M		63,600	
CharMeck 311	Adjust hours of operation from 7am-8pm to 7am-7pm and close weekends and holidays)	658,924	11.0
Total Reductions for CMO CM311		658,924	11.0
Grand Total City Manager's Office Reductions		815,901	12.0

While all General Fund Departments were asked to identify cuts of 3-5%, the City Manager's Office made cuts totaling 5.5% of its budget; more than double any other General Fund department (excluding Engineering & Property Management which accomplished a cut of 9.2% primarily through the transfer of cultural facility operating and maintenance costs to the Tourism Fund).

Provided in the following table are options for further cuts to the City Manager's Office budget, totaling to \$434,865. This could increase the total reductions in the City Manager's

Office to 8.5% from FY2015 to FY2016. Any further reductions to the City Manager's Office budget beyond those shown below would result in employee layoffs.

Potential Additional Reductions to City Manager's Office FY2016 Budget			
Division of City Manager's Office	Item	FY16 \$ Change	FY16 FTE Reduction
CharMeck 311	Further reduce 311 operating hours to 8 hour shifts covering the hours of 8am-5pm, Monday-Friday, through attrition (significant reduction in service)	287,784	6.0
Community Relations	Contractual services for moving expenses absorbed in current year budget	25,000	
Corporate Communications & Marketing (CC&M)	Eliminate funding for webmaster position (vacant)	73,081	
CC&M	Eliminate City campaign creative promotions (i.e. smoke free facilities campaign, etc.)	22,000	
CC&M	Eliminate web search optimization (will make Charlotte website less frequently found on Google)	3,000	
CC&M	Cut training in half (will decrease skill development of employees)	10,000	
CC&M	Eliminate web analytics tool (will hamper ability to analyze website users)	9,000	
CC&M	Cut print materials in half (will require greater digital communication use)	5,000	
Total		434,865	6.0

34. Are there any state responsibilities that the City is budgeting to pay for in the Preliminary FY2016 Operating Budget? (May 6th Budget Workshop)

The Charlotte-Mecklenburg Police Department (CMPD) is the only department that includes state responsibilities for FY2016, funding three programs: 1) the Court Services Unit, 2) the District Attorney Property Crimes Unit, and 3) State Justice Services for Drug Court.

Below is a brief description of the services and budget for each of these three programs:

- 1) Court Services Unit
 - FY2016 Operating Budget = \$1,266,426
 - The Court Services Unit provides administrative assistants and detectives to the Mecklenburg County District Attorney's Office and the local Public Defenders' Office to assist in managing the Grand Jury system, issuing subpoenas and indictments, setting trial court calendars, and providing clerical support to judges.
- 2) District Attorney's Property Crimes Unit
 - FY2016 Operating Budget = \$321,173

- Program provides 2 Assistant District Attorneys and 3 support personnel for the Property Crimes Unit. The objective of this unit is to reduce the time for disposition of property cases, and to obtain the appropriate punishment for habitual offenders.
- 3) State Justice Services for Drug Court
- FY2016 Operating Budget = \$58,000
 - The City and County split the cost of providing the County's State Justice Services for Drug Court. This program is comprised of a specialized team of assistant district attorneys that concentrate solely on felony drug cases.

Pay & Benefits

35. What is the distribution of budgeted positions between the Broadband and Public Safety Pay Plans? (March 17th Budget Workshop)

The Table below shows the distribution of the City's budgeted positions between the Broadband and Public Safety Pay Plans. The positions within each Pay Plan are further grouped according to Job Categories.

Job Category	Budgeted Positions	% of Total Budgeted Positions
Broadband Positions (non-sworn/uniformed)		
Clerical/Admin. Support	740.50	10.3%
Executive/Official	75.00	1.0%
Professional/Mid Management	1,269.00	17.7%
Protective Services	148.00	2.1%
Service Maintenance	261.00	3.6%
Skilled Craft	1,201.75	16.7%
Technicians	640.00	8.9%
Broadband Total Positions	4,335.25	60.4%
Public Safety Positions (sworn/uniformed)		
Police Sworn Rank	1,788	24.9%
Police Sworn Management	20	0.3%
Fire Uniformed Rank	1,001	13.9%
Fire Uniformed Management	38	0.5%
Public Safety Total Positions	2,847	39.6%
Total Budgeted Positions	7,182.25	

36. Why does the retirement contingency grow by \$0.5 million each year for the next two years? (May 6th Budget Workshop)

With the exception of the Charlotte-Mecklenburg Police Department and the Charlotte Fire Department, General Fund departments do not typically budget for retirement payouts. While the Charlotte-Mecklenburg Police Department and Charlotte Fire Department budget for retirement payouts, neither department is funded at a level to fully absorb the projected number of retirements. The retirement contingency was established as a non-departmental account to assist departments that did not have adequate funding to cover retirement expenses.

The rate at which the Public Safety Pay Plan employees are retiring has increased steadily over the past few fiscal years and is projected to continue to increase significantly in FY2016 and FY2017. The Charlotte-Mecklenburg Police Department has budgeted \$1,075,000 for retirement payouts and the Charlotte Fire Department has budgeted \$650,000 for retirement payouts. While the amount each department has budgeted is significant, these amounts do not cover either department's projected retirement payout expenditures for FY2016. The requested \$0.5 million increase in the retirement contingency will be used to help pay the actual increased amounts that are in the departmental budgets (Fire, Police, and other General Fund departments), due to the impact of rising retirement rates. The table below outlines the number of Public Safety Pay Plan employees that will be retirement eligible in FY2016.

Department	FY2016 Retirement Eligible Employees	FY2016 Estimated Number of Retirements*	FY2016 Projected Retirement Expenses	FY2016 Retirement Budget
Fire	127	50	\$1,404,178	\$650,000
Police	289	69	\$1,450,000	\$1,075,000
Retirement Contingency				\$1,000,000
Total	416	119	\$2,854,178	\$2,725,000

* Estimated retirement numbers are based on the average of historical retirement rates

37. Please provide benchmarking of employee pay increases using cities of comparable size. (May 6th Budget Workshop)

The City of Charlotte benchmarks compensation with several categories of employers, including national municipalities of comparable size. The following chart provides all benchmarks including "National Municipalities," which is comprised of approximately 30 jurisdictions, including: Atlanta, GA; Austin, TX; Boston, MA; Columbus, OH; Kansas City, MO; Louisville, KY; Nashville/Davidson County, TN; Oklahoma City, OK; Raleigh, NC; Virginia Beach, VA.

Market Movement Summary
(Average Change)

Source	2012 Actual Market Movement	2013 Actual Market Movement	2014 Actual Market Movement	2015 Actual Market Movement	2016 Projected Market Movement (to date)	5 Year Average Market Movement
National Statistics Provided by World at Work, Hewitt, Mercer	2.9	3.0	2.9	3.0	3.0	3.0
National Municipalities	1.5	1.7	2.4	2.7	1.6	2.0
Charlotte Area Municipalities	2.3	2.8	2.6	2.6	2.8	2.6
Large Charlotte Employers (private sector)	2.4	2.5	2.5	2.7	2.9	2.6
The Employers Association	2.7	2.6	3.1	3.1	3.1	2.9
City of Charlotte	3.0	2.0	2.0	3.0	1.5	2.3

* In the FY12 Budget, City Council authorized the City Manager to grant to employees a one-time lump sum payment up to 1%, based on meeting organizational savings targets for FY2011, which is not included in average.

38. Has the City had any terminations based on performance? (May 6th Budget Workshop)

During calendar year 2014, there were 74 terminations.

39. Please provide the mean and median salaries for full-time City employees. (May 6th Budget Workshop)

Pay Plan Type	Average Salary	Median Salary
City of Charlotte Full-time Employees	\$57,001	\$54,755
City of Charlotte Full-time Employees exclusive of Public Safety Pay Plan Employees	\$54,096	\$46,940

Public Safety

40. What is the current budget gap associated with Police Separation Allowance Payments? Is staff developing options to close the budget gap and cover projected future year costs associated with those payments? (January 30th Council Retreat)

Charlotte Mecklenburg Police Department (CMPD) sworn officers are entitled to a "separation allowance" benefit, as defined in GS 143-166.41-50. The special separation allowance is available to local and state law enforcement officers if they retire on a service retirement allowance (thirty years of service, or age 55 with 5 years of service). The separation benefit is a predetermined monthly allowance (based on years of service and last annual salary) that is payable from the time the officer retires until the officer reaches age 62 (the point at which the officer reaches social security eligibility).

For FY2015, CMPD has a budget of \$2,250,000 for all Sworn Officer Separation Allowance Payments, whereas actual expenditures are estimated to be approximately \$4,000,000. Prior to FY2014, CMPD had been able to absorb the unbudgeted costs for separation allowance

through various personal services savings. In prior years, the Police budget produced enough salary savings to cover specific line-item overages in sworn officer Separation Allowance Payments.

CMPD's current staffing model calls for the department to be at full staffing levels at all times. Due to the Sworn Officer Separation Allowance Payments, full staffing has been unattainable. The budget adjustments required to cover the Separation Allowance Payments have made it difficult for CMPD to complete the necessary number of recruit classes to constitute full staffing levels. CMPD currently schedules three recruit classes per year, but would like to hold four classes per year to keep up with the current retirement and turnover rate.

In accordance with retirement payouts, the City Manager has asked a full review be conducted to determine the City's future expenses related to these items. During the FY2016 budget planning process, the Department of Management & Financial Services/Office of Strategy & Budget and CMPD will work together to identify options for closing the separation allowance funding gap.

An actuarial study, commissioned by the City, clearly shows that separation allowance will continue to be a challenge for future CMPD budgets as the payments continue to climb approximately \$500,000 annually from FY2016-FY2020. The table below shows the projected annual Separation Allowance Payments through 2063.

Actuarial Study					
	Number of Participants			Projected Benefit Payments	
December 31,	Actives	Retirees	Total		
2013	1,829	207	2,036	\$	3,749,198
2014	1,849	207	2,056	\$	3,831,546
2015	1,869	214	2,083	\$	3,967,493
2016	1,890	240	2,130	\$	4,476,779
2017	1,911	266	2,177	\$	4,916,410
2018	1,932	282	2,214	\$	5,335,206
2019	1,953	311	2,264	\$	5,870,246
2020	1,975	330	2,305	\$	6,334,278
2021	1,996	339	2,335	\$	6,658,340
2022	2,018	348	2,366	\$	7,019,600
2023	2,040	363	2,403	\$	7,521,326
2024	2,063	379	2,442	\$	8,126,225
2025	2,086	372	2,458	\$	8,286,959
2026	2,109	363	2,472	\$	8,472,843
2027	2,132	353	2,485	\$	8,640,801
2028	2,155	340	2,495	\$	8,663,509
2029	2,179	325	2,504	\$	8,556,220
2030	2,203	301	2,504	\$	8,133,009
2031	2,227	268	2,495	\$	7,471,025
2032	2,252	241	2,493	\$	6,859,044
2033	2,276	208	2,484	\$	6,123,979
2034	2,301	195	2,496	\$	5,900,965
2035	2,327	182	2,509	\$	5,659,528
2036	2,352	178	2,530	\$	5,662,350
2037	2,378	181	2,559	\$	5,886,199
2038	2,404	186	2,590	\$	6,242,677
2039	2,431	191	2,622	\$	6,628,908
2040	2,458	198	2,656	\$	7,137,479
2041	2,485	206	2,691	\$	7,639,193
2042	2,512	208	2,720	\$	7,974,032
2043	2,540	215	2,755	\$	8,482,714
2044	2,567	215	2,782	\$	8,637,304
2045	2,596	218	2,814	\$	8,951,728
2046	2,624	218	2,842	\$	9,186,734
2047	2,653	221	2,874	\$	9,513,427
2048	2,682	234	2,916	\$	10,290,345
2049	2,712	247	2,959	\$	11,116,952
2050	2,742	252	2,994	\$	11,669,381
2051	2,772	258	3,030	\$	12,305,531
2052	2,802	266	3,068	\$	13,108,407
2053	2,833	270	3,103	\$	13,740,387
2054	2,864	273	3,137	\$	14,367,262
2055	2,896	275	3,171	\$	14,944,171
2056	2,928	277	3,205	\$	15,554,905
2057	2,960	279	3,239	\$	16,179,107
2058	2,992	280	3,272	\$	16,780,499
2059	3,025	280	3,305	\$	17,377,966
2060	3,059	281	3,340	\$	17,994,976
2061	3,092	281	3,373	\$	18,637,815
2062	3,126	282	3,408	\$	19,342,346
2063	3,161	282	3,443	\$	20,083,623

41. What types of emergency calls comprise the 4,390 calls experienced by Fire Station 42 in 2014? (January 30th Council Retreat)

The Eastland Mall area has some of the highest emergency call volumes in the City. The majority of the calls in this area are answered by Station 42, which currently houses a single engine company. The Charlotte Fire Department has requested an additional engine company at Station 42 in their FY2016-2017 annual operating budget, this request was discussed as part of the Budget Outlook Report presentation at the January 30 Council Retreat. During the Retreat discussion, the City Council requested a list of the number and types of calls received at Station 42 in FY2014. The table below shows the distribution of calls by type.

Call Type (Engine 42)	Type Count	% of Total Calls
Fire	179	4.08%
False Alarm	228	5.19%
Motor Vehicle Accidents	277	6.30%
Rescue	747	17.02%
Other (Chemical Leaks, Fuel Spills, Weather Events)	852	19.41%
Emergency Medical Services	2,107	48.00%
TOTAL	4,390	100.00%

42. One of the "Budget Reduction Alternatives" listed in the FY2016 & FY2017 Preliminary Strategy Operating Plan, but not recommended by the City Manager, is the elimination of the Police helicopter unit, which includes two helicopters. What would be the expected service level changes resulting from full elimination of the helicopter unit? Is it possible to retain half of the Police helicopter unit? (May 6th Budget Workshop)

The Charlotte Mecklenburg Police Department (CMPD) currently provides Police helicopter operational services through the maintenance and use of two Bell model 407 helicopters. Impact of Eliminating Helicopter Unit (two helicopters)

In the CMPD helicopter unit (two helicopters) was eliminated, multiple areas operations areas would be affected as detailed in the following section

- Officer safety – Helicopters divides the attention of suspects and alerts the violator of the unlikelihood of escape, which reduce assaults and injuries to officers.
- Directed patrol – Helicopters provide a large oversight on locations that are of concern to patrol divisions. Each week, the aviation unit is assigned locations to provide zone checks based on the previous week's criminal activity.
- Search for suspect – The aerial vantage gives the helicopter 15 times the surveillance capacity of a ground unit. It can quickly establish a perimeter, often pinning down a suspect until a K-9 or other ground officer affects the arrest. CMPD helicopters are equipped with an Airborne Image Processing System, which can measure and display extremely small differences in heat emissions between objects. At night, this is the primary search tool. The system assists in locating a 'target' (suspect, vehicle or scene) and then automatically illuminates with a search light whatever is being

tracked, allowing ground units to see what Aviation sees. The video downlink can transmit the displayed image to a central or ground-based receiver for remote command and control, while an onboard DVR records it for evidence.

- Vehicle pursuits – High-speed vehicle pursuit is unnecessary when a helicopter/car team is on patrol. It is difficult for a suspect vehicle to lose a helicopter. This allows the patrol car to back off to a slower speed and reduce risk to officers and citizens.
- Major Event Command and control – The helicopter can climb above obstacles to quickly assess an entire situation, i.e., events, disasters, civil disorders, etc. Tactical/Rescue personnel, cargo or supplies can be carried to the scene, above obstacles that cause delays. The public address system enables the crew to broadcast important information to people in a neighborhood regarding evacuation or other pertinent matters.
- Special teams – The helicopter can rapidly deploy Special Operations resources, such as K9, to a location and then withdraw the force when the action is complete.
- Criminal surveillance – The helicopter can provide a unique manner of gathering intelligence and vice information. Depending on area of operation, surveillance can be conducted without suspect knowledge.
- Emergency medical transport – CMPD helicopters are not designated medical aircraft. They do, however, have provisions capable of carrying patient and medical attendants. They can be used when an event is dangerous to life and air ambulance assets are otherwise unavailable.
- Photography – The helicopter is capable of providing a new perspective and dimension in photographing accident, crime scenes or critical infrastructure that has not been currently mapped through other resources.
- Providing aerial support for critical infrastructure – CMPD helicopters are part of the emergency response plan to respond to critical breaches such as Nuclear energy plants.
- Providing aerial support for local fire departments – to include fire mapping and on scene command observation.
- Providing aerial support for outside agencies – CMPD helicopters can be made available as a regional resource and may be approved for utilization as requested by State Emergency Management.

Impact of Reducing CMPD Helicopter Unit by One Helicopter

If one of the two helicopters was eliminated, impacts include:

- Increased flight hours added to one aircraft impact all local operations - due to federally required maintenance inspections to ensure safe aircraft operations, the single helicopter would be grounded for longer periods of time while inspections/repair services would be completed (CMPD is able to provide continuous operational support with the current two-helicopter structure).

- Increased amount of flight hours on a single airframe would greatly decrease the safe service life of an aircraft – each CMPD helicopter has over 7,000 flight hours on the airframe; with an operational expectation of 1,000 flight hours per year, excessive hours on a single airframe would increase quickly; a single aircraft would also experience more general wear and tear due to excessive use; currently, new aircraft of the same make/model equipped for Police operations would begin in the range of \$5,000,000 dollars.

The following table provides the six year summary of calls, locates, and arrests for CMPD's helicopter unit (two helicopters). Based on a single aircraft operation, calls would potentially decrease by 40%, which would be a reduction of 4,293 events (from 10,733 calls to 6,440).

Year	Call for Service	Assist with Arrest	Direct Arrest	Vehicle Recovery	Locate Persons, Vehicles, Property
2015	725	91	29	9	30
2014	2,057	223	86	14	56
2013	1,638	161	71	11	33
2012	1,908	171	36	4	57
2011	2,130	175	59	8	76
2010	2,275	169	64	8	84
TOTAL	10,733	990	345	54	336

If one helicopter was eliminated from the CMPD Helicopter Unit, the cost savings include:

- Sale of one helicopter = \$1,200,000
- Insurance Savings = \$20,000 for Risk Management
- Fuel Savings due to less flight time = \$37,600 (based on 400 total less hours of flight for the year)
- Total = \$57,600 yearly plus a one-time \$1.2 million for sale of one aircraft

The CMPD Helicopter Unit personnel costs would remain unchanged if one helicopter was eliminated. The current staffing level totals five sworn officers, and must be maintained due to federal regulations governing the amount of personnel required to fly the helicopters.

The long-term costs savings would be reduced by the need to replace the one helicopter more frequently at a cost of approximately \$5.0 million for one helicopter (utilizing two helicopters would require less frequent replacement).

An additional consideration is that Democratic National Convention and the Urban Area Security Initiative (better known as UASI) has purchased equipment for both helicopters. In the event of a helicopter elimination, staff would need to evaluate what would need to be done with that equipment.

43. What additional costs does the City incur for providing officers at Special Events beyond the cost recovered by the agencies requesting the officers? (May 6th Budget Workshop)

CMPD spends approximately \$1.64 million in additional funding to provide special event security with on duty officers for special events located within uptown Charlotte.

The following table lists the special events for which the City provides additional officers.

Month	Large Events Requiring On-Duty Resources	On-Duty Officers Required	Total Cost
January	MLK Parade	95	\$25,848
January	Basketball at TWC Arena	199	67,680
February	CIAA Tournament (3 days)	782	452,129
March	St Patrick's Day (Bar Crawl/Parade/Festival are Off Duty; residual issues handled by On Duty)	18	11,019
March	Basketball at TWC Arena	199	67,680
April	Basketball at TWC Arena	199	67,680
May	Speed Street Festival (4 days - minimal On Duty in the past)	506	275,345
May	Twilight 5K (reserves and On Duty)	50	11,904
May	Bank of America Shareholders Meeting	20	8,162
June/July	Possible MLS Soccer Games at Bank of America (BoFA) Stadium	20	10,883
June/July	4th of July Fireworks	269	146,379
August	Pride Festival (Off Duty for event; Central handles On Duty issues)	30	16,325
August	Panthers Games at BofA Stadium	37	20,134
August	Possible Soccer Games at BofA Stadium	20	10,883
September	Panthers Games at BofA Stadium	37	20,134
October	JCSU Homecoming Parade (Mostly Metro On Duty, a few requests from other divisions)	50	10,203
October	Panthers Games at BofA Stadium	37	20,134
November	Veteran's Day Parade	75	15,305
November	Thanksgiving Parade	130	53,056
November	Marathon (usually Off-Duty; this year was an anomaly)	5	1,701
November	Basketball at TWC Arena	199	67,680
December	Panthers Games at BofA Stadium	37	20,134
December	Basketball at TWC Arena	199	67,680
December	New Year's Eve	207	112,641
December	ACC Championship Festival & Game (had to pull On Duty for traffic in 2014)	60	28,568
December	Belk Bowl Festival & Game (had to pull On Duty for traffic in 2014)	60	34,690
	Total		\$1,643,977

Transportation

44. What are the Powell Bill revenue and Street Resurfacing cost considerations related to the anticipated FY2016 budget gap? (March 17th Budget Workshop)

Powell Bill Revenue

The State Gas Tax is the primary source of street resurfacing and maintenance funding for the City, representing approximately 80% of the total revenues supporting the Powell Bill Fund. In FY2015, the City received \$20,251,155 in actual receipts from the gas tax. This is an increase of \$477,483 (2.4%) over the FY2014 actual receipts. The actual FY2015 Gas Tax receipts were also \$437,149 above the amount budgeted for FY2015.

The second largest source of revenue for the Powell Bill Fund is a transfer from the General Fund to support additional street resurfacing. Beginning in FY2007, and in each year since, the City has transferred \$4,261,000 from the General Fund to the Powell Bill Fund in a collaborative effort to maintain citywide pavement conditions. In FY2015 the \$4,261,000 General Fund transfer represents 17.2% of the total revenue in the Powell Bill Fund. Other annual Powell Bill revenues include Street Degradation Fees (\$650,000) and Interest Income (\$80,000).

The City maintains a minimum fund balance reserve policy for the Powell Bill Fund of \$1.0 million. As of June 30, 2014, the Powell Bill Fund has a fund balance amount of \$2.1 million. Up to \$1.1 million of this fund balance is being considered for appropriation in FY2016. Additionally, the \$437,149 in unbudgeted gas tax revenue received during FY2015 will be added to fund balance for potential use in FY2017 and future fiscal years.

Street Resurfacing Cost

The FY2016 budget request for the Powell Bill Fund includes \$12,041,870 specifically for contracted street resurfacing. If approved, this budgeted amount would represent a \$1.6 million (15.5%) increase over the current contracted resurfacing budget in FY2015. This increase is made possible by a projected 3.9% increase in Gas Tax revenue over FY2015, and a \$1.1 million allocation from Powell Bill Fund Balance in FY2016.

Based on current bid and asphalt prices it is estimated that the proposed FY2016 budget for contracted resurfacing would pave 231 lane miles resulting in a 23 year resurfacing cycle. Charlotte Department of Transportation's goal is to achieve a pavement condition rating of 90, which is comparable to a 12-14 year resurfacing cycle. To achieve the pavement condition rating goal, the City would need to pave at least 370 lane miles annually, at an estimated cost of \$19.2 million per year, to reduce the resurfacing cycle to 14 years. Reaching this goal would require both a continuation of the \$4.3 million General Fund transfer and \$7.2 million in additional annual revenue.

If the \$4,261,000 General Fund transfer to the Powell Bill Fund was reallocated to the General Fund to help resolve the anticipated FY2016 budget gap, the number of lane miles that could be paved during FY2016 would be reduced to 150, increasing the resurfacing cycle to 35 years, more than double the 14 year cycle target.

The Table below provides a summary of the impact on street resurfacing without the General Fund Contribution.

Contracted Street Resurfacing	(in Millions) Funding	Lane Miles Resurfaced	Resurfacing Cycle
CDOT Goal (Pavement Condition Rating of 90)	\$ 19.2	370	14 Years
Proposed FY2016 Budget (with General Fund Contribution)	\$ 12.0	231	23 Years
Eliminate General Fund Contribution	\$ 7.8	150	35 Years

Aviation

45. What is the five-year projection for the Operation & Maintenance Expenses per Enplaned Passenger and the Cost per Enplanement? (April 17th Budget Workshop)

While there is a relationship between Operation & Maintenance (O&M) Expenses per Enplaned Passenger and airline Cost per Enplanement (CPE), the relationship is not directly proportional. The key drivers for both the O&M and CPE projections include anticipated growth in the airport's capital program. However, CPE also considers the operating revenue levels, which contribute to airline profit sharing. Moreover, CPE projections assume agreement of terms and conditions contained in the proposed Airport Use Agreement currently being negotiated with airlines serving the airport.

	Projected FY2016	Projected FY2017	Projected FY2018	Projected FY2019	Projected FY2020
O&M per Enplanement	\$6.43	\$6.80	\$7.20	\$7.41	\$7.63
Cost per Enplanement	\$1.56	\$1.92	\$1.92	\$2.13	\$2.18

Solid Waste Services

46. What is the history of the separate disposal fee and is it calculated to recover the amount charged by the County for landfill usage? (April 17th Budget Workshop)

In 1984, the City and Mecklenburg County entered into a solid waste interlocal agreement where the City became the lead agency charged with solid waste collections and Mecklenburg County took over disposal. This agreement included the transfer of City landfills to County ownership. Also as part of the original agreement, the County did not charge the City for tipping fees and instead charged a residential disposal fee, billed at the same time as the property tax, to cover the cost of the landfills. In 1996, the original terms of the agreement ended. At that time, the County eliminated single-family and multi-family residential disposal fees and the City began to incur tipping fees. The City adopted the same fee used by the County - \$38 per year for single family and \$23 per year for multi-family. The County retained a \$10 per year administrative fee for residential customers. The County fee is currently \$15 per year. City code does not prescribe that the residential solid waste disposal fee be directly tied to the actual disposal costs.

Changes to Solid Waste Disposal Fee

Fiscal Year	Single Family	Multi Family
FY1997	\$38 per year	\$23 per year
FY2001	\$44 per year	\$27 per year
FY2013	\$47 per year	\$24 per year*

*decrease due to elimination of multi-family supplemental service

47. What would be the impact of converting the disposal fee to a property tax for property owners? (April 17th Budget Workshop)

Most single family residential homeowners would see a decrease in annual cost if the \$47 per year fee was converted and contract escalation and equipment maintenance costs are added with a 1.35 cent increase on the property tax rate. The following table shows various scenarios by percentile.

\$97,600 Home Value (25th Percentile)	FY2015	Convert Solid Waste Fee	Change
Property taxes	457.45	470.63	13.18
Solid Waste fee (Residential)	47.00		(47.00)
Total Annual	504.45	470.63	(33.82)
Total Monthly	42.04	33.82	(2.82)
\$141,100 Home Value (50th Percentile)	FY2015	Convert Solid Waste Fee	Change
Property taxes	661.34	680.38	19.05
Solid Waste fee (Residential)	47.00		(47.00)
Total Annual	708.34	680.38	(27.95)
Total Monthly	59.03	56.70	(2.33)
\$232,500 Home Value (75th Percentile)	FY2015	Convert Solid Waste Fee	Change
Property taxes	\$1,089.73	\$1,121.12	\$31.39
Solid Waste fee (Residential)	47.00		(47.00)
Total Annual	1,136.73	1,212.12	(15.61)
Total Monthly	\$94.73	\$94.43	\$(1.30)
\$385,200 Home Value (90th Percentile)	FY2015	Convert Solid Waste Fee	Change
Property taxes	1,805.43	1,857.43	\$47.25
Solid Waste fee (Residential)	47.00		(47.00)
Total Annual	1,852.43	1,857.43	5.00
Total Monthly	154.37	154.79	0.42

48. When was the tipping fee first adopted and what was the rationale for the fee at the time? (May 6th Budget Workshop)

In 1984, the City and Mecklenburg County entered into a solid waste interlocal agreement where the City became the lead agency charged with solid waste collections and Mecklenburg County took over disposal. This agreement included the transfer of City landfills to County ownership. Also as part of the original agreement, the County did not charge the

City for tipping fees and instead charged a residential disposal fee, billed at the same time as the property tax, to cover the cost of the landfills. In 1996, the original terms of the agreement ended. At that time, the County eliminated single-family and multi-family residential disposal fees and the City began to incur tipping fees. The City adopted the same fee used by the County - \$38 per year for single family and \$23 per year for multi-family. The County retained a \$10 per year administrative fee for residential customers. The County fee is currently \$15 per year. City code does not prescribe that the residential solid waste disposal fee be directly tied to the actual disposal costs. The \$47 fee covers disposal costs as well as transportation costs to the landfill.

Changes to Solid Waste Disposal Fee

Fiscal Year	Single Family	Multi Family
FY1997	\$38 per year	\$23 per year
FY2001	\$44 per year	\$27 per year
FY2013	\$47 per year	\$24 per year*

*decrease due to elimination of multi-family supplemental service

49. Is there a policy that guides how we provide multi-family solid waste collection? Is multi-family treated like a commercial or a residential property? (May 6th Budget Workshop)

City code guides the provision of multi-family solid waste services. A multi-family unit is defined as any apartment, group of apartments, or condominiums used for dwelling places of more than four families.

According to City Code, rollout container service is available to any multi-family complex that has 30 or fewer units. Dumpster/compactor service is available to multi-family units and is provided through the City's multi-family contract.

50. Please provide a summary of multi-family program status including to whom services are provided, on what basis, and how it varies from single family service. (May 6th Budget Workshop)

Multi-family complexes in the City receive service through the dumpster/compactor contract, rollout service provided by Solid Waste Service staff, or through the private market. The table below summarizes the services offered for multi-family complexes.

Services/Other Information	Dumpster/Compactor (contracted service)	Rollout Service (non-contract)	No City Service (private hauler)
# of Units/Customers	117,891	21,975	13,686
# of Complexes	791	564	N/A
Annual Solid Waste Fee Charged	\$24	\$24	\$24
Garbage	Service Provided	Service Provided	N/A
Recycling	Service Provided	Service Provided	N/A
Yard Waste	Service Provided	Service Provided	N/A
Bulky Item	Service Provided	Service Provided	N/A

51. Please provide a scenario of a fee-based solid waste system, including the incremental increase this year and the overall service provision. (May 6th Budget Workshop)

The table below summarizes the annual fees that the City would charge to fully recover the costs of the Solid Waste Services programs.

Customer Type	Current Fee	Full Fee	Incremental Difference
Single Family Curbside	\$47	\$186	\$139
Multi-Family Dumpster/Compactor	\$24	\$55	\$31
Multi-Family Rollout	\$24	\$186	\$162
Small Business*	\$0	\$250	\$250

*Must generate less than 512 gallons per week.

52. If the single family residential solid waste fee was set at \$65 per year to cover the cost of contract escalations, what percentage of homeowners would see an overall reduction in costs if the fee was converted into 1.35 cents per \$100 in valuation in property tax? (May 6th Budget Workshop)

If the single family residential fee were set at \$65 (current \$47 fee including the additional \$18 increased contract costs), the new breakeven point in home value would be \$369,300. In this scenario, approximately 88% of residential property owners would pay less with the fee conversion.

53. How much solid waste revenue do we shift from residential property to commercial property from the fee conversion? (May 6th Budget Workshop)

The fee conversion adds an additional \$3.1 million in commercial property tax revenue.

54. If the solid waste fee is being subsidized by the general fund, what is the actual cost of providing that service? (May 6th Budget Workshop)

The total cost to provide Solid Waste Services is \$52.4 million for FY2016. Current fees generate an estimated \$12.5 million, with \$39.9 million subsidized by the General Fund. More detail is provided in the following chart.

Program/Service	Total Annual Cost
Single Family Curbside	\$35,011,506
Mobile Homes	\$396,537
Multi-Family Dumpster/Compactor	\$6,443,830
Multi-Family Rollout	\$4,084,979
Small Business*	\$593,256
Special Services**	\$5,900,885
Total	\$52,430,993

*Must generate less than 512 gallons per week.

**Special collections and maintenance to include street sweeping, litter picking, events cleanup/support, barricade delivery, statue and monument cleaning, infrastructure/cleanliness of Central Business District, and dead animal and public receptacles collection

55. What would be the annual solid waste fee if it was calculated to recover only direct disposal costs? (May 6th Budget Workshop)

The direct disposal cost refers to only the tonnage paid at disposal sites. The direct cost does not account for fuel for the various garbage routes to travel to the landfill, collection costs, or any administrative/processing expenses. The table below provides the “direct cost only” fee:

Customer Type	Direct Disposal Fee
Single Family Curbside	\$29
Multi-Family Dumpster/Compactor	\$16
Multi-Family Rollout	\$29
Small Business*	\$53

*Must generate less than 512 gallons per week.

56. Are there individuals who live on private streets who do not receive City solid garbage collection and pay the solid waste fee? (May 6th Budget Workshop)

Some neighborhoods, such as gated communities, opt out of the City’s solid waste services, but still pay the fee. City services remain available to these neighborhoods. Other neighborhoods with private streets opt to receive the service. The status of a street being designated as private is not a factor in determining whether to provide Solid Waste Services’ residential services.

57. Please provide a summary of the costs, revenues, and number of units associated with the various Solid Waste Services categories. (May 6th Budget Workshop)

The following table provides a summary of costs, revenues, and number of units associated with the various Solid Waste Services categories:

FY2016 Services/Other Information	Single- Family	Multi-Family		Business **	Other Special Services***
		Dumpster/ Compactor Contract*	Curbside Rollout	Small Businesses	
# of Units/Customers	190,476	117,891	21,975	2,376	
# of Complexes	N/A	791	564	N/A	
Annual Solid Waste Fee Charged	\$47	\$24	\$24	\$0	
Revenue from Fee	\$8,852,121	\$2,829,384	\$527,400	\$0	
Cost:					
Refuse	\$15,497,799	\$4,221,473	\$1,787,963	\$525,668	
Recycling	6,409,330	767,118	739,437	\$0	
Yard Waste	7,494,570	6,325	864,640		
Bulky Item	1,972,368	714,790	227,550		
Total Direct Cost****	31,374,067	5,709,706	3,619,590	525,668	
Administrative Overhead*****	4,034,074	734,124	465,388	67,588	
Total Annual Cost	\$35,408,043	\$6,443,830	\$4,084,979	\$593,256	\$5,900,885
Total Cost per Unit/Customer	\$186	\$55	\$186	\$250	
Incremental Fee Increase	\$139	\$31	\$162	\$250	
Current Cost Recovery % per Unit/Customer	25%	44%	13%	0%	

*Includes cost to service 131 public facilities

**Must be small waste generator of less than 512 gallons per week

***Special collections and maintenance to include street sweeping, litter picking, events cleanup/support, barricade delivery, statue and monument cleaning, manage infrastructure/cleanliness of Central Business District, and dead animal and public receptacles collection

****Direct Cost includes contract monitoring, customer service, divisional support and supervision and incremental rollout cart purchases and cart maintenance

*****Administrative Overhead includes departmental overhead (Director's Office, Administration, Human Resources, Technology, Public Service, Facilities)

58. Related to the Solid Waste Services section of the City Code (referenced in Q&A #18 distributed on May 12th), does Council have the authority to change this City Code? When were the Solid Waste sections adopted? And are these sections of the City Code driven by State mandates? (May 6th Budget Workshop)

City Council is the governing body that changes City Code. The Ordinance was originally adopted in 1985, with two revisions:

- The last change to the Solid Waste section of the Ordinance was in 2013, to prohibit rollout containers from blocking sidewalks.

- Previous to that, the Ordinance was changed in 2004 to close a loophole created by the Zoning Ordinance that allowed a multi-family development of more than 30 units to receive rollout service instead of dumpster/compactor.

The provision of Solid Waste service sections of the City Code is not driven by State mandates.

59. How many small businesses receive Solid Waste services? (May 6th Budget Workshop)

Solid Waste Services collects small business garbage from 2,376 small waste generators, or those small businesses that generate less than 512 gallons per week. There is no fee charged for this service. All other commercial properties use private haulers.

60. Is it correct that Solid Waste Services was entirely funded by the General Fund until the landfill agreement was approved to implement the fee for disposal? (May 6th Budget Workshop)

Yes, that is correct.

Charlotte Water

61. For Charlotte Water's Service Level Change requests listed on Slide #7 of the February 25th Budget Workshop presentation, please provide additional information on what is driving these requests. (February 25th Budget Workshop)

The preliminary Service Level Change requests shared at the February 25th Budget Workshop are driven by changes in regulations governing Charlotte Water and by increases in workload related to improvements in the region's economy.

Regulatory Drivers

Of the \$2.7 million in preliminary service level change requests, \$2.1 million are associated with the changing regulatory environment. The State of North Carolina has increased requirements for performing underground utility locations. In order to comply with these new requirements, an additional \$1.3 million is needed. Additionally, Federal Clean Water Act requirements and state laws concerning public records and procurement are also cost drivers. Environmental Permit and other violations are a potential outcome of not meeting regulatory requirements. Penalties for these types of violations range from civil penalties to moratoriums on new water/sewer service connections to potential criminal charges.

Economic Drivers

Economic growth and customer service needs constitute the remaining \$600,000 in requests. Increased construction of new subdivisions and commercial development has driven the need for more plans review staff. As part of this budget cycle, Charlotte Water is planning to propose new user fees to cover those expenses.

Budget Process

These Service Level Change requests remain under review by the City Manager, who will present his FY2016 & FY2017 budget recommendations on May 4th.

62. Related to the pie chart on Slide #5 titled "FY2016 Budget By Program," of the \$225,930,768 capital allocation, how much is comprised of new construction and how much is maintenance? (February 25th Budget Workshop)

The \$225.9 million is divided into two categories. The first category represents the FY2016 appropriations necessary to cover Charlotte Water's yearly principal and interest payments on outstanding debt. The second category provides the Pay-As-You Go (PAYGO) dollars necessary to support current and future capital programs. The PAYGO category includes both new construction and maintenance related projects. Both categories are consistent with the long-term financial planning model. The table below provides an additional detail on the components within the \$225.9 million.

Category	Request	Percent
Principle and Interest Payments	\$151,354,379	67%
PAYGO (New Construction)	\$19,369,400	9%
PAYGO (Maintenance)	\$55,206,989	24%
Total	\$225,930,768	100%

Proceeds from new debt programmed in Charlotte Water's FY2016 Community Investment Plan are not included in the \$225.9 million.

63. For rate increase Scenario 4 on Slide #15, what would be the impact to revenue if Tier 2 was frozen? (February 25th Budget Workshop)

Charlotte Water developed Scenario 5 based on the following three assumptions:

1. Elimination of Tier 1 Subsidy
2. Increase Debt Service Recovery to 25%
3. No Change to Tier 2, 3 and 4 Water Rates

Freezing Tier, 2 under Scenario 5, results in an estimated \$3,653,044 in additional revenue, compared to not freezing Tier 2 rates. Using this methodology, a 7 Ccf customer would see a 7.1% rate increase over FY2015. The table below demonstrates the difference between Scenario 4, which only freezes Tiers 3 and 4, and Scenario 5, which freezes Tiers 2, 3, and 4. Assumptions 1 and 2 are the same for both Scenario 4 and Scenario 5.

Tiers	Consumption	Scenario # 4		Scenario # 5	
		Rate	Revenues	Rate	Revenues
1	16,241,349	1.62	\$26,280,766	1.62	\$26,280,766
2	6,374,175	2.09	13,302,261	2.66	16,955,304
3	4,024,873	4.71	18,957,152	4.71	18,957,154
4	2,407,283	8.91	21,448,892	8.91	21,448,891
Total	29,047,680		\$79,989,071		\$83,642,114
Difference between Scenario 4 and Scenario 5					\$3,653,044

In Scenario 4, Tier 2 rates are lower because the increased revenue from freezing Tier 3 and Tier 4 is spread evenly over Tier 1 and Tier 2.

64. What is the rationale of each of the rate scenarios? (February 25th Budget Workshop):

Following feedback from Council's Budget Committee, Charlotte Water has explored several options for changing the water and sewer rate methodology for FY2016. These options are designed to align the cost of service with each rate tier and to also decrease reliance on volumetric revenue by increasing the fixed portion of customer bills. Increasing the fixed component of the revenue stream will decrease revenue disruption caused by weather, changing economic conditions, or other uncontrollable factors.

The following table addresses the rationale for each potential rate methodology scenario, according to three key factors:

- Aligning rate charges with actual cost of service
- Improving revenue predictability and stability
- Linking customer growth and revenue growth

Scenario	Align rate charged with cost of service	Improve Revenue Predictability & Stability	Linking Customer and Revenue Growth	FY2016 Bill Impact for 7 Ccf Customer**
Current Methodology				\$2.18
Scenario 1: Eliminate Tier 1 Subsidy	√	√	√	\$2.25
Scenario 2: Increase Availability Fee		√	√	\$2.58
Scenario 3: Eliminate Tier 1 Subsidy & Increase Availability Fee	√	√	√	\$2.64
Scenario 4: Eliminate Tier 1 Subsidy, Increase Availability Fee, Freeze Tier 3, & 4 Rates	√	√	√	\$2.32
Scenario 5: Eliminate Tier 1 Subsidy, Increase Availability Fee, Freeze Tier 2, 3, & 4 Rates		√	√	\$4.04

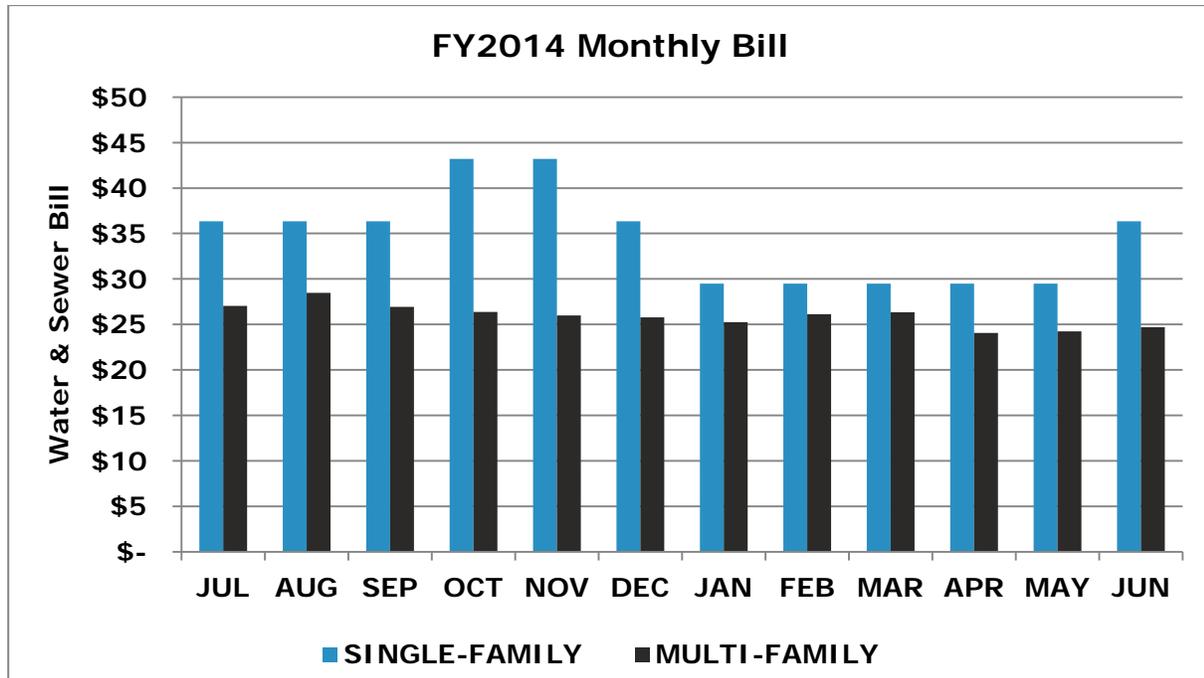
** These potential rate impacts are based upon preliminary estimates and are for illustrative purposes.

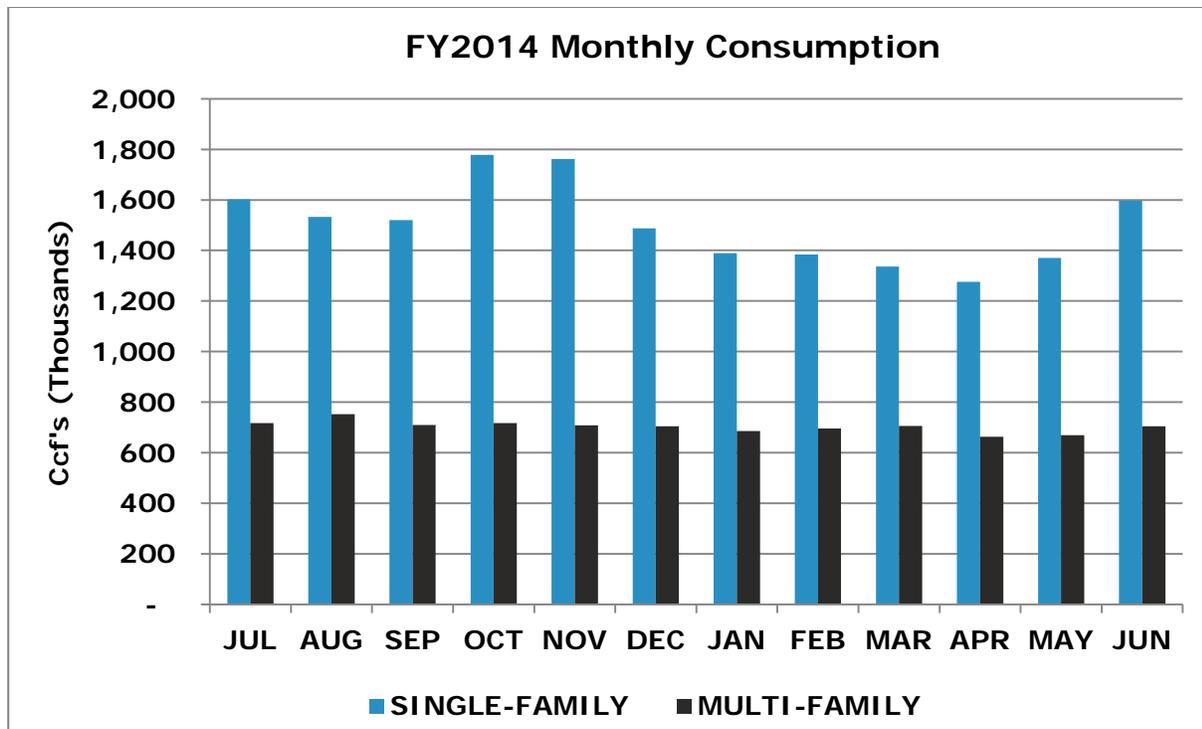
Please note that Scenario's 1 through 4 each generate the same amount of revenue for FY2016.

65. How does single-family water and sewer usage differ from that of multi-family usage? (February 25th Budget Workshop):

The monthly per unit bill for a single-family residence averages \$8.71 more than the monthly bill for an individual multi-family unit. Monthly consumption for a single-family residence is 1.9 Ccf (1,421 gallons) more than the consumption for an individual multi-family unit.

The FY2014 monthly bill and consumption rates are provided in the following charts:



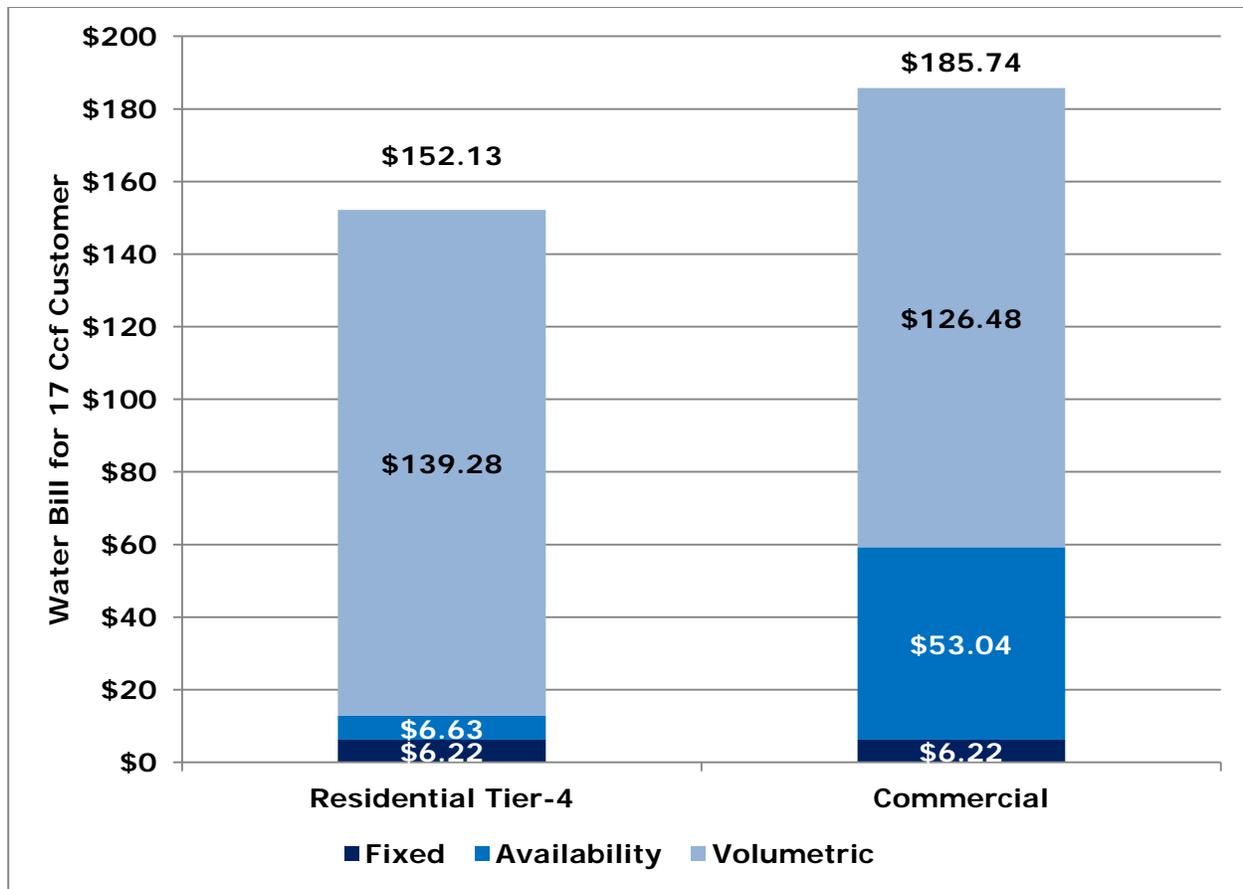


66. What is the commercial rate? How does it compare to the Tier 4 residential rate? (February 25th Budget Workshop):

Charlotte Water develops monthly charges through a cost of service model, which distributes operating and capital costs to customer classes based on demand and usage characteristics. In addition to volumetric charges, commercial and residential customers pay monthly availability fees based on meter size. Residential customers typically pay \$6.63 per month in availability fees. Commercial (Non-Residential) customers pay monthly availability fees ranging from \$16.58 for a 1" service to \$1,127.04 for a 12" service.

Charlotte Water's preliminary FY2016 Tier 4 combined water and sewer rate is \$10.20 per Ccf. The preliminary FY2016 Commercial combined water and sewer rate is \$7.44 per Ccf. Taking the availability fee into account, a commercial customer with a 2-inch meter would pay \$185.74 per month for 17 Ccfs while a residential customer with a ¾ inch meter would pay \$152.13. Only about 4% of the total number of water/sewer bills issued in a year has any Tier 4 consumption.

The chart below provides a comparison of the Commercial and Tier 4 residential rates based on 17 Ccfs of consumption.



67. Please list examples of capital projects currently funded, with anticipated future funding, and without current funding? (February 25th Budget Workshop)

Charlotte Water anticipates budgeting approximately \$14 million as part of the FY2016 Community Investment Plan to continue work on the following six currently funded projects.

1. Clems Branch Pump Station Improvements (\$3M)
2. Coffey and Taggart Creek Outfall (\$1M)
3. McDowell Basin Trunk Sewers (\$3M)
4. Steele Creek LS Replacement (\$4M)
5. Vest FM & Pump Station to Franklin (\$2.03M)
6. WM – Tyvola Road West (\$1M)

These six projects represent \$72 million in prior year appropriations. Within the total five-year Community Investment Plan, Charlotte Water anticipates the need for approximately \$233 million in new debt service proceeds over 51 currently funded projects.

[Attachment #4](#) is a table that provides a detailed list of the 51 Community Investment Plan Projects mentioned above.

Storm Water Services

68. Is there an opportunity to use a “sinking fund” approach for Storm Water capital projects? (February 25th Budget Workshop)

A sinking fund is established by setting aside revenue over a period of time to fund a future capital expense. The funds can be used to replace capital equipment as it becomes obsolete or to fund a major fixed asset expenditure. The payments are amortized to that future expenditure.

Storm Water Services has both a backlog of previously identified projects as well as the addition of new projects being added to the work list each year. Neither the backlog nor the new projects added annually are fully funded within the current fee structure.

To establish and use a “sinking fund” approach to fund Storm Water capital needs, staff projects the following two-part funding scenario would be necessary:

1. Set the fee structure so all new projects added annually are fully funded by the revenue and debt capacity generated by those fees, which can be accomplished by:
 - o Initiating a four tier rate structure for single family detached parcels
 - o Increasing Storm Water fees by 5.9% annually starting in FY2017
2. Then, using the sinking fund concept, add a onetime fee increase in addition to the 5.9% above to be dedicated to eliminating the current backlog of projects.

The following table provides examples of the potential revenue and debt capacity that could be generated by a onetime fee increase to support a sinking fund. All capacity numbers shown are for the FY2016-FY2028 timeframe.

One Time Fee Increase FY2017 Only on 4 rates	Revenue Generated	Debt Generated	Total Sinking Fund Capacity Generated
1.0%	\$7.47	\$10M	\$17.31M
3.5%	\$26.13	\$20M	\$38.22M
7.0%	\$52.26	\$40M	\$73.61M

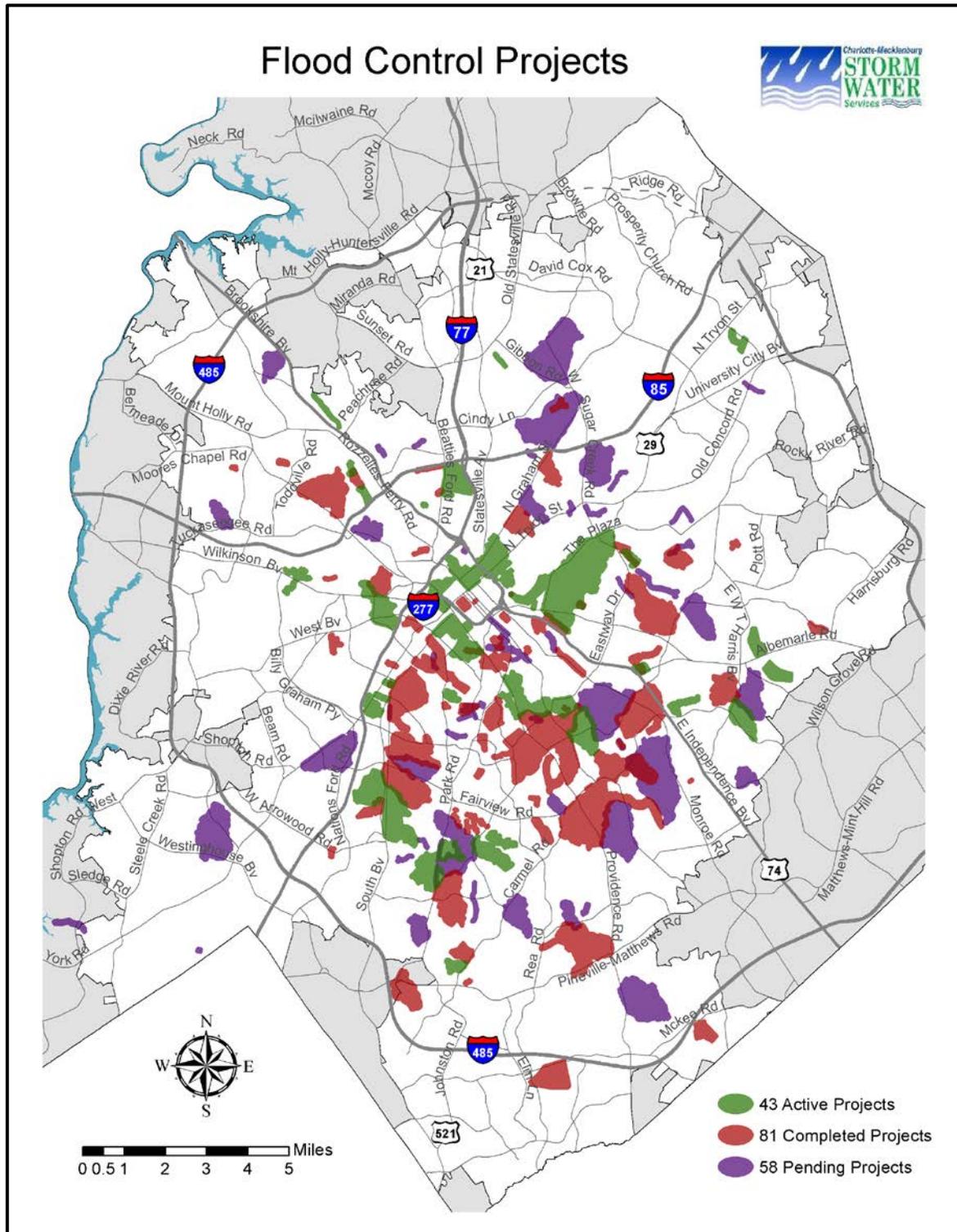
Note: Total capacity will be less than total revenue plus debt because of debt payments.

69. Please provide examples of where major Flood Control projects are currently located. (February 25th Budget Workshop)

The following table lists the 43 active flood control projects throughout the City.

Location of Active Flood Control Projects	
6th and Graham	Louise
Alanhurst/Cherrycrest	Lyon Phase 1
Beckwith/Meadow	Lyon Phase 2
Blenhein	Margaret Turner
Brentwood Phase 1	Mary Alexander
Brentwood Phase 2	McAlway/Churchill
Cedars East	Meadowridge
Celia	Myrtle Ave/Morehead Phase 1
Chandworth	Myrtle Ave/Morehead Phase 2
Chatham	Parkwood Phase 1
Cherokee/Scotland	Parkwood Phase 2
Cutchin	Peterson
Edgewater/Rosecrest Phase 1	Princeton/Somerset
Edgewater/Rosecrest Phase 2	Robinhood/Dooley
Gaynor	Shamrock Gardens
Greenhaven/Pierson	Tattersall
Hampton	Wanamassa
Hill	Water Oak
Hinsdale/Tinkerbell	Wilkinson Blvd
Kenilworth/Romany	Wiseman
Lilly Mill	Yancey
Lincoln Heights	

The following map provides the geographic location of these active projects, as well as completed and pending flood control projects.



70. Please provide scenarios where there are varying Storm Water fee changes in alternating years (as have been presented to Council in prior years). (February 25th Budget Workshop)

The scenarios below were provided to City Council on May 28, 2014 as part of the FY2015 Straw Votes discussion. These scenarios were produced with the assumption that all of the increased revenue and additional staff would support the completion of the Maintenance & Repair Project Backlog.

Scenario A – Continue historical Fee Model - 1/2% Step down each year to a floor of 2.5% annually

If the Fee Model employed prior to FY2015 were continued through FY2020 when the annual fee increase was projected to stabilize at 2.5% annually, the wait time by FY2020 would be reduced to 2 - 3 years

Impact	FY15	FY16	FY17	FY18	FY19	FY20
Fee Increase	5.0%	4.5%	4.0%	3.5%	3.0%	2.5%
Monthly Cost of Increase	\$0.40	\$0.37	\$0.35	\$0.31	\$0.28	\$0.24
Maintenance & Repair Backlog	948	857	746	641	550	459
Additional Staff	6	13	0	0	0	0

Scenario B – No fee increase in FY2015

Under Scenario B, the wait time by FY2020 would increase to 6 - 7 years

Impact	FY15	FY16	FY17	FY18	FY19	FY20
Fee Increase	0.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Monthly Cost of Increase	\$0.00	\$0.24	\$0.25	\$0.25	\$0.26	\$0.26
Maintenance & Repair Backlog	958	985	1,014	1,043	1,072	1,101
Additional Staff	0	0	0	0	0	0

Scenario C – Annual 3% Fee Increase

Under Scenario C, the wait time by FY2020 would be reduced to 3.5 - 4.5 years

Impact	FY15	FY16	FY17	FY18	FY19	FY20
Fee Increase	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Monthly Cost of Increase	\$0.24	\$0.25	\$0.25	\$0.26	\$0.26	\$0.28
Maintenance & Repair Backlog	948	934	912	889	867	844
Additional Staff	5	2	0	0	0	0

Scenario D – One-time fee increase to reduce the backlog to 1 year – Cash Only

Under Scenario D, the wait time by FY2020 would be reduced to approximately 1 year.

Work on the backlog will be paid with **Pay-As-You-Go cash only.**

Next fee increase would be needed in FY2021.

Impact	FY15	FY16	FY17	FY18	FY19	FY20
Fee Increase	37.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Monthly Cost of Increase	\$2.93	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Maintenance & Repair Backlog	852	724	567	411	262	194
Additional Staff	23	0	0	0	0	0

Scenario E – One-time fee increase to reduce the backlog to 1 year – Cash and Debt

Under Scenario E, the wait time by FY2020 would be reduced to approximately 1 year. Work on the backlog will be paid with **Pay-As-You-Go cash and Revenue Bonds.** Next fee increase would be needed in FY2021.

Impact	FY15	FY16	FY17	FY18	FY19	FY20
Fee Increase	19.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Monthly Cost of Increase	\$1.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Maintenance & Repair Backlog	852	724	567	411	262	194
Additional Staff	23	0	0	0	0	0

71. Has the City considered purchasing property in high flood prone areas, rather than paying the higher cost of remediating private property? (February 25th Budget Workshop)

Yes, the City has previously purchased property in high flood prone areas. As part of capital investment planning, multiple alternatives are identified to solve problems and to ensure cost beneficial improvements. The feasibility of purchasing properties in flood prone areas is evaluated on a case by case basis and may be pursued if the benefits outweigh the improvement costs. In considering whether to purchase properties in flood prone areas, staff also evaluates various intangible impacts, including:

- Loss of affordable housing
- Reduction of the tax base
- Creation of vacant property in neighborhoods
- Future maintenance costs.

Some examples where the City has purchased property in high flood prone areas include:

- **Celia Avenue Storm Drainage Improvement Project** - to reduce flooding of streets and structures. Celia Avenue connects to Beatties Ford Road just north of the Brookshire Freeway. Celia Avenue frequently floods and provides the only vehicular access (dead end road) for 12 properties. Several alternatives were considered. The selected alternative included purchase of two parcels, home demolition, culvert replacement, and realigning and raising of the roadway. At a cost of \$725,000, this selected alternative resulted in a \$460,000 cost savings compared to the next lowest cost alternative. The properties were closed on May 31, 2013 and November 11, 2013.
- **Brentwood Storm Drainage Improvement Project** – to reduce flooding of streets and structures, and repair stream bank erosion. The project is bordered by Remount Road to the south and west and Barringer Drive to the east. Several planning phase alternatives were evaluated. One portion of the project experienced frequent flooding of Barringer Drive and a house, 2438 Barringer Drive. The selected alternative for this area included purchase and demolition of 2438 Barringer Drive and culvert replacement to eliminate the house flooding and meet design standards for Barringer Drive. At a cost of \$1,830,000, this selected alternative resulted in \$259,000 cost savings compared to the next lowest cost alternative. The property was closed on November 1, 2012.

Enabling legislation to allow purchase of flood prone property

In 2014, the General Assembly enacted legislation authorizing counties with populations of at least 910,000 to engage in a greater range of flood control solutions on private property that would lead to more cost effective solutions. SL 2014-14 authorizes certain types of flood control solutions as permissible measures for public enterprises operated by counties using storm water

fees. The legislation expressly authorizes those counties to purchase property for the purpose of demolishing flood-prone buildings and to implement flood damage reduction techniques that result in improvements to private property including elevating structures, demolishing flood-prone structures, and retrofitting flood-prone structures. The legislation states that these private property improvements are only performed as long as certain conditions are met, such as obtaining consent of the property owners and conducting feasibility studies before proceeding.

The Storm Water Services program has operated as a public enterprise using storm water fees under the authority of the North Carolina General Statutes (NCGS) 160A-311 since 1993. While NCGS 160A-311 does not expressly authorize the same types of flood control solutions that were authorized by SL 2014-14, the City interpreted the language very broadly and engaged in these flood control solutions. Since the City of Charlotte operates its storm water management program in coordination with a county that meets the population threshold of SL 2014-14, the City is seeking similar enabling legislation in order to be specifically authorized to continue implementation of flood damage reduction techniques on private property using storm water fees.

72. What would be the impacts of not increasing the Storm Water fee, or increasing it at a small amount (such as 2%)? (February 25th Budget Workshop)

The table below shows the impact on Storm Water revenues, capital expenditures, and the ability to pursue capital projects if Storm Water fees were not increased, or increased 2%, under both the current two rate structure and a potential four rate structure.

FY2016-FY2028	2 rates	2 rates	4 rates
Rate Increase	0%	2% in FY16 only	0%
Revenue	746,226,175	761,150,699	846,932,850
Bond Proceeds	180,000,000	180,000,000	240,000,000
Capital Expenditures	623,580,573	634,029,604	770,351,569
Additional Capacity	(79,521,044)	(69,072,013)	67,249,952
Flood Control	Average starting 2 projects/year	Average starting 2.2 projects/year	Average starting 3 projects/year
Maintenance and Repair	9 year wait & growing	9 year wait & growing	7-8 year wait
C Low Priority Projects	No projects started	No projects started	No projects started

73. Please explain contributions from the General Fund for Storm Water Services. (February 25th Budget Workshop)

The City has provided General Fund contributions to Storm Water Services associated with the impact on storm water systems from impervious surfaces of City-maintained streets and City-owned general government facilities since 1993. Beginning in 1995, the City also began making Storm Water contributions from the Powell Bill Fund.

While the City does make a contribution to Storm Water Services for City-maintained streets through the Powell Bill Fund, the State does not make a similar contribution for State-maintained roads. Charlotte City Code Sec. 18-40 – Exemptions and Credits Applicable to Service Charges states:

*The following exemptions from storm water service charges shall be allowed:
Public road rights-of-way which have been conveyed to and accepted for maintenance
by the State and are available for use in common by the general public for motor
vehicle transportation.*

Below is a summary of the changes to the City contributions that have occurred since 1994.

- In FY1994, Council approved a \$2.5 million annual contribution to Storm Water Services for City maintained streets and general government facilities and also dedicated one cent of the property tax rate to Storm Water Services.
- In FY1995, the \$2.5 million annual contribution was split between General Fund and Powell Bill (\$2.0 million and \$500,000 respectively).
- Beginning in FY1997, the contributions were increased each year based on the annual percentage increase of the Storm Water Fee.
- In FY1998, the City began phasing out dedicated property tax revenues at a rate of 25% annually through FY2001.
- In FY2006, City Council approved a cap on the General Fund and Powell Bill Fund contributions at \$5.68 million (\$4.54 million General Fund, \$1.14 Powell Bill Fund).
- In FY2011 City Council approved a 10% reduction of the total contribution, to be reinstated at the rate of 33% annually beginning in FY2012 through FY2014.
- The current FY2015 contribution is \$4.54 million from the General Fund and \$1.14 million from the Powell Bill Fund, for a total City contribution of \$5.68 million.

The following table shows the annual and total contributions from the City's General Fund and Power Bill Fund to Storm Water Services between 1993 and 2015.

General Fund and Powell Bill Contributions to City Storm Water Services					
Fiscal Year	Fee Increases	General Fund Contribution	Powell Bill Fund Contribution	Dedicated Property Tax	Total Payment
1993	0%	1,250,000	0	0	1,250,000
1994	0%	2,500,000	0	2,626,313	5,126,313
1995	0%	2,000,000	500,000	2,815,352	5,315,352
1996	0%	2,000,000	500,000	2,901,430	5,401,430
1997	10.0%	2,200,000	550,000	3,053,738	5,803,738
1998	10.0%	2,420,000	605,000	2,608,377	5,633,377
1999	10.0%	2,662,500	665,000	1,895,595	5,223,095
2000	10.0%	2,928,250	732,200	1,003,089	4,663,539
2001	10.0%	3,221,275	805,000	0	4,026,275
2002	7.5%	3,466,092	867,172	0	4,333,264
2003	5.5%	3,653,949	915,460	0	4,569,409
2004	7.5%	3,927,699	984,120	0	4,911,819
2005	7.5%	4,222,276	1,057,929	0	5,280,205
2006	7.5%	4,539,290	1,137,273	0	5,676,563
2007	7.0%	4,539,290	1,137,273	0	5,676,563
2008	7.0%	4,539,290	1,137,273	0	5,676,563
2009	7.0%	4,539,290	1,137,273	0	5,676,563
2010	5.0%	4,539,290	1,137,273	0	5,676,563
2011	7.0%	4,085,361	1,137,273	0	5,222,634
2012	6.5%	4,236,671	1,137,273	0	5,373,944
2013	6.0%	4,387,981	1,137,273	0	5,525,254
2014	5.5%	4,539,291	1,137,273	0	5,676,564
TOTAL		\$76,397,795	\$18,417,338	\$16,903,894	\$111,719,028

74. Please list capital projects currently funded, with anticipated future funding, and without current funding? (February 25th Budget Workshop)

The following table lists the funded and non-funded portions of current Flood Control projects. Flood Control Projects on the backlog are without funding until FY2021.

Flood Control Project	FY2015 CIP Funding	FY2016 – FY2020 Anticipated CIP Funding
Bleinhein	Construction	
Brentwood Phase 1	Construction	
Brentwood Phase 2	Construction	
Celia	Construction	
Cherokee/Scotland	Construction	
Gaynor	Construction	
Myrtle/Morehead Phase 1	Construction	
Parkwood Phase 1	Construction	
Robinhood/Dooley	Construction	
Wiseman	Construction	
Lilly Mill	Design & Construction	
Meadowridge	Design	Construction FY2016
Louise	Planning & Design	Construction FY2016
Lyon Phase 1	Planning & Design	Construction FY2016
McAlway/Churchill	Planning & Design	Construction FY2016
Peterson	Planning & Design	Construction FY2016
Princeton/Somerset	Planning & Design	Construction FY2016
Alanhurst/Cherrycrest	Planning & Design	Construction FY2017
Cedars East	Planning & Design	Construction FY2017
Greenhaven/Pierson	Design	Construction FY2017
Hampton	Planning & Design	Construction FY2017
Hinsdale/Tinkerbelle	Planning & Design	Construction FY2017
Kenilworth/Romany	Planning & Design	Construction FY2017
Lincoln Heights	Planning & Design	Construction FY2017
Mary Alexander	Planning & Design	Construction FY2017
Myrtle/Morehead Phase 2	Planning & Design	Construction FY2017
Water Oak	Planning & Design	Construction FY2017
Wanamassa	Planning	Design FY2016/Construction FY2017
6 th & Graham	Planning & Design	Construction FY2018
Edgewater/Rosecrest Phase 1	Planning & Design	Construction FY2018
Lyon Phase 2	Planning & Design	Construction FY2018
Hill	Planning & Design	Construction FY2018
Shamrock Gardens	Planning & Design	Construction FY2018
Yancey	Planning & Design	Construction FY2018
Margaret Turner	Planning	Design FY2016/Construction FY2018
Chandworth	Planning & Design	Construction FY2019
Chatham	Planning & Design	Construction FY2019
Parkwood Phase 2	Planning & Design	Construction FY2019
Tattersall	Planning & Design	Construction FY2019
Wilkinson	Planning & Design	Construction FY2019
Beckwith/Meadow	Planning & Design	Construction FY2020
Cutchin	Planning & Design	Construction FY2020
Edgewater/Rosecrest Phase 2	Planning & Design	Construction FY2020

75. What revenue does the City collect from the County and the School System in Storm Water fees? (May 6th Budget Workshop)

City Storm Water Services collects minor storm water system fee revenue from Mecklenburg County and Charlotte-Mecklenburg Schools based on the square feet of impervious surface on

County and School land. Using the FY2016 proposed rates, the County will be charged \$927,323 after qualified credits are applied, and Charlotte-Mecklenburg Schools will be charged \$1,485,603 after qualified credits are applied.

76. How will the rate adjustments included in the FY2016 Recommended Budget for Storm Water Services impact the Storm Water capital program and the City's ability to respond to requests for service from property owners? (May 6th Budget Workshop)

FY2016 Recommended Storm Water Rate Structure

The FY2016 Recommended Budget for Storm Water Services includes a change to the rate structure from two rates to four rates. Increased revenue from the new rate structure will support capital investments to complete additional maintenance and repair projects and flood control projects. The additional revenue and expanded capital program will improve the storm drainage system and reduce flood risks for all residents of Charlotte.

The number of aging, failing pipes and flooding problems continue to outpace available resources. When property owners call to request service, most problems are due to infrastructure failures. The backlog of requests for service is growing along with wait times for property owners.

- Approximately 1,000 property owners with high and medium priority requests are waiting 3 to 6 years for service
- An estimated 64 flood control projects to address large-scale neighborhood drainage are waiting for funding
- Approximately 6,000 low priority requests for service with limited resources

FY2016 Recommended Service Improvements

Specifically, the additional revenue from the FY2016 rate adjustments will provide funding to:

- Increase the number of high and medium priority requests evaluated each year from approximately 230 to 285 (average cost per request is \$70,000)
- Increase the average number of large-scale neighborhood drainage projects started each year from two to three (average cost per project is around \$8,000,000)
- Stop qualifying new low priority requests for service and conduct an evaluation of the existing low priority requests to benchmark costs and provide a more accurate funding projection for future years. Future funding of the existing low priority requests for service will be determined based on information gathered during the evaluation in FY2016.

Beginning in FY2016, the majority of the additional funding created by the rate adjustments will initially be used for large-scale neighborhood drainage projects, due to their relatively higher average project costs compared to the average costs for high and medium priority maintenance and repair projects. The number of maintenance and repair projects will be increased over the next few years, and by FY2026, 50.5% of funding supporting the Storm Water Services capital program will be allocated to high and medium priority maintenance and repair projects, and 40.0% will support the large-scale drainage projects, with the remaining 9.5% allocated to Water Quality projects.

77. What other changes to the Storm Water Services program are recommended to increase the City's ability to reduce the backlog of requests for service from property owners? (May 6th Budget Workshop)

Implementation of the following additional changes to Storm Water Services' policies and procedures in FY2016 may assist in increasing the number of high and medium priority projects and large scale drainage projects that can be completed.

- **Revise the Fee Credit Policy** – Revise the policy to reduce the maximum available credit (from 100% to something lower) to prevent an inequity from continuing in future years. The basis for fee credits should be the degree to which program need is reduced by land owner actions (may be 50-75%). The Storm Water fees are used for a variety of activities including federal Clean Water Act, maintaining street drainage and flood hazard mitigation. Land owner actions do not reduce the effort for these activities. In 2015, fee credits reduced revenue by approximately \$2.0M.
- **Lower Debt Service Coverage Ratio** – Debt service coverage ratio represents the amount of net operating revenue above annual debt service payments. The debt service coverage ratio for Storm Water Services of 3.95 in FY2015 (net revenue that is 3.95 times the annual debt payments) provides capacity to issue additional debt. Under the FY2016 proposed Fee Model, Storm Water Services plans to issue debt every two to four years until the coverage ratio is reduced to between 2.10 and 2.20. This lower debt coverage ratio will maximize debt issuance in future years while still maintaining sufficient capacity to respond to emergencies and meet rating agency requirements for current credit ratings. The additional debt capacity generated by the recommended rate adjustments along with the lower debt service coverage ratio will be used to complete more high and medium priority maintenance and repair and flood control projects.
- **Begin asset management activities** - Storm Water Services will also begin some asset management activities in FY2016 to enhance staff's ability to predict future budget needs by assessing the condition of the existing public drainage system. This assessment will include setting up a data collection program to process and evaluate several hundred critical infrastructure locations. By identifying potential issues for large infrastructure prior to system failure, the infrastructure can be reinforced and life of the asset can be extended with options such as pipe lining at a much cheaper cost than a large capital project.

Financial Partners

78. If the CRVA's funding request of \$150,000 for the Film Commission is not funded, could the CRVA prioritize their dedicated revenue source funding to use towards the Film Commission? (February 25th Budget Workshop)

Potential Funding of Film Commission Using Dedicated Revenues

In their FY2015 budget, the CRVA also allocated \$150,000 of their dedicated Occupancy Tax and Food & Beverage Tax proceeds to the Film Commission as CRVA's part of the City, County, and CRVA three-way agreement to provide an adequate level of funding to stabilize the Film Commission as the lead organization that supports that industry.

Per CRVA, if the City discontinues the \$150,000 funding for the Film Commission from General Fund discretionary funds, the CRVA would not be able to absorb that portion and will not be able to sustain its current level of engagement in promoting the Charlotte region as a location for film and commercial/television productions. The impact would be less solicitation, marketing, and service support available to the Film Industry, which has two major hubs in North Carolina: Wilmington and Charlotte. CRVA responded that reduced funding towards an aggressive and competent effort to maintain and grow the film industry may result in jobs supporting film to be lost to Wilmington or other locations.

City Funding to CRVA

The City of Charlotte provides funding to the CRVA for two different programs through two separate revenue sources:

- Visit Charlotte – Dedicated Occupancy Tax and Food & Beverage Tax Proceeds
- Charlotte Regional Film Commission – Discretionary General Fund Revenues

CRVA's FY2016 Film Commission Request – Discretionary General Fund Revenue

CRVA's FY2016 Charlotte Regional Film Commission request of \$150,000 is for General Fund discretionary funds. Through the Charlotte Regional Film Commission, CRVA promotes the Charlotte region as a location for film and commercial/television productions. CRVA's Charlotte Regional Film Commission provides site location, crew, equipment, stage, and support service information for commercials, independent films, television series, and still photography shoots.

CRVA's FY2016 Visit Charlotte Funding Request – Dedicated Revenues

CRVA's FY2016 funding request of \$13,597,941 is for their Visit Charlotte division. The Visit Charlotte division promotes the region with sales and marketing activities that bring conventioners, meeting and special event attendees, and tourist to Charlotte every year.

Funding for CRVA's Visit Charlotte program are based on actual funding distributions from the occupancy tax and prepared food and beverage tax proceeds in compliance with Chapter 908 of the 1983 Session Laws, as amended by Chapters 821 and 922 of the 1989 Session Laws and Chapter 402 of the 2001 Session Laws (collectively "Tax Legislation"), as follows:

For general tourism marketing:

- First 3% Occupancy Tax,
- 50% of the first \$1 million collected,
- 35% of the 2nd \$1 million collected, and
- 25% of all revenue above \$2 million

For Convention Center marketing:

- 15% of collected 2nd 3% Occupancy Tax and 1% Food and Beverage Tax

For Business Development:

- \$1.9 million in FY2015 growing at 3% a year

79. What have been the Film Commission's activities and achievements in the past year? (February 25th Budget Workshop)

The following response was provided directly by CRVA:

"The first and most prominent goal of the Charlotte Regional Film Commission (CRFC) is to promote on location filmmaking within the region. The CRFC has a strong commitment to film and video production, and services all projects: still photography, commercials,

television, feature, and independent films. The CRFC's primary services include: information of local filming procedures; site location photography and location library; scouting services within the region; information on crew, equipment, stages and support services; and liaison with city, county, state, and federal governments. The CRFC's goal is to promote the Charlotte Region as a superior film location, and to sustain and build awareness of the Charlotte Region in the film and video industries both domestically and internationally.

Currently, the CRFC is in the process of launching a new brand for its office, which includes a new logo, website, collateral, and promotional items. The CRFC is also working with a new database provider that manages locations, contacts, and project information allowing the Charlotte Region to be more competitive in the marketplace.

The CRFC hired two new employees for its Film Office: Film Coordinator and Location Manager. The addition of this staff has allowed more time for the Director to proactively promote the city and better respond to inquiries and service projects that choose Charlotte as their location. The CRFC is also building a more robust location database, which includes photos of locations from across the region that will assist the CRFC in selling the Charlotte Region as a diverse film location (city, rural, mountains, small town, etc.). These improvements will allow the CRFC to realign their time and energy in the marketplace.

Reductions to the NC Film Incentives have produced ripple effects, locally, with a steady decline in pipeline leads and productions for film and television. However, the CRFC has realigned its focus on recruiting commercial projects, reality-TV shows, sports marketing, and photography – all projects that do not depend on the state's incentive and have been successful in the region in the past. The CRFC's pipeline of projects will continue to grow and demonstrates a continued need for the City and County's investment in the CRFC.

CRVA-Charlotte Regional Film Commission's activities and achievements in the past year are as follows:"

Film Commission Performance Metrics:

Measure	FY2015 Mid-Year Actual	FY2016 Target
Number of qualified film/TV prospects/leads generated	64	125
Increase the number of feature film/TV prospects/leads generated for the Charlotte Region	10	8
Total budget for films/TV projects produced	\$38 million*	\$9 million
Number of film crew positions filled locally	680*	400

*Estimates as final numbers unavailable until released by the North Carolina Department of Revenue

Tradeshows, conferences, and sales missions:

- Cineposium- Association of Film Commissioners International Conference – NYC
- NYC Sales Mission - called on production companies
- Sundance Film Festival – sponsored event at festival with the NC Film Office and Wilmington Film Commission
- Locations Trade Show in LA – sponsored booth with NC Film Office, Wilmington Film Commission and Piedmont Triad Film Commission
- International Film Festival Summit

Membership of Associations:

- Association of Film Commissioners International
- Associate member of Association of International Commercial Producers

Recent Projects:

- BANSHEE (HBO) 3rd season
- VACATION (Warner Brothers)
- PAPER TOWNS (FOX)
- 4 BLOOD MOONS (Independent film)
- MAX (MGM)
- ASHBY (Independent film)
- OUTCAST (HBO and International FOX); Pilot recently shot in York and Chester counties utilizing crew and vendors from the Charlotte region; Project has been picked up and is planning on returning to the Charlotte region.

Reality Shows:

- HOUSE HUNTERS
- LAST COMIC STANDING
- A SALE OF TWO CITIES
- WHO DO YOU THINK YOU ARE?
- MTV CATFISH
- UNNAMED NEW REALITY SHOW
- DOLLARS AND SENSE (Catwalk Productions)

Commercials:

- PRUDENTIAL – national commercial filmed at the NASCAR Hall of Fame
- BANK OF AMERICA
- DUKE ENERGY
- US ARMY
- NATIONWIDE
- BOJANGLES
- MOUNTAIN DEW
- NCEL
- NAPA
- BURGER KING
- USPS
- EVERHART HEALTH
- LOWES
- GRASTEK
- VALVOLINE
- GOOD YEAR
- SUBWAY
- KIOTI TRACTOR

Print:

- MACY'S
- ZURICH INSURANCE
- MACK TRUCK
- KIOTI TRACTOR

80. Please provide additional information on the new request from the Foundation For The Carolinas' Third Grade Reading Initiative? (February 25th Budget Workshop)

Overview

The Third Grade Reading Initiative ("Read Charlotte") is a new collaborative effort to double the percentage of third grade students reading at grade level. Currently, more than half of all Charlotte-Mecklenburg Schools' third graders are not reading at grade level. If a child is not reading at or above grade level by the end of the third grade, he or she is four times more likely to drop out of school than a child who is reading proficiently.

Committee Discussion

On October 17, 2014, the Third Grade Reading Initiative was discussed at Council's Economic & Global Competitiveness (ED&GC) Committee, following requests for staff to explore opportunities for collaboration with private and foundation efforts, including related to the Third Grade Literacy initiative. As a result of those discussions, staff suggested that the Third Grade Reading Initiative submit a request through the Financial Partner Process.

Current Status of Third Grading Reading Initiative

As of January 28, 2015, the Foundation For The Carolinas has raised \$4.6 million from private foundations and corporations. The funds raised are three and five year commitments, at a minimum, of \$100,000 annually. The following table lists the nine lead funders for "Read Charlotte" and the term of their funding commitment:

Organization	Amount/Year	# Years	Total Pledged
Bank of America	\$100,000	3 years	\$300,000
CD Spangler Foundation	\$100,000	5 years	\$500,000
Duke Energy Foundation	\$100,000	5 years	\$500,000
Foundation For The Carolinas	\$100,000	5 years	\$500,000
PNC	\$100,000	5 years	\$500,000
PricewaterhouseCoopers LLP	\$100,000	3 years	\$300,000
The Belk Foundation	\$150,000	5 years	\$750,000
The Duke Endowment	\$150,000	5 years	\$750,000
Wells Fargo	\$100,000	5 years	\$500,000
Total To-Date			\$4,600,000

Financial Partner Budget Process

The Financial Partner information provided to Council at the February 25, 2015 Budget Workshop included all requests received from organizations that submitted applications to the City. The City Manager will present his Financial Partner funding recommendations to Council at their April 8, 2015 Budget Workshop.

81. What are the funding sources for the current year (FY2015) allocation to the Charlotte Mecklenburg Housing Partnership? (February 25th Budget Workshop)

The Charlotte Mecklenburg Housing Partnership (CMHP) is funded with local Innovative Housing Pay-As-You-Go (PAYGO) funds and federal grant funding from the U.S. Department of Housing and Urban Development (HUD). The CMHP Affordable Housing Contract is funded with PAYGO and a portion of the City's Community Development Block Grant (CDBG) allocation. The CMHP HouseCharlotte program is funded with PAYGO and the HUD HOME Investment Partnerships Program grant (HOME).

The table below provided the current funding sources and amounts for CMHP's FY2015 Affordable Housing Contract and HouseCharlotte programs:

Charlotte Mecklenburg Housing Partnership Program	City PAYGO Funds	Federal HUD Grant Funds	Type of HUD Grant	Total FY2015 Funding
Affordable Housing Contract	\$490,000	\$1,470,000	CDBG	\$1,960,000
HouseCharlotte	\$57,750	\$173,250	HOME	\$231,000

82. Please provide a comparison of City and County arts and cultural spending. (March 2nd Council Workshop)

[Attachment #5](#) provides the tables listing the different arts and cultural funding components for both the City of Charlotte and Mecklenburg County.

83. 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? (April 8th Budget Workshop)

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.

Charlotte Regional Partnership Member Jurisdiction	2013 Population (100% @ 15 cents per capita)	2013 Population (50% @ 30 cents per capita)	Per Capita Contribution FY2016 Request
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.

CCOG Member Jurisdiction	2013 Population Estimate	FY2016 Requested Dues
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

CCOG Member Jurisdiction	2013 Population Estimate	FY2016 Requested Dues
Gaston County	209,571	\$50,297
Gastonia	72,947	\$17,507
Granite Quarry	2,998	\$750
Harrisburg	13,996	\$3,359
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

CCOG Member Jurisdiction	2013 Population Estimate	FY2016 Requested Dues
Spencer Mountain	0	\$750
Stallings	14,777	\$3,546
Stanley	3,609	\$866
Stanly County	60,612	\$14,547
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
Total	3,600,397	\$875,869

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%	\$762
Marvin	5,579	0.5%	\$1,534
Matthews	27,198	2.2%	\$7,479

CRTPO Member Jurisdiction	Member Population	% of Population	FY2016 Local Match
Mecklenburg County	758	0.1%	\$208
Mineral Springs	2,639	0.2%	\$726
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%	
Total	1,238,474	100%	\$340,549

84. If reductions were made to the proposed FY2016 Out of School Time Partner allocations, what is the impact to the number of children served? (April 8th Budget Workshop)

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

- o 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.

Scenario 1 – Evaluation Committee Recommendation: \$815,007 federal CDBG; \$164,927 PAYGO = 901 children served, six agencies funded

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
Total		\$979,934	\$979,934	\$979,934	901

Scenario 2 – Eliminate PAYGO allocation evenly among all recommended agencies: \$815,007 federal CDBG; \$0 PAYGO = 749 children served, six agencies funded

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
Total		\$979,934		\$815,007	749

Scenario 3 - Eliminate PAYGO allocation for agencies with lower scores: \$815,007 federal CDBG; \$0 PAYGO = 753 children served, five agencies funded					
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		\$66,000	55
YWCA	236	\$200,000		0% PAYGO (\$0)	\$149,007
Bethlehem Center	221	\$113,934		\$0	0
Total		\$979,934		\$815,007	753

85. Provide background of when Community Link and Crisis Assistance Ministries moved from General Fund to PAYGO and why? (April 8th Budget Workshop)

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.

86. 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? (April 8th Budget Workshop)

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.

Arts & Science Council (ASC) Financial Partner Funding by City and County				
ASC Program	County: FY15 Funding for ASC	City: FY15 Funding for ASC	County: FY16 Request from ASC	City: FY16 Request from ASC
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
Total	\$350,000	\$2,940,823	\$2,300,000	\$3,980,823

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.

87. 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? (April 8th Budget Workshop)

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		
Current Financial Partner Requests								
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		
Youth Development Initiative	94,710		0	\$0		Did not apply		
YWCA Central Carolinas After School Enrichment	158,826		200,000	\$200,000		236		
New Financial Partner Requests								
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				
TOTAL	\$1,307,646		\$1,327,934	\$979,934				

88. 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? (April 8th Budget Workshop)

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
Financial Partners Receiving 75% Federal & 25% City PAYGO Funds					
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
Sub Total	\$2,191,000	\$547,750	\$2,191,000	\$1,643,250	-\$547,750
Financial Partners Receiving 100% City PAYGO Funds					
Community Link	\$450,000	\$450,000	\$450,205	\$0	-\$450,000
Crisis Assistance	380,000	380,000	500,000	0	-380,000
Sub Total	\$830,000	\$830,000	\$950,205	\$0	-\$830,000
Grand Total	\$3,021,000	\$1,377,750	\$3,141,205	\$1,643,250	-\$1,377,750

89. What would be the impact of transferring \$1 million in Arts & Science Council funding to the Tourism II Fund? (April 8th Budget Workshop)

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
Total Capital Needs FY2016 – FY2019		\$58.5 million

90. How much of PAYGO goes to out of school time financial partners? (May 6th Budget Workshop)

The Preliminary FY2016 Operating Budget includes \$164,927 in PAYGO funds for Out of School Time agencies; this is a decrease of \$357,458 below the FY2015 PAYGO allocation of \$522,385. There is an additional \$815,007 in FY2016 federal grant funds (the maximum allowable amount) appropriated to these agencies. The following table details the recommended funding and the number of children to be served.

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
Total		\$979,934	\$979,934	\$979,934	901

General Community Investment Plan

91. What would be the impact on future debt service capacity for the General Community Investment Plan if the State Legislature changed the sales tax distribution methodology to a per-capita only distribution? (January 30th Council Retreat)

- The potential change in distribution methodology would impact the local option sales tax (Articles 39 and 42) currently distributed based on point of collection, and the City Hold Harmless sales tax, currently distributed using a mix between point of collection and per-capita.
- The City allocates Articles 39, 42, and Hold Harmless local option sales tax revenues to the General Fund, with a portion then transferred to the General Capital Pay-As-You-Go Fund. The potential change in distribution methodology would result in an estimated loss to the City of \$29.1 million in sales tax revenues, all of which would impact the General Fund, with no impact to the Debt Service Fund.
- Article 40 Sales tax revenues dedicated to the General Debt Service Fund to support future debt service capacity are already collected on a per-capita only basis. As a result, there would be no impact on future debt service capacity for the

General Community Investment Plan if the State Legislature changed the sales tax distribution methodology to a per-capita only distribution.

The table below shows the allocation of the sales tax revenue by type, the current distribution methodology for each, and the impact of the potential loss of \$29.1 million.

State Statute	Current Distribution Method	Estimated Potential Loss (\$ millions)
General Fund		
Article 39	Point of collection	(\$16.8)
Article 42 ^(a)	Point of collection	(\$8.0)
City Hold Harmless ^(b)	Point of collection/Per-Capita	(\$4.3)
Total General Fund		(\$29.1)
Municipal Debt Service Fund		
Article 40 (Debt Service)	Per capita Only	\$0.0
Total All Funds		(\$29.1)

^(a) A portion of the Article 42 sales tax in the General Fund is transferred to the Pay-As-You-Go Fund for capital support, in an amount equal to the Article 40 (per capita) collection. As a result, the estimated potential loss of sales tax revenue if the State Legislature changed the sales tax distribution methodology to a per-capita only distribution should have no impact on the Pay-As-You-Go Fund.

^(b) Counties are required to hold municipalities harmless due to the repeal of Article 44 Sales Tax

92. What are Two-Thirds Bonds, and does the City use this financing approach for General Obligation debt? (January 30th Council Retreat)

Generally, when a local government issues general obligation (G.O.) debt—pledging its taxing power as security for the borrowing—it must first obtain voter approval. Two-thirds Bonds are an exception to the requirement to obtain voter approval for issuance of G.O. debt. Through Two-thirds Bonds, local governments may issue G.O. debt without voter approval in an amount up to two-thirds of the amount by which it reduced its outstanding G.O. debt in the preceding year.

The amount of two-thirds capacity that could be issued is calculated by determining the net reduction in principal payments on outstanding G.O. debt in the previous fiscal year. Principal payments on new G.O. debt issued during that same fiscal year must be subtracted from principal payments retired on existing outstanding debt before calculating the two-thirds capacity. For example, if a City retired \$6,000,000 in principal payments on outstanding G.O. debt in the preceding year, but added \$3,000,000 in principal payments for newly-issued G.O. debt, it could only issue non-voted G.O. debt (Two-thirds Bonds) in an amount up to two-thirds of the net \$3,000,000 ($\$6,000,000 - \$3,000,000$) X (0.667) = \$2,000,000 in Two-thirds Bond capacity.

Additional requirements and restrictions

- Two-thirds bonds must be issued in the year immediately following the year in which the debt was reduced. Two-thirds capacity may not be accumulated from year to year
- Two-thirds bonds can be used for any of the same authorized purposes as voter-approved G.O. bonds, with a few exceptions:

The following purposes for which G.O. debt may be used are always subject to voter approval, and therefore cannot be funded with non-voted two-thirds bonds:

- Auditoriums, coliseums, arenas, stadiums, civic centers, convention centers, and facilities for exhibitions
- Athletic and cultural events, shows, and public gatherings
- Art galleries, museums, art centers, and historic properties
- Urban redevelopment
- Public transportation (Transit)
- Cable television systems

In FY2014, the City of Charlotte retired \$111,643 in principal on outstanding G.O. debt, but added \$239,543 in principal for new G.O. debt issued in FY2014. As a result, the City has no two-thirds bond capacity for FY2015. With the approval of the \$816.4 million Community Investment Plan covering four G.O. Bond Referenda between 2014 and 2020, it is unlikely the City will have any Two-thirds Bond capacity at least until after 2020. Additionally, any two-thirds capacity that may be created after 2020 will be a relatively small amount and would be insufficient to fund any significant capital infrastructure needs.

93. Can the “Potential Capital Considerations for FY2015-FY2019” be categorized by urgency and proposed timeline? (March 17th Budget Workshop)

Staff has reviewed the capital needs identified last year in the “Potential Capital Considerations for FY2015-FY2019” list, along with additional capital needs that have been identified for FY2016-FY2020 from requests submitted by departments on January 23rd, 2015. From this review, a list of High Priority Potential Needs for FY2016 and other Potential Adjustments and Additions to be considered in FY2017 as part of the biennial review of the Approved General Community Investment Plan has been developed and will be presented for City Council discussion at the April 8th Budget Workshop during the General Community Investment Plan Update.

94. Please provide the prioritizations and policies associated with the Community Investment Plan? (March 17th Budget Workshop)

Below are the Community Investment Plan Program Policies included annually in the Community Investment Plan section of the Preliminary Strategy Operating Plan (i.e. “City Managers Recommended Budget Book”) and the Final Strategic Operating Plan (i.e. “Council Adopted Budget Book”). These Program Policies provide guidance to the City Manager and City Council in prioritizing identified capital infrastructure needs.

COMMUNITY INVESTMENT PLAN PROGRAM POLICIES

1. Evaluate capital projects requests according to the following priorities:
 - 1st priority: Maintenance and/or retrofitting of existing infrastructure
 - 2nd priority: Replacement of existing infrastructure
 - 3rd priority: Expansion of existing infrastructure
 - 4th priority: New infrastructure

2. Develop and implement a capital program based on Smart Growth principles:
 - ♦ Maintain land use planning
 - ♦ Sustain effective land use decisions
 - ♦ Strengthen neighborhoods
 - ♦ Build a competitive economic edge
 - ♦ Design for livability
 - ♦ Safeguard the environment
 - ♦ Expand transportation choices
 - ♦ Use public investment as a catalyst
3. Preserve the existing tax base, a fundamental principle for City capital investment decision-making
4. Affirm neighborhoods as a foundation of the community and emphasize a reinvestment program for all neighborhoods
5. Form partnerships with citizens and businesses to leverage public dollars and make the community one of choice for living, working, and leisure activities
6. Serve as a platform for economic development through the funding of priority projects in targeted investment areas
7. Provide a balanced capital plan, which funds the highest priority community needs in a variety of program areas
8. Anticipate infrastructure and facility needs resulting from future changes in the City's boundaries and density that are consistent with Council's development and growth policies
9. Comply with applicable federal and state mandates

95. 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? (April 8th Budget Workshop)

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%
Total Property Tax Rate	46.87¢	

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

96. Please provide a comprehensive summary of all revenue streams going into capital programs/debt capacity? (April 8th Budget Workshop)

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.

PAYGO Revenues	FY2015	% of Total Revenue
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%
Total All Revenues	\$55,166,239	100%

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.

Municipal Debt Service Revenues	FY2015	% of Total Revenue
Property Tax	\$ 86,204,445	70.1%
Sales Tax	15,500,000	12.6%
Contributions from Other Funds ^(a)		
General Fund	15,662,983	12.7%
Powell Bill Fund	1,257,486	1.0%
Mecklenburg County ^(b)	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 ^(c)	1,080,981	0.9%
Total All Revenues	\$ 55,166,239	100%

- (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.

97. How does the FY2016-FY2017 List of Potential Adjustments and Additions to the General Community Investment Plan presented to City Council on April 8, 2015 compare to the List of Potential Capital Considerations presented to City Council in March 2014? Please also show the estimated additional operating expenses for both lists. (April 8th Budget Workshop)

The \$248.6 million List of Potential Capital Considerations was presented to City Council in March 2014 for transparency purposes to show future capital needs as identified by City departments. Not all of the needs identified on that list can, or will be done, given limited available capital resources and current Council priorities.

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 8th 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	FY2015 Funded	FY2016	FY2017	Updated April 2015
	Capital Cost	Capital Cost	High Priority	Pending	Additional Annual Operating Expense
FY2015 - FY2019 CIP - Potential New Considerations					
Neighborhoods & Housing Diversity					
A New Home (Rental Assistance Endowment)	8,000,000	2,000,000	2,000,000		\$0
Total Neighborhoods & Housing Diversity	8,000,000	2,000,000	2,000,000		\$0
Transportation					
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
Total Transportation	37,500,000	5,200,000	8,500,000	12,340,000	157,500
Facilities/Infrastructure/Equipment					
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
Total Facilities/Infrastructure/Equipment	74,050,567	4,061,540	14,300,000	17,530,000	\$3,893,894
Technology					
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
Total Technology	\$ 65,192,330	\$ 2,476,481	\$ 1,700,000	\$ 3,894,000	\$9,734,000
Other Facilities					
Time Warner Cable Arena Improvements	41,915,310	30,500,000			\$0
Bojangles Coliseum Renovations	12,000,000	15,453,375			\$0
Total Other Facilities	53,915,310	45,953,375	-	-	\$0
Total Potential New Considerations	\$ 238,658,207	\$ 59,691,396	\$ 26,500,000	\$ 33,764,000	\$13,785,394
Percent of Potential New Considerations Funded in FY2015 25.0%					
FY2015 - FY2019 CIP - Adjustments to Approved Community Investment Plan					
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
Total Adjustments to Approved CIP	10,000,000 +	-	-	2,000,000	\$8,525,000
Total All Capital Cost	\$ 248,658,207 +	\$ 59,691,396	\$ 26,500,000	\$ 35,764,000	\$22,310,394
Percent of All Capital Cost Funded in FY2015 24.0%					

98. How are revenues from Vehicle Rental Tax and Motor Vehicle Licenses used in the FY2015 Council-approved Pay-As-You-Go Fund? (April 17th Budget Workshop)

In the FY2015 Council-approved Pay-As-You-Go Fund, 100% of revenues from Vehicle Rental Tax and 80% of revenues from Motor Vehicle Licenses were used to fund the City's contribution to the CATS Maintenance of Effort (MOE) and the Mecklenburg County and Towns share of transit funding. The following table shows the FY2015 budgeted amounts for each of these revenue sources, and the distribution of those revenues.

Revenue & Expenditure	FY2015 Revenue	Used for Transit	
Vehicle Rental Tax	\$ 10,343,148	\$ 10,343,148	100%
Motor Vehicle Licenses	12,220,161	9,775,541	80%
Total Transit Revenue	\$ 22,563,309	\$ 20,118,689	
CATS MOE		19,520,560	
County/Towns Transit Share		598,129	
Total Expense		\$ 20,118,689	
Remaining Motor Vehicle License Revenue		\$ 2,444,620	20%

\$2.4 million in remaining Motor Vehicle License revenue not used for transit-related activities is used to support the General Pay-As-You-Go program, including business corridor revitalization and transportation infrastructure.

99. What is the expected economic impact associated with the CityLYNX Gold Line corridor? (April 17th Budget Workshop)

Below are economic impact data associated with the CityLYNX Gold Line Phase 2 project that have been derived from two studies conducted separately for the City by BAE Urban Economics in May 2013 and Noell Consulting in April 2014.

BAE Urban Economics

In May 2013, an Economic Development Update Study of the Charlotte CityLYNX Gold Line Project was conducted by BAE Urban Economics. The Study concluded that Gold Line Phase 2 would generate a total of 731 additional residential units; 21,800 square feet of additional retail space; 276,700 square feet of additional office space; and 101 additional hotel rooms by 2035. This represents an increase of approximately 1.1 million or more square feet in new development over the next 20 years, in addition to the development activity that would otherwise occur without the Gold Line. According to the BAE Study, *"The increase in development would occur because Phase 2 of the CityLYNX Gold Line would increase homebuyer, renter, and commercial tenant demand for locations along the Gold Line corridor, and motivate developers to invest in additional development."*

Noell Consulting

Nationally, streetcar projects have proven to be a catalyst for economic development, revitalizing neighborhoods and creating a high return on investments. The following table provided by Noell Consulting summarizes the actual and projected development investment along the streetcar routes in various cities.

Economic Impact of Streetcar Projects					
City	Year Completed	Streetcar Infrastructure Cost	Development Investment along Route	Return on Investment	Length (miles)
Kenosha, WI	2000	\$5.2 million	\$150 million(A)	29:1	2.0
Portland, OR	2001-2005 (original) 2012 (eastside)	\$103 million (original) \$121 million (eastside)	\$3.5 billion(A)	33:1	4.0
Tampa, FL	2002	\$48.3 million	\$1.0 billion(A/P)	21:1	2.3
Memphis, TN	2004	\$104.3 million	\$2.0 billion(A/P)	19:1	2.2
Seattle, WA	2007	\$50 million	\$4.0 billion(A/P)	80:1	1.3
Tucson, AZ	2014	\$196 million	\$900 million(A)	5:1	3.9
Atlanta, GA	2014	\$99 million	\$1.2 billion(A/P)	12:1	2.7
Kansas City, MO	2016	\$102 million	\$308 million(A/P)	3:1	2.0
Providence, RI	2018	\$126 million	\$1.1 billion(P)	9:1	2.5
Charlotte, NC					
Phase 1	2015	\$37 million	\$ 1.6 billion(P)	43:1	1.5
Phase 2	2019	\$150 million	\$ 3.0 billion(P)	20:1	2.5
<i>A = Actual; P = Planned/Projected</i>					
<i>Source: Charlotte – Noell Consulting / Reconnecting America / HDR Engineering / Community Streetcar Coalition / URS-AECOM Engineering</i>					

The CityLYNX Gold Line Phase 1 and 2 estimates of development potential through Year 2035 shown in the above table were provided by Noell Consulting in an April 2014 analysis conducted for the Charlotte Planning Department as part of the City's submittal of its Small Starts Grant application. The area of analysis included ½ mile around the future stations within the Gold Line Phase 2 corridor and development potential is estimated to a horizon year of 2035. Analysis of a ½ mile ring around a future station is consistent with FTA's required methodology for land use analyses under the Small Starts and New Starts grant programs. Noell Consulting has performed similar analyses for the LYNX Blue Line, LYNX Blue Line Extension, and LYNX Red Line.

As shown on [Attachments #6, #7 and #8](#) (Exhibits 28, 31, and 37 from the Noell Report), \$3.0 billion in potential development investment is estimated to occur by 2035 along the 2.5 mile CityLYNX Gold Line Phase 2 Corridor as follows:

Gold Line Phase 2 Corridor	Value of Development (Less Land)
Western Portion (Wesley Heights Way to French Street)	\$0.14 billion (Exhibit 28)
Central Portion (Tryon Street to Irwin Avenue)	\$2.24 billion (Exhibit 31)
Eastern Portion (Hawthorne & 8 th Street to Sunnyside)	\$0.62 billion (Exhibit 37)
Total Potential Development Investment	\$3.00 billion

100. What is the actual and expected incremental growth in property tax revenues generated by LYNX Blue Line and CityLYNX Gold Line? (April 17th Budget Workshop)

LYNX Blue Line

An evaluation of incremental growth in property valuations and property tax revenues generated along the LYNX Blue Line corridor has been delayed pending the completion of the County's review of assessed property values from the 2011 revaluation. The valuation portion of the County's review has been completed and a final report was presented to the County Commission on March 3rd. The County is now proceeding with the appeals process. City-wide, there are currently 8,633 outstanding appeals representing an aggregate assessed value in excess of \$9.5 billion. Until the appeals process is complete, it will be difficult to accurately determine the current assessed property values along the Blue Line corridor to compare against the assessed values prior to the completion of the Blue Line. As the appeals and discovery process proceeds, City staff will begin working with the County Tax Assessor to identify the final assessed values of property within a one-half mile radius of each of the Blue Line stations. Staff will then compare the current values in these identified areas with the values in the same geographies prior to the completion of the Blue Line to determine incremental growth in property tax generated by the Blue Line.

Additionally, as part of a separate work effort from the Metropolitan Transit Commission (MTC) Transit Funding Working Group, CATS has retained Ernst & Young to conduct a "value capture" analysis that will look at the historical change in assessed values along the Blue Line and then, using those historical trends, develop a model to project a range of assessed values through 2030 for both the Blue Line Extension and proposed LYNX Red Line.

CityLYNX Gold Line

The May 2013 BAE Urban Economics Study of the CityLYNX Gold Line Phase 2 Project indicated that if the City were to establish a Tax Increment Financing (TIF) district covering properties within a ¼-mile radius on either side along the four-mile Gold Line Phase 1 and 2 route, the potential private investment within that corridor could generate between \$4.7 million and \$7.0 million per year in incremental property tax revenues by 2035. The BAE Study analyzed the potential growth in incremental assessed value and annual property tax revenue by 2035 using three scenarios: Conservative, Expected, and Best Case. The following table summarizes the findings of the BAE Study.

Scenario	Incremental Change in Assessed Value	Incremental Annual Property Tax Revenue(a) (b)
Conservative	\$2,114,793,760	\$4,660,445
Expected	\$2,354,133,419	\$5,497,176
Best Case	\$2,793,298,363	\$7,032,497

Notes:

- (a) The estimated incremental property tax revenue assumes the existing property tax rate of 43.7 cents at the time the report was conducted in 2013.
- (b) Annual TIF Revenue represents only 80% of available tax increment attributable to real property, less tax increment allocations to the Elizabeth Ave project from 2020 to 2030 and to the Gateway Station project from 2020 and on.

Sources: Mecklenburg County, 2012; City of Charlotte, 2013; BAE, 2013

101. *What are the estimated advertising revenues expected from the CityLYNX Gold Line when Gold Line Phase 2 begins operations? (April 17th Budget Workshop)*

In September 2014, CATS staff provided initial estimates for other potential sources of revenue to support the annual operating costs of the Gold Line after Phase 2 begins operations, including approximately \$200,000 annually from naming rights and \$93,000 annually from advertising.

102. *What is the operating budget impact of completing the full 10 planned miles of the Gold Line? (May 6th Budget Workshop)*

The CityLYNX Gold Line has been part of the Metropolitan Transit Commission (MTC) Corridor System Plan since 2002 and was reaffirmed in the 2030 Corridor System Plan update adopted by the MTC on November 15, 2006. Overall the planned Gold Line corridor is 10 miles and is being constructed in phases, based largely on the availability of funding, as well as the complexities of design.

During early planning stages for the full 10-mile CityLYNX Gold Line corridor, staff developed initial estimates for annual operating costs at approximately \$1.0 million per corridor mile, or \$10.0 million. If adjusted for inflation, this estimate would likely increase to approximately \$12 million annually for the fully-built 10 mile corridor. Specific operating cost estimates for the full 10-mile corridor will be difficult to determine prior to developing more specific design details for subsequent phases. Additionally, operating costs will vary depending on several factors that are unknown at this time, including frequency of service, hours of operation, number of stops, and final fleet size.

103. *What are the funding sources for the City's \$75 million share of capital costs for Phase 2 of the CityLYNX Gold Line? (May 6th Budget Workshop)*

The City's \$75 million 50% local match for the \$150 million CityLYNX Gold Line Phase 2 project was appropriated from a variety of sources in the General Community Investment Fund, including existing available debt capacity, existing business corridor funds, and use of unallocated and contingent capital accounts within revenue sources other than property taxes. The following table lists the City funding sources for CityLYNX Gold Line Phase 2.

CityLYNX Gold Line Phase 2 - \$75 million City Match Funding Allocation	
	<u>Total \$75.0M</u>
Existing Debt Capacity	
Unallocated debt capacity	\$ 36,960,017
Transportation Capital Project Savings	9,357,599
Business Corridor Revitalization (Current Balance)	1,132,616
Total Debt Capacity	\$ 47,450,232
Existing Pay-As-You-Go Capital	
Business Corridor Revitalization (Current Balance)	16,245,062
Completed project Savings	3,627,615
Capital Reserve	5,325,200
Future Road Planning & Design	2,000,000
Economic Development Loan and Grant Fund	351,891
Total Pay-As-You-Go	\$ 27,549,768
Total City Funding	\$ 75,000,000

No Property Taxes. The sources for the \$75.0 million local match are funded in the Municipal Debt Service Fund (\$47.5 million) and the Pay-As-You-Go Fund (\$27.5 million) in the General Community Investment Plan. The Municipal Debt Service Fund is supported by several revenues, including property tax, sales tax, and interest on investments. The Pay-As-You-Go Fund is similarly supported by a variety of revenues including property tax, sales tax, interest on investments, capital reserves, and sale of City land.

The following two tables show the relative share of property tax revenue and non-property tax revenue for the past five years supporting the General Community Investment Pay-As-You Go Fund and the Municipal Debt Service Fund

General Community Investment Pay-As-You-Go Fund						
	FY11	FY12	FY13	FY14	FY15	5-Year Average
Total Revenue	\$ 58,341,584	\$ 61,247,099	\$ 46,555,537	\$ 50,714,934	\$ 55,166,239	\$ 54,405,079
Property Tax Revenue	9,425,588	9,860,583	10,551,366	10,571,447	10,832,639	10,248,325
Non-Property Tax Revenue	48,915,996	51,386,516	36,004,171	40,143,487	44,333,600	44,156,754
% Non-Property Tax Revenue	83.8%	83.9%	77.3%	79.2%	80.4%	80.9%
	Total Non-Property Tax Revenue Over 5 Years					\$ 220,783,770

Municipal Debt Service Fund						
	FY11	FY12	FY13	FY14	FY15	5-Year Average
Total Revenue	\$ 94,318,148	\$ 93,808,426	\$ 89,620,634	\$ 123,581,395	\$ 120,380,680	\$ 104,341,857
Property Tax Revenue	52,211,300	54,227,588	57,145,978	83,971,005	86,265,908	66,764,356
Non-Property Tax Revenue	42,106,848	39,580,838	32,474,656	39,610,390	34,114,772	37,577,501
% Non-Property Tax Revenue	44.6%	42.2%	36.2%	32.1%	28.3%	36.7%
	Total Non-Property Tax Revenue Over 5 Years					\$ 187,887,504

Note: Under current financing assumptions, the annual debt service on \$47.5 million in debt capacity to support the CityLYNX Gold Line Phase 2 would be approximately \$4.0 million, well within the average annual non-property tax revenue in the Municipal Debt Service Fund

While a specific property tax rate is allocated to both funds, property taxes comprise only a portion of capital funding. Based on an analysis of both funds over the past five years, the average annual revenues during that time show:

80.9%, or \$44.2 million of the revenue annually supporting the Pay-As-You-Go Fund is from sources other than property tax

36.7%, or \$37.6 million of the revenue annually supporting the Municipal Debt Service Fund is from sources other than property tax

Based on this analysis, staff has concluded that the City's \$75.0 million local share is well within an amount supported by non-property tax revenues such as sales tax, interest on investments, and other non-property tax revenue. Property tax revenues in these two funds will continue to be used to support traditional Pay-As-You-Go and debt-supported general community investment programs.

The FY2016 Recommended Budget segregates transit funding from property taxes by creating a separate accounting fund so that there is no comingling of transit funding with property taxes.

104. *What is the plan for funding the 2030 transit plan? (May 6th Budget Workshop)*

Funding the 2030 Transit Plan will require a diversified portfolio that includes dedicated funding sources and strategic financing options to build out the 2030 Plan as well as sustain operating costs. Funding sources include a dedicated sales tax, federal and state grants, and other revenues collected from fares, service reimbursements, maintenance of effort and advertisements. Financing strategies are leveraged in order to provide flexibility in maximizing transit funds. In recognition of the myriad of funding and financing sources that will be necessary, in 2013, a Transit Funding Working Group (TFWG) consisting of citizens representing disciplines and interests across the Charlotte region, was commissioned by the Metropolitan Transit Commission (MTC). The mission of the TFWG is to identify and build awareness of the funding challenges that must be faced in order to complete the 2030 Plan and to develop a set of recommendations and tools for the MTC to advance the 2030 Plan. As such, an Action Plan containing short, medium and long term initiatives has been identified and presented to the MTC. CATS staff is working with the TFWG to begin implementation as appropriate.

In 2013, CATS secured temporary financing for the Blue Line Extension (BLE) light rail project that included Certificates of Participation and three private placements with Bank of America. Additionally, CATS is in the process of applying for the Transportation Infrastructure Finance and Innovation Act (TIFIA) loan to cover permanent financing for the BLE project, which will improve cash flow, reduce overall financing costs, and allow transit funds to be reprogrammed toward other capital projects in the 2030 Plan.

105. Please list current and potential sales of City-owned land, and describe the City policy and practice for use of proceeds from land sales. (May 6th Budget Workshop)

The following table lists some of the City-owned land parcels currently and potentially offered for sale in the coming few months. Additional parcels will likely be added to this list in the coming months as Engineering & Property Management's Real Estate division completes work to prepare the parcels for sale.

City-Owned Parcel	Estimated Sales Price	Status
West Tyvola Road	\$1,610,000	May 11, 2015 Council Action to accept offer
2912 L.D. Parker Drive	\$36,500	May 11, 2015 Council Action to accept offer
1215 South Blvd	\$1,700,000	Listed for Sale
West Tyvola Road	\$1,092,000	To be listed for sale
Hamilton Street	\$70,000	To be listed for sale
Total Potential Proceeds	\$4,508,500	

Community Investment Plan Financial Policies approved by City Council call for the dedication of asset sales to the General Community Investment Plan to be used for one-time capital investments. In the current FY2015-FY2019 Community Investment Plan, \$2.1 million in land sale proceeds is programmed as revenue supporting capital investments in the Pay-As-You-Go program. As the properties listed in the above table are sold, the proceeds will be deposited in the Pay-As-You-Go Fund and will be available for use on future capital projects.

Additionally, the City is currently in the process of selling five City-owned land parcels associated with the I-277 Interchange improvements. Staff estimates that excess proceeds from the sale of the five I-277 parcels will produce between \$2.5 million and \$3.0 million that will be available for use on future capital projects. The excess proceeds from the sale of the I-277 land parcels will not be available until late FY2016 or early FY2017, after land sale proceeds are first used to retire the outstanding Bank of America and Wells Fargo loan.

Non Departmental Budgets

106. What over-street walkways are maintained by the City? (May 6th Budget Workshop)

The FY2016 Recommended non-departmental line item budget of \$188,149 for Maintenance of Public Spaces provides funding for maintenance of buildings and other City facilities not assigned to a specific City department. Within this \$188,149 budget, \$26,674 (14.2%) is allocated to the maintenance of the following over-street walkways:

- 100 Block, East 3rd Street
- 100 Block, East 4th Street
- 100 Block, East 5th Street
- 200 Block, South College Street

The City has provided maintenance on these over-street walkways because they are within the public right-of-way and they connect buildings with different owners. The building

owners have not maintained these walkways. Walkways that connect on both ends to buildings owned by the same company are maintained by that owner.

107. *What would be the annual operating cost of converting street lights to LED lights? (May 6th Budget Workshop)*

Changing the City's approximately 75,000 street lights to Light-Emitting Diode (LED) technology is not a "one to one" conversion. LED lighting technology produces different lighting characteristics requiring additional evaluation. Until such an evaluation is conducted, it is hard to precisely determine the cost implications. However, based on assumptions about the choices the City could make given Duke Energy's current rate structures, staff estimates a broad range from a savings of up to \$120,000 per year to cost of an additional \$160,000 per year. The difference in operating costs depends on brightness of the City's LED street light fixture; the brighter the LED, the more expensive to operate.

A wholesale Street lighting change out is not an option available to municipalities under the current rate structure as approved by the NC Utilities Commission.

108. *Provide an explanation of the \$200,000 allocated to third party grants. (May 6th Budget Workshop)*

The \$200,000 contribution and grant amount allows the City Manager the flexibility to not bring small amounts of grant funding or contributions through the Council's agenda process. North Carolina General Statutes requires municipalities to bring any increase to a Fund Budget to their corresponding Governing Board for approval. This allocation supplies a funding source to allow the City to accept small grant and contribution amounts without requiring Council approval. If this amount was reduced or eliminated the impact would be more Council agenda items related to grants and contributions.

Financial Policies & Practices

109. *What is the history of the 16% fund balance policy and what would be the process to amend that policy? (April 8th Budget Workshop)*

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.



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
Subject: Response to Questions provided by the City of Charlotte, Budget Committee

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 18th 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 3rd 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 1st three months Pearson completed just under 11,000 parcels. In the 4th 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	\$ 91,591.6	\$ 89,604.3	\$ -1,987.3	-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

The reduction in business personal property was the result of the new legislative initiative to exempt business software from property tax. The banking industry was a major beneficiary as the large impact has been felt in only two counties, Mecklenburg (Bank of America / Wells Fargo) and Forsyth (BB&T). At the time of the FY 2015 forecast, this impact was not known.

Public Assessments (State) - \$365.5 million decline

This difference is due to the timing of the joint Airline appeal of their \$519 million property tax appraisals with the State. The Mecklenburg County Tax office was prevented from issuing the 2014 tax bills while the appeal was outstanding. However, in March the State Department of Revenue approved the issuance of the delinquent tax bills and they have now been sent. However, because of the timing, the positive assessment impact for two years (\$1.039 billion) was reflected in Charlotte's FY 2016 Assessed Value budget projection rather than the FY 2015 final forecast.

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

Highest Annual Growth %	Average Annual Growth %	Lowest Annual Growth %	Highest Annual Growth \$\$	Average Annual Growth \$\$	Lowest Annual Growth \$\$	Highest Gross Base	Lowest Gross Base	Average Gross Base	
(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	
<div style="display: flex; justify-content: space-between;"> <div style="width: 20%;"> <p>Jurisdiction2</p> <ul style="list-style-type: none"> Towns Fire Districts Meck City Special Districts </div> <div style="width: 20%;"> <p>Jurisdiction</p> <ul style="list-style-type: none"> Charlotte Cornelius Davidson Huntersville Matthews Meck Police </div> <div style="width: 20%;"> <p>Prop Type</p> <ul style="list-style-type: none"> BUS IND Prior Yr BUS Au... PUB REI RMV </div> </div>									
Values									
Jurisdiction	Prop Type	2013 Tax Value	Highest 2014 Est.	Average 2014 Est.	Lowest 2014 Est.	\$ Growth (Highest)	% Growth (Highest)	\$ Growth (Average)	% Growth (Average)
- Charlotte	BUS	7,846,129,133	8,391,663,625	8,253,131,620	8,114,579,616	543,554,492	6.9%	-405,002,487	5.2%
	IND	56,997,232	60,882,669	58,141,988	55,401,308	3,885,437	6.8%	1,144,756	2.0%
	PUB	2,177,901,362	2,287,963,014	2,266,507,682	2,245,052,351	110,061,652	5.1%	88,606,320	4.1%
	RMV	6,019,214,990	6,005,972,717	6,005,972,717	6,005,972,717	(13,242,273)	-0.2%	(13,242,273)	-0.2%
	REI	73,637,906,124	75,686,343,803	74,022,063,880	73,044,223,437	2,048,437,679	2.8%	384,157,756	0.5%
	Prior Yr BUS Audit Discoveries	888,570,351	985,731,675	985,731,675	985,731,675	87,161,324	9.7%	87,161,324	9.7%
Charlotte Total		90,638,719,192	93,418,577,502	91,591,549,562	90,450,961,103	2,779,858,311	3.1%	952,830,371	1.1%
Grand Total		93,418,577,502	90,450,961,103	91,591,549,562	90,450,961,103	2,779,858,311	3.1%	952,830,371	1.1%

March 6th 2015

Jurisdiction2	Prop Type	2014 Tax Value	Average 2015 Est.	Avg. Growth %
(All)	(All)	7,891,735,782	7,958,159,103	0.8%
	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%
CHARLOTTE Total		89,604,350,473	91,823,112,998	2.5%

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	WELLESLEY VILLAGE	Residential	Acceptable
A514	MAGNOLIA ESTATES	Residential	Acceptable
A515	CORNELIUS	Residential	Acceptable
A516	OAKHURST II	Residential	Minor Issues

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

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

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

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

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 MECKLEN	Residential	Acceptable
CR13	CONDO, RESIDENTIAL - NORTH MECKLEN	Residential	Acceptable
CR14	CONDO, RESIDENTIAL - NORTH MECKLEN	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 - AVERAGE	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

CR45	CONDO, RESIDENTIAL - DOWNTOWN - EX	Residential	Acceptable
CR46	CONDO, RESIDENTIAL - DOWNTOWN - CU	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 - AV	Residential	Acceptable
CR83	CONDO, RESIDENTIAL - SOUTHWEST - G	Residential	Acceptable
CR92	CONDO, RESIDENTIAL - SOUTH MECKLEN	Residential	Acceptable
CR93	CONDO, RESIDENTIAL - SOUTH MECKLEN	Residential	Acceptable
CR94	CONDO, RESIDENTIAL - SOUTH MECKLEN	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

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

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 / GLENN	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

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

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

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

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 COMMONS\CALDWELL 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

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

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

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

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

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 GOV	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

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	ABBEY 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

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 / COLC	Residential	Major Issues
U501	WESTINGHOUSE BV AREA	Residential	Minor Issues

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

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

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

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 COU	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

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	W1LLIAMSBURG 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

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

Feb. 27, 2014 – District 5 Town Hall Presented by Commissioner Matthew Ridenhour

May 7, 2014 – County Manager Dena R. Diorio at Senior Center on Tyvola Road

May 13, 2014 – County Manager Dena R. Diorio at Tuesday Morning Forum

May 14, 2014 – County Manager Dena R. Diorio at League of Women Voters

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

Attachment 4

Project Title	Project Type	FY16	FY17	FY18	FY19	FY20	Total 5-YR CIP	Category
Steele Creek LS Replacement	Sewer	\$4,000,000	\$0	\$0	\$0	\$0	\$4,000,000	Capacity for Growth
McDowell Basin Trunk Sewers	Sewer	\$3,000,000	\$0	\$17,000,000	\$0	\$0	\$20,000,000	Capacity for Growth
Clems Branch Pump Station Improvements	Sewer	\$3,000,000	\$0	\$0	\$0	\$0	\$3,000,000	Capacity for Growth
Vest FM & Pump Station to Franklin	Water	\$2,030,000	\$0	\$0	\$0	\$0	\$2,030,000	Regulatory Requirements
Coffey and Taggart Creek Outfall	Sewer	\$1,000,000	\$0	\$0	\$0	\$0	\$1,000,000	Capacity for Growth
Wm-Tyvola Road West	Water	\$1,000,000	\$0	\$0	\$0	\$0	\$1,000,000	Capacity for Growth
Sugar Creek WWTP - Phase II	Sewer	\$0	\$17,000,000	\$0	\$0	\$0	\$17,000,000	Rehabilitation and Replacement
Dixie Berryhill Sewer Projects	Sewer	\$0	\$5,540,000	\$0	\$0	\$0	\$5,540,000	Commitment to Public Projects and Utility Operations
McAlpine Creek WWMF Final Clarifier	Sewer	\$0	\$5,100,000	\$0	\$0	\$0	\$5,100,000	Capacity for Growth
Gum Branch Outfall Replacement	Sewer	\$0	\$3,000,000	\$0	\$0	\$0	\$3,000,000	Capacity for Growth
Upper McAlpine Creek Relief Sewer	Sewer	\$0	\$1,000,000	\$0	\$3,500,000	\$0	\$4,500,000	Capacity for Growth
Dixie Berryhill Water Projects	Water	\$0	\$5,400,000	\$0	\$0	\$0	\$5,400,000	Commitment to Public Projects and Utility Operations
Dewatering Complex Upgrade at McAlpine	Sewer	\$0	\$440,000	\$2,970,000	\$0	\$0	\$3,410,000	Regulatory Requirements
Mallard Creek WRF Generator Project	Sewer	\$0	\$0	\$8,500,000	\$0	\$0	\$8,500,000	Commitment to Public Projects and Utility Operations
Thermal Hydrolysis System at McAlpine	Sewer	\$0	\$0	\$7,710,000	\$49,400,000	\$0	\$57,110,000	Regulatory Requirements
McMullen Creek Parallel Sewer and Flow EQ	Sewer	\$0	\$0	\$7,000,000	\$0	\$0	\$7,000,000	Capacity for Growth
PS & WAS Pipelines from Irvin to McAlpine	Sewer	\$0	\$0	\$0	\$1,800,000	\$0	\$1,800,000	Regulatory Requirements
Independence Blvd. Widening - Water and Sewer	Water	\$0	\$0	\$10,000,000	\$0	\$0	\$10,000,000	Commitment to Public Projects and Utility Operations
Goose Creek PS and Outfall	Sewer	\$0	\$0	\$0	\$0	\$3,000,000	\$3,000,000	Capacity for Growth
978' North-South Transmission Main (formerly Hwy. 21 WM)	Water	\$0	\$0	\$8,000,000	\$0	\$0	\$8,000,000	Capacity for Growth
North Fork of Crooked Creek Trunk Sewer	Sewer	\$0	\$0	\$0	\$0	\$2,700,000	\$2,700,000	Capacity for Growth
WM - Freedom / Tuckaseegee Rd. Replacement	Water	\$0	\$0	\$7,200,000	\$0	\$0	\$7,200,000	Capacity for Growth
McKee Creek Tributary - Larkhaven GC Trunk Sewer	Sewer	\$0	\$0	\$0	\$0	\$2,500,000	\$2,500,000	Capacity for Growth
978 Booster Pump Station	Water	\$0	\$0	\$5,000,000	\$0	\$0	\$5,000,000	Capacity for Growth
Campus Ridge Rd. Lift Station, Force Main, & Gravity Sewer	Sewer	\$0	\$0	\$0	\$0	\$2,500,000	\$2,500,000	Capacity for Growth
North Tryon Transmission Main	Water	\$0	\$0	\$2,000,000	\$0	\$0	\$2,000,000	Capacity for Growth
Dixon Branch Trunk Sewer Extension	Sewer	\$0	\$0	\$0	\$0	\$1,600,000	\$1,600,000	Capacity for Growth
Plaza BPS Intake Transmission Main -NEWT Extension	Water	\$0	\$0	\$1,250,000	\$0	\$0	\$1,250,000	Capacity for Growth
Fuda Creek Trunk Sewer	Sewer	\$0	\$0	\$0	\$0	\$1,550,000	\$1,550,000	Capacity for Growth
Franklin Dewatered Residuals Storage Facility	Water	\$0	\$0	\$660,000	\$4,470,000	\$0	\$5,130,000	Regulatory Requirements
McCullough Branch LS Improvements	Sewer	\$0	\$0	\$0	\$0	\$1,500,000	\$1,500,000	Capacity for Growth
Plaza Rd. BPS to W.T. Harris TM	Water	\$0	\$0	\$500,000	\$0	\$0	\$500,000	Capacity for Growth
Beaver Dam Creek West Branch Outfall	Sewer	\$0	\$0	\$0	\$0	\$1,300,000	\$1,300,000	Capacity for Growth
Catawba Raw Water Pump Station Cell 1 Rehabilitation *	Water	\$0	\$0	\$200,000	\$1,000,000	\$8,500,000	\$9,700,000	Rehabilitation and Replacement
Upper Clear Creek Tributary Sewer	Sewer	\$0	\$0	\$0	\$0	\$1,000,000	\$1,000,000	Capacity for Growth
Lee S. Dukes WTP/Stumptown Rd. Transmission Main	Water	\$0	\$0	\$0	\$3,650,000	\$0	\$3,650,000	Capacity for Growth
Cane Creek Southeast Tributary Trunk Sewer	Sewer	\$0	\$0	\$0	\$0	\$700,000	\$700,000	Capacity for Growth
Gibbon / Nevin to Mallard Tank Transmission Main	Water	\$0	\$0	\$0	\$3,000,000	\$0	\$3,000,000	Capacity for Growth
Lake Road Trunk Sewer	Sewer	\$0	\$0	\$0	\$0	\$625,000	\$625,000	Capacity for Growth
Camp Stewart and Rocky River Church Rd 12" Water Main	Water	\$0	\$0	\$0	\$1,500,000	\$0	\$1,500,000	Capacity for Growth
Mountain Island Tributary Extension	Sewer	\$0	\$0	\$0	\$0	\$510,000	\$510,000	Capacity for Growth
Catawba River Water Pump Station Cell 4 – Pump Addition *	Water	\$0	\$0	\$0	\$200,000	\$1,200,000	\$1,400,000	Capacity for Growth
Cane Creek Trunk Sewer *	Sewer	\$0	\$0	\$0	\$0	\$450,000	\$450,000	Capacity for Growth
Verhoeff Drive Water Main *	Water	\$0	\$0	\$0	\$0	\$1,300,000	\$1,300,000	Capacity for Growth
Hambright Road Water Main *	Water	\$0	\$0	\$0	\$0	\$1,000,000	\$1,000,000	Capacity for Growth
Diesel Generators for BPS	Water	\$0	\$0	\$0	\$0	\$500,000	\$500,000	Rehabilitation and Replacement
Duke Dewatering Building and Residuals Storage Facility	Water	\$0	\$0	\$0	\$0	\$470,000	\$470,000	Regulatory Requirements
Catawba River Water Pump Station New Generator *	Water	\$0	\$0	\$0	\$0	\$450,000	\$450,000	Commitment to Public Projects and Utility Operations
Dukes Water Treatment Plant – Backwash Recycle Pump Station *	Water	\$0	\$0	\$0	\$0	\$250,000	\$250,000	Commitment to Public Projects and Utility Operations
Total Year		\$14,030,000	\$37,480,000	\$77,990,000	\$68,520,000	\$33,605,000	\$231,625,000	

City of Charlotte - Arts & Cultural Funding

Fiscal Year	Financial Partner Contributions to ASC	Operating Maintenance to City Owned Facilities*	Capital Maintenance to City Owned Facilities*	Bond Payments for City Owned Facilities*	Public Art Allocations (General and Enterprise Funds)**	Total	Annual ASC Employee Campaign Contributions	Total Cultural Sector Spending + Employee Campaign	City Population***	City Per Capita Cultural Spending (Does Not Include Employee Contributions)
2005	\$2,942,000	\$2,222,918	\$1,450,000	\$2,379,424	\$963,161	\$9,957,503	\$123,055	\$10,080,558	631,160	\$16
2006	\$2,942,000	\$2,118,621	\$456,794	\$1,984,956	\$860,600	\$8,362,971	\$131,456	\$8,494,427	652,202	\$13
2007	\$2,942,000	\$2,131,670	\$456,794	\$1,924,118	\$1,193,950	\$8,648,532	\$140,820	\$8,789,352	669,690	\$13
2008	\$2,942,000	\$2,287,568	\$456,794 (a)	\$1,867,455	\$499,443	\$8,053,260	\$136,187	\$8,189,447	687,971	\$12
2009	\$2,942,000	\$2,296,229	\$456,794	\$1,806,455	\$139,420	\$7,640,898	\$140,083	\$7,780,981	704,422	\$11
2010	\$2,883,160	\$2,641,751	\$456,794	\$2,664,933	\$608,515	\$9,255,153	\$140,820	\$9,395,973	738,710	\$13
2011	\$2,883,160	\$2,457,721	\$605,091	\$4,058,571	\$534,040	\$10,538,583	\$152,740	\$10,691,323	755,928	\$14
2012	\$2,883,160	\$2,194,641	\$605,091 (b)	\$6,619,218	\$547,461	\$12,849,571	\$153,914	\$13,003,485	774,422	\$17
2013	\$2,940,823	\$1,860,078	\$605,091	\$6,270,563	\$1,346,036	\$13,022,591	\$131,782	\$13,154,373	792,862	\$16
2014	\$2,940,823	\$1,883,928	\$800,000	\$6,270,563	\$2,097,667	\$13,992,981	\$138,806	\$14,131,787	792,862	\$18
Total	\$29,241,126	\$22,095,125	\$6,349,241	\$35,846,256	\$8,790,293	\$88,329,060	\$1,250,857	\$89,579,917		

Mecklenburg County - Arts & Cultural Funding

Fiscal Year	Financial Partner Contributions to ASC****	Operating Maintenance to Spirit Square	Capital Maintenance to City Owned Facilities	Bond Payments for City Owned Facilities	Public Art Allocations (General and Enterprise Funds)	Total	Annual ASC Employee Campaign Contributions	Total Cultural Sector Spending + Employee Campaign	County Population***	County Per Capita Cultural Spending (Does Not Include Employee Contributions)
2005	\$458,724	\$1,364,299	\$0	\$0	not available	\$1,823,023	\$82,378	\$1,905,401	800,486	\$0.44
2006	\$458,724	\$1,441,227	\$0	\$0	\$939,777	\$2,839,728	\$86,071	\$2,925,799	833,791	\$0.29
2007	\$458,723	\$1,441,277	\$0	\$0	\$757,747	\$2,657,747	\$99,044	\$2,756,791	865,573	\$0.33
2008	\$475,000	\$1,441,277	\$0	\$0	\$263,948	\$2,180,225	\$108,555	\$2,180,225	892,456	\$0.41
2009	\$475,000	\$1,484,516	\$0	\$0	not available	\$1,959,516	\$125,006	\$2,084,522	913,639	\$0.47
2010	\$428,000	\$1,419,808	\$0	\$0	not available	\$1,847,808	\$17,725	\$1,865,533	923,254	\$0.50
2011	\$75,000	\$825,000	\$2,948,000	\$0	not available	\$3,848,000	\$12,322	\$3,860,322	944,770	\$0.25
2012	\$350,000	\$750,000	\$2,948,000	\$0	not available	\$4,048,000	\$12,919	\$4,060,919	967,971	\$0.24
2013	\$350,000	\$750,000	\$2,948,000	\$0	not available	\$4,048,000	\$9,740	\$4,048,000	990,977	\$0.24
2014	\$350,000	\$750,000	\$2,948,000	\$0	\$691,200	\$4,739,200	\$6,930	\$4,746,130	990,977	\$0.21
Total	\$4,424,417	\$13,031,703	\$11,792,000	\$0	\$2,652,672	\$29,991,247	\$560,690	\$30,433,642		

"Not Available" = Mecklenburg County Public Art allocation information was not available in FY2005 and from FY2009 - FY2013

(a) \$2,283,968 in Capital Maintenance to City Owned Facilities was expended between July 1, 2005 (FY2006) and June 30, 2010 (FY2010)
Amounts shown above for FY06 - FY10 reflect the 5-year average annual spread of this \$2,283,968

(b) \$1,815,274 in Capital Maintenance to City Owned Facilities was expended between July 1, 2010 (FY2011) and June 10, 2013 (FY2013)
Amounts shown above for FY2011 - FY2013 reflect the 3-year average annual spread of this \$1,815,274

*Facilities Include: Discovery Place, Mint Museum - Uptown, Mint Museum - Randolph, Blumenthal Performing Arts Center, Knight Theater
Gantt Center, Bechtler Museum of Modern Art, Spirit Square (transferred to County in FY2009)

Facilities Operating Maintenance Examples: HVAC Repair, Plumbing, Interior/Exterior Finishes, Life-Safety Equipment

Facilities Capital Maintenance Examples: Roof, Chillers, Parking Deck, Electrical Systems

\$800,000 is programmed for restroom renovations in the Blumenthal Performing Arts Center in FY2014

\$800,000 is programmed to replace seats in the Blumenthal Performing Arts Center in FY2015

**City Public Art allocations include available numbers for General Fund, Aviation, Art-in-Transit, and Utilities

***2014 Census Data is not currently available from the US Census Bureau

****Education funding for the ASC- National Center for Arts and Technology

ESTIMATED DEVELOPMENT POTENTIAL AROUND CITYLYNX GOLD LINE PHASE 1 AND 2 TRANSIT STATIONS

Exhibit 28

Development Opportunities Along the Western Portion of the Gold Line Corridor



New Development Summary (4 Stations Combined)

	Total New Units/ SF	Total Population	Total Employment	Total Acres	Value of Dev (less land)	Incremental Value
Residential	573	1,002		22.5	\$111,302,341	<i>Includes values of new development and appreciation of existing land and development.</i>
Office	63,828		319	5.9	\$11,472,986	
Retail	527,266		1,055	7.0	\$13,026,722	
Flex	0		0	0.0	\$0	
Summary		1,002	1,374	35.3	\$135,802,049	\$218,866,711

The western portion of the Gold Line Small Starts corridor has seen the least amount of development pressure thus far and will likely continue to see moderate development potential going forward. More than 154 acres are available for development or redevelopment, with the majority of these acres likely being developed as rental apartments or perhaps for-sale townhouses. Smaller opportunities exist for local-serving office uses (perhaps some type of JCSU-related office) as well as neighborhood-serving retail.

Note: Values provided above utilized NCG per SF estimates from 2013 and have not been updated, other than factoring in inflation. Similarly, incremental value includes an assumption relative to base value at YE 2010. No effort has been made to update those numbers.

SOURCE: Noell Consulting Group



ESTIMATED DEVELOPMENT POTENTIAL AROUND CITYLYNX GOLD LINE PHASE 1 AND 2 TRANSIT STATIONS

Exhibit 31
Development Opportunities Along the Central Portion of the Gold Line Corridor



New Development Summary (5 Stations Combined)

	Total New Units/ SF	Total Population	Total Employment	Total Acres	Value of Dev (less land)	Incremental Value
Residential	4,944	8,652		32.4	\$1,104,720,849	<i>Includes values of new development and appreciation of existing land and development.</i>
Office	4,298,087		21,490	19.7	\$1,088,385,925	
Retail	208,539		417	4.8	\$43,901,527	
Flex	0		0	0.0	\$0	
Summary		8,652	21,908	57.0	\$2,237,008,301	\$3,857,712,166

More than 90 acres of undeveloped or vacant acres exists within one-quarter mile of the five Central Corridor stations. We believe this land will develop with a strong mix of residential (particularly around the BB&T stadium and Romare Bearden Park) and around the Johnson & Wales station area, as well as high-rise office around Gateway Station and the Tryon and Arena/Transportation Stations. All retail development in this area is assumed to be developed as first floor retail uses, given high land costs and smaller parcels in the area.

Note: Values provided above utilized NCG per SF estimates from 2014 and have not been updated, other than factoring in inflation. Similarly, incremental value includes an assumption relative to base value at YE 2010. No effort has been made to update those numbers.

SOURCE: Noell Consulting Group



ESTIMATED DEVELOPMENT POTENTIAL AROUND CITYLYNX GOLD LINE PHASE 1 AND 2 TRANSIT STATIONS

Exhibit 37

Development Opportunities Along the Eastern Portion of the Gold Line Small Starts Corridor



New Development Summary (2 Stations Combined)

	Total New Units/ SF	Total Population	Total Employment	Total Acres	Value of Dev (less land)	Incremental Value
Residential	2,040	3,569		37.7	\$558,596,798	<i>Includes values of new development and appreciation of existing land and development.</i>
Office	111,025		555	1.0	\$28,438,044	
Retail	131,816		264	6.1	\$35,286,483	
Flex	0		0	0.0	\$0	
Summary		3,569	819	44.7	\$622,321,325	\$739,520,681

More than 85 acres of vacant or undeveloped land is available for development in the eastern segment of the Small Starts portion of the Gold Line. Included in this are significant acreage in Plaza/Midwood likely to develop as residential and neighborhood-serving retail uses. The Hawthorne & 8th station area includes opportunities for higher intensity residential around the park, with opportunities existing for medical office, retail, and residential uses as well.

Note: Values provided above utilized NCG per SF estimates from 2014 and have not been updated, other than factoring in inflation. Similarly, incremental value includes an assumption relative to base value at YE 2010. No effort has been made to update those numbers.

SOURCE: Noell Consulting Group

