
FY 2020 Budget Workshop

City of Charlotte

**April 3, 2019 1:30 p.m.
Room 267**

I. Workshop Overview	Marcus Jones
II. General Employee Pay Practices	Sheila Simpson
III. Retirement Comparison	Ryan Bergman
IV. Healthcare and Other Benefits Comparison	Christina Fath
V. Financial Partners	
• General Financial Partners	Phil Reiger
• H&NS Financial Partners	Pamela Wideman

Distribution: Mayor and City Council
Marcus Jones, City Manager
City Manager's Executive Team
City Manager's Senior Leadership Team
Strategy & Budget Staff

***Questions and Answers
From February 6 and March 6
Budget Workshops***

Published on April 3, 2019

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Table of Contents

Section 1: Questions and Answers on Revaluation from February 6 Budget Workshop.....	1
Section 2: Questions and Answers on Capital Projects from February 6 Budget Workshop.....	23
Section 3: Questions and Answers from March 6 Budget Workshop	29

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Section 1:
Questions and Answers on Revaluation
From February 6 Budget Workshop

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Revaluation Analysis Update

At the February 6, 2019 City Council Budget Workshop, several questions were posed by Council members about the impact of revaluation on commercial properties and apartments. The following information describes the impacts of revaluation on commercial properties, including Apartment complexes.

Impact of Revaluation on Commercial Properties

A data file was received from Mecklenburg County with the previous (2018) and current (2019) value of all non-tax-exempt commercial properties in the County, with an indicator of which properties had changed value specifically due to the revaluation, and which had changed in value due to natural growth (typically, construction activity in 2018).

The Mecklenburg County Assessor's Office reported a median percent change in assessed value for all commercial properties in the City of Charlotte of 80 percent. For properties that changed in value specifically due to the revaluation (excluding natural growth and corrections in vacant land), the median percent change in assessed value is 56 percent. Modeled at an example revenue-neutral City tax rate of 35 cents, the median tax amount change would be \$192.

Percent Change in Assessed Value and City Tax Impact by Property Description

Property Description	Parcel Count	Median % Change in Assessed Value	Median Estimated City Tax Change
Commercial	2,575	43%	\$48
Government-Institution	42	50%	\$230
Hotel/Motel	178	84%	\$4,783
Manufactured	5	32%	-\$84
Multi-Family	1,071	118%	\$4,011
Office	3,964	43%	\$21
Single-Family	983	76%	\$132
Stadium/Arena	2	69%	\$46,713
Warehouse	3,521	66%	\$369
Warehouse Large	6	60%	\$2,905
All	12,347	56%	\$192

Note: See table on the next page for more detail on the types of properties captured within each of the categories.

Revaluation Analysis Update

Example Types of Buildings Within Each Property Description

Property Description	Examples
Commercial	Convenience stores, fast food, restaurants, retail, shopping strips, supermarkets
Government-Institution	Non-exempt church properties, private schools
Hotel/motel	Hotels, motels, extended stay, bed & breakfasts
Manufactured	Manufactured homes
Multi-Family	Apartments, elderly homes, nursing homes
Office	Banks, daycares, medical, mixed use, office condos
Single-family	Duplex-triplex developments, group homes
Stadium/Arena	Stadium, arena
Warehouse	Light manufacturing, service garage, warehouse
Warehouse Large	Light manufacturing-large, warehouse-large

Revaluation Analysis Update

Impact of Revaluation on Apartments

The City's Office of Data & Analytics conducted an analysis on a data file received from Mecklenburg County to estimate the impact of the revaluation (change in tax amount) for multi-family apartment complexes. The subset of apartments in this analysis includes:

- Properties that changed value specifically due to the revaluation (excludes natural growth);
- Properties with a Land Use Code of Multifamily and a property description of a type of Apartment or Duplex/Triplex; and
- Properties that could be matched to an apartment complex in the RealData apartment database.¹

The final analysis includes 372 apartment complexes totaling 84,346 units across the City of Charlotte. The tax amount change is modeled with the example revenue-neutral City tax rate of 35 cents.

Overall, the median percent change in assessed value for multi-family apartment complexes is 114 percent. The median annual City tax change by unit for all apartment properties is \$125. For apartment complexes that are considered Naturally Occurring Affordable Housing (NOAH)², the median annual City tax change by unit is \$131.

Median Percent Change in Assessed Value and Median Tax Change per Unit by Type of Apartment

Apartments	Count of Complexes	Sum of Units	Median Percent Change in Assessed Value by Complex	Median City Tax Change Per Unit, Annual
All	372	84,346	114%	\$125
Not NOAH	190	44,236	84%	\$108
NOAH	182	40,110	151%	\$131

¹ Each apartment complex may span multiple tax parcels. The tax parcels in the County parcel database were matched to apartment complexes in the RealData database using GIS software. When the number of units differed between the parcel data and the RealData, two scenarios applied: 1) When the difference was fewer than 20 units, the lesser of the two numbers was used (to conservatively estimate the per unit cost); and 2) When the difference was 20 units or greater, the complex was excluded from the analysis (N=4).

² The properties classified as large-scale NOAH are 15 years or older, have 50 or more units, and have an average rent less than or equal to \$1,203, per the revised rent standard for HOME funds. A required characteristic to define large-scale NOAH is generally good quality construction, although it may have some deferred maintenance, or the exterior and interior amenity packages may be dated and less than what is offered by high end properties.

Revaluation Analysis Update

The table below shows the distribution of estimated City tax change from the 10th to the 90th percentile. Despite the large percent change in the value of multi-family apartments, the estimated City tax impact for 90 percent of units is \$208 or less annually.

Annual City Tax Change per Unit		
Percentile	All	NOAH
10 th	\$30	\$74
25 th	\$81	\$101
50 th	\$125	\$131
75 th	\$165	\$167
90 th	\$208	\$199

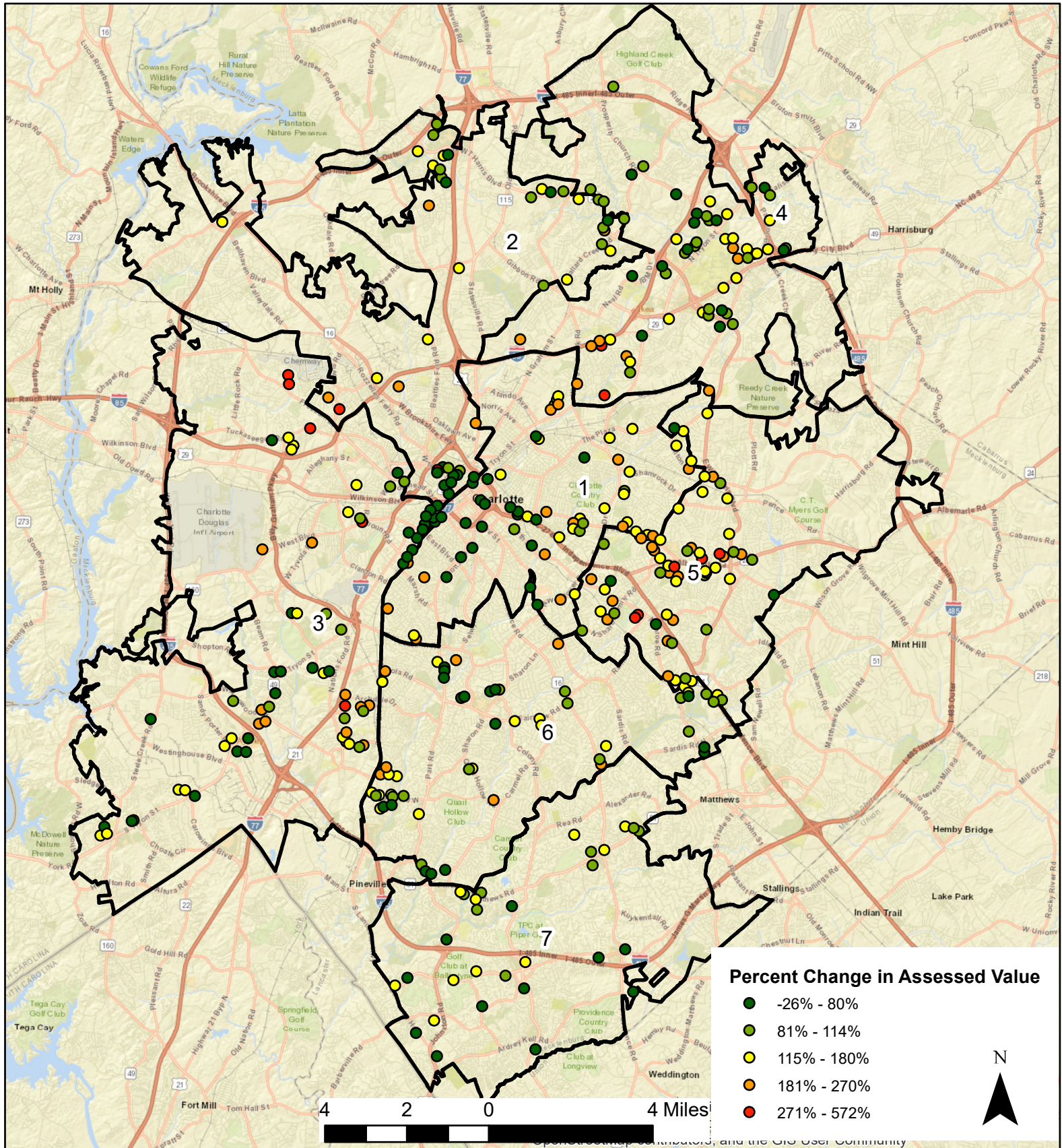
Apartments, assessed value and estimated tax change vary by geographic location. The table below shows the breakdown of units and median tax change by unit, by City Council District and type of apartment (NOAH and all apartments).

District	All Apartments			NOAH Apartments		
	Count	Sum of Units	Median City Tax Change per Unit, Annual	Count	Sum of Units	Median City Tax Change per Unit, Annual
1	56	9,469	\$107	27	4,953	\$128
2	44	10,761	\$129	14	3,645	\$160
3	71	16,861	\$100	28	5,910	\$160
4	58	13,786	\$115	26	6,124	\$115
5	61	11,475	\$129	49	9,508	\$137
6	54	13,455	\$131	30	7,870	\$131
7	28	8,539	\$146	8	2,100	\$135
City	372	84,346	\$125	182	40,110	\$131

The maps on the following pages show the spatial distribution of the revaluation impact on multi-family apartments.

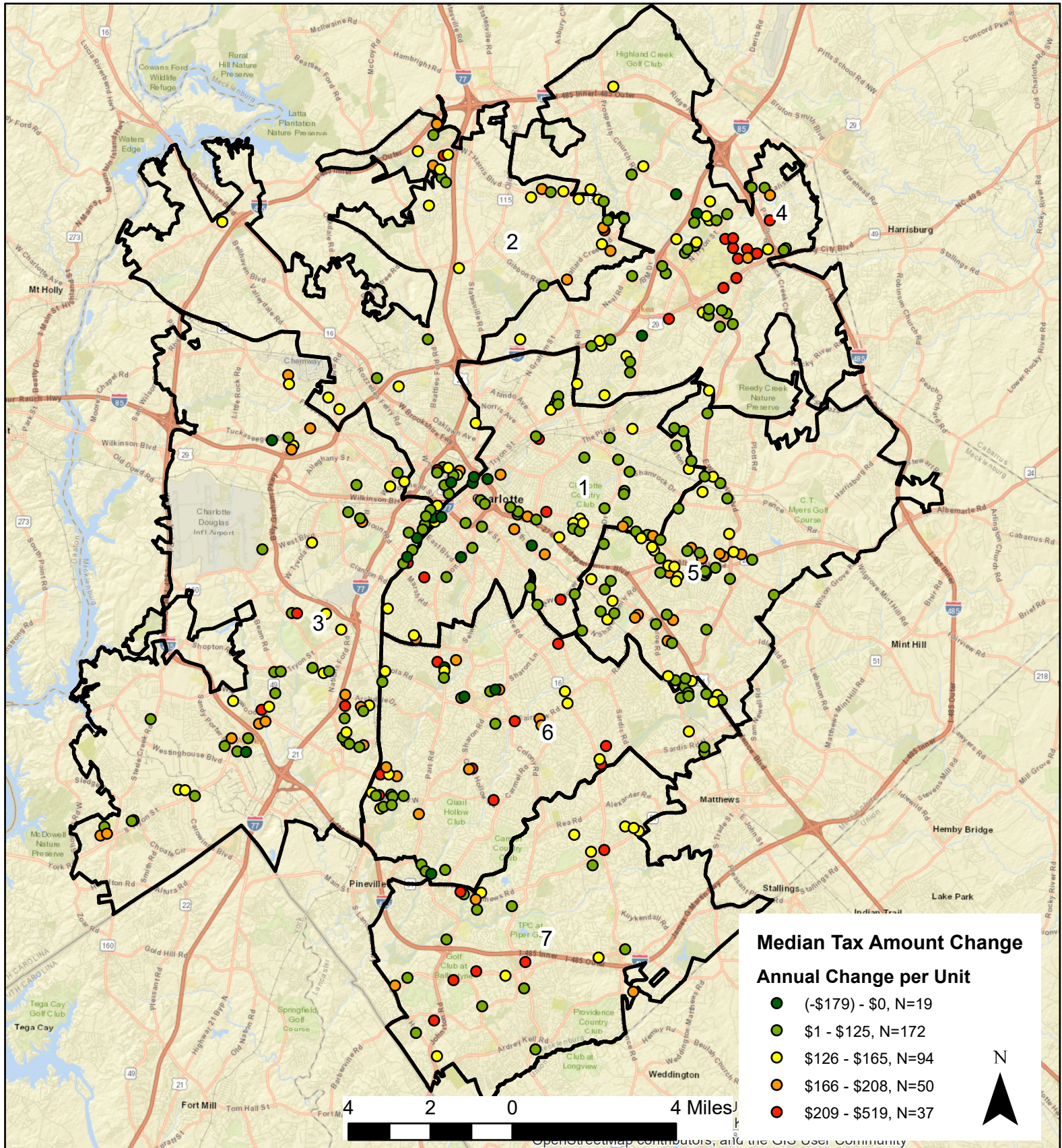
- Percent Change in Assessed Value
- Median Tax Impact – All Apartment Complexes
- Median Tax Impact – NOAH Apartment Complexes

Percent Change in Assessed Value (2018-2019) Multi-Family Apartments



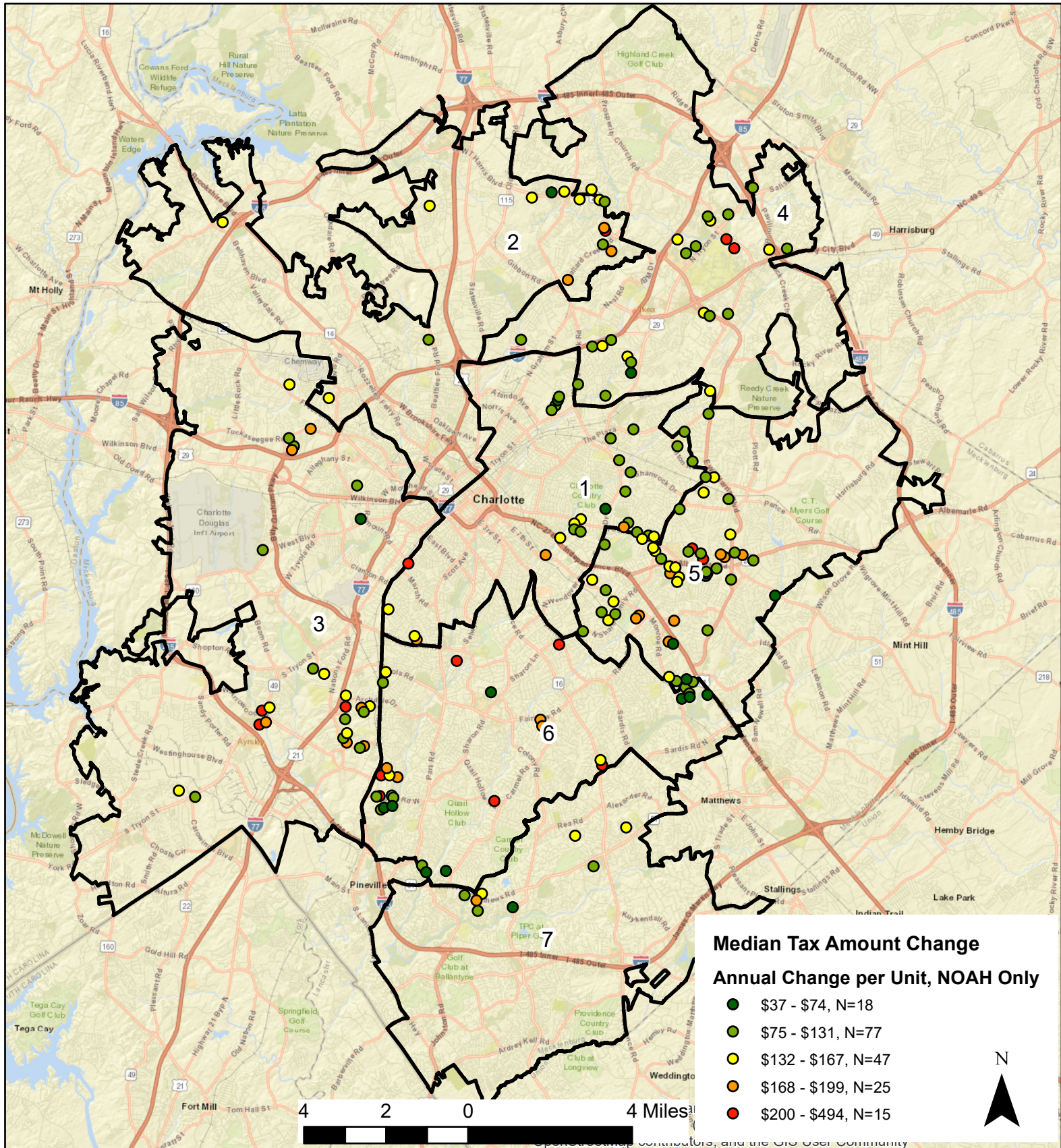
The 35 cent revenue neutral tax rate is an example based on preliminary estimates and is subject to change. The final FY 2020 tax rate will be set by the Charlotte City Council as part of the annual budget process.--This map is for guidance only.--

Median Change in Real Property City Tax Amount (2018-2019) Annual Change Per Unit by Apartment Complex Tax Rate Modeled at 35 Cents



The 35 cent revenue neutral tax rate is an example based on preliminary estimates and is subject to change. The final FY 2020 tax rate will be set by the Charlotte City Council as part of the annual budget process.--This map is for guidance only.--

Median Change in Real Property City Tax Amount (2018-2019) Annual Change Per Unit by Apartment Complex, NOAH Only Tax Rate Modeled at 35 Cents



The 35 cent revenue neutral tax rate is an example based on preliminary estimates and is subject to change. The final FY 2020 tax rate will be set by the Charlotte City Council as part of the annual budget process.--This map is for guidance only.--

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List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
1	Yes	Chateau	1600 Eastcrest Drive	1969	56	185%	\$10,060,700	\$494
1	Yes	Sedgefield	215 Poindexter Drive	1951	173	240%	\$16,939,900	\$286
1	Yes	Doral	524-A Bramlett Road	1967	132	226%	\$8,776,100	\$192
1	Yes	Peppertree	4335 Central Avenue	1985	292	235%	\$17,920,399	\$179
1	Yes	Charlotte Woods	1116 Scaleybark Road	1974	266	183%	\$16,725,400	\$172
1	Yes	Central Pointe	4933 Central Avenue	1972	336	245%	\$19,023,600	\$166
1	Yes	Wildwood	1022 Forest Oak Drive	1981	248	140%	\$15,064,300	\$153
1	Yes	Mountcrest	1719 Eastcrest Drive	1966	124	191%	\$6,619,400	\$148
1	Yes	Vista Commons	2728 Commonwealth Avenue	1986	132	148%	\$7,500,500	\$146
1	Yes	Southgate	4001 Conway Avenue	1962	310	194%	\$16,117,100	\$145
1	Yes	Soho On Central	3143 Central Avenue	1970	155	152%	\$7,912,100	\$132
1	Yes	Highland Trace	1131 Glenfiddich Drive	1989	90	170%	\$4,310,201	\$128
1	Yes	Edge At Noda	229 Hilo Drive	1972	208	251%	\$9,023,000	\$128
1	Yes	Links At Citiside	5005 Community Circle	2002	276	128%	\$13,813,900	\$121
1	Yes	Windsor Harbor	3217 Shamrock Drive	1971	176	161%	\$7,647,200	\$115
1	Yes	Kilborne	2900 Kilborne Drive	1968	90	166%	\$3,736,200	\$111
1	Yes	Aurora (Briar Creek)	1431-G Briar Creek Drive	1996	66	105%	\$3,295,500	\$109
1	Yes	Darby Terrace	4501 Central Avenue	1962	62	153%	\$2,585,700	\$108
1	Yes	Eastland Village	4016 Rosehaven Drive	1971	98	155%	\$3,756,600	\$100
1	Yes	English Garden	500 Craighead Road	1966	120	153%	\$4,432,800	\$96
1	Yes	Shamrock Gardens	3779 Michigan Avenue	1965	279	198%	\$9,285,990	\$93
1	Yes	Aurora	1425 Eastcrest Drive	1963	276	163%	\$9,318,000	\$89
1	Yes	Hillrock Estates	3317 Magnolia Hill Drive	1988	341	105%	\$13,082,500	\$83
1	Yes	Park Creek	1951 Milton Road	1967	231	148%	\$7,482,900	\$83
1	Yes	Cedar Greene	3720 Frew Road	1970	224	126%	\$7,361,700	\$79
1	Yes	English Garden Townhomes	431 Craighead Road, West	1973	66	107%	\$2,148,200	\$72
1	Yes	Block Apartments, The	2700 Eastway Drive	1969	126	136%	\$2,108,200	\$41
1		Midwood Station	2027 Central Avenue	2018	97	237%	\$12,214,900	\$367
1		Highland Mill Lofts	2901 N. Davidson Street	2004	166	146%	\$16,387,000	\$252
1		Wendover Walk	740 Wendover Road, North	1984	91	216%	\$7,012,900	\$220
1		Elmhurst	2723-F Dorchester Place	1967	160	199%	\$12,069,500	\$211
1		Edgeline Flats On Davidson	501 15Th Street, East	2013	36	124%	\$3,120,900	\$206
1		Shadowood	1719 Eastcrest Drive	1972	107	283%	\$6,450,200	\$181

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
1		Langston, The	1905 Seventh Street, East	2017	91	90%	\$8,349,000	\$179
1		Edison	1800 Commonwealth Avenue	2013	53	117%	\$3,953,100	\$173
1		Vyne On Central	3220 Central Ave, Apt.105	2008	98	102%	\$6,916,000	\$151
1		Woodfield Gardens	7113 Village Green Drive	1975	132	259%	\$6,101,040	\$137
1		Village Of Rosedale	3925 Tiffany Rose Place	2002	106	261%	\$4,248,200	\$119
1		Slope	2205 Kilborne Drive	1972	128	154%	\$5,762,100	\$117
1		Quarterside	820 Seventh Street, East Ste 118	2009	184	69%	\$14,330,700	\$117
1		Enclave	710 7Th Street, East	2008	85	61%	\$7,783,900	\$111
1		Sterling Magnolia	3720 Wendwood Lane #103	2004	174	74%	\$11,360,700	\$107
1		Elizabeth Square	730 Hawthorne Lane	2009	267	68%	\$18,350,400	\$100
1		Berkshire Dilworth	1351 Morehead Street, East	2016	296	54%	\$23,379,200	\$73
1		Presley Uptown	900 Stonewall Street, East	2016	230	54%	\$17,422,900	\$71
1		Metro 808	808 Hawthorne Lane	2011	237	52%	\$13,836,600	\$48
1		Julien	2142 Commonwealth Avenue	2016	105	46%	\$4,957,600	\$23
1		Yards At Noda	400 33Rd Street, East	2014	182	43%	\$11,287,800	\$16
1		Midtown 205	205 Kings Drive, South	2016	261	42%	\$15,393,400	\$12
1		Creekside	2000 Patio Court	1969	57	51%	\$745,600	\$10
1		Gibson, The	1000 Central Avenue	2016	250	42%	\$11,082,800	\$8
1		Salem Village I	1325 Corton Dr. #H	1972	60	40%	\$1,561,700	\$0
1		Camden Dilworth	1510 Scott Avenue	2006	145	38%	\$5,717,000	-\$8
1		Venue	2512 Weddington Avenue	2014	366	34%	\$18,341,200	-\$27
1		Alpha Mill	220 Alpha Mill Lane	2007	267	15%	\$2,253,400	-\$47
1		Tryon House	508 Tryon Street, North	1918	85	14%	\$672,200	-\$50
2	Yes	Elon At Mallard Creek	7916 Harris Hill Lane	1988	184	186%	\$15,592,400	\$234
2	Yes	Autumn Park	1801 Interface Lane	1996	586	142%	\$44,660,800	\$192
2	Yes	Elon At Mallard Creek Ph2	2305 New England Street	1997	288	114%	\$23,507,400	\$186
2	Yes	Grayson	6001 Bennettsville Lane	1999	240	138%	\$17,467,600	\$181
2	Yes	Brookstone	3800 Drybrook Road	1996	226	116%	\$15,760,000	\$161
2	Yes	Oaks	4915 Misty Oaks Drive	1996	318	107%	\$23,066,800	\$160
2	Yes	Northlake	8215 Crescent Ridge Drive	1990	216	110%	\$15,237,300	\$158
2	Yes	Trinity Park	9609 Trinity Road	1969	104	220%	\$5,250,500	\$145
2	Yes	Waterford Hills	6219 Waterford Hills Drive	1995	270	107%	\$17,737,400	\$145
2	Yes	East Coast	1120 C Marble Street	1972	102	243%	\$4,861,900	\$140

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
2	Yes	Alta Grove	10017 Season Grove Lane	2000	240	130%	\$13,439,500	\$136
2	Yes	Lodge At Mallard Creek	7815 Chelsea Jade Lane	1999	264	97%	\$16,052,600	\$126
2	Yes	Royal Orleans	1924-A Mcallister Drive	1966	181	128%	\$7,995,300	\$107
2	Yes	Addison Park	6225 Hackberry Creek Trail	1999	426	64%	\$20,569,500	\$64
2		Ten 05 West Trade	1005 West Trade Street	2003	190	289%	\$23,686,500	\$377
2		Perimeter Station	10051 Perimeter Station Drive	2009	203	125%	\$18,969,300	\$223
2		Cascades At Northlake	8700 Long Creek Club Drive	2009	306	125%	\$26,264,700	\$206
2		Wren Northlake	8524 Mason Andrew Way	2016	310	100%	\$29,729,900	\$202
2		Hamptons	8415 University Station Circle	1996	180	129%	\$13,405,400	\$181
2		Uptown Gardens	517 8Th Street, West	1986	120	91%	\$10,186,400	\$168
2		Residences At Braemar	8010 Woodsedge Drive	2004	160	116%	\$11,392,000	\$164
2		Ravenwood Hills	903-M Lynn Street	1972	120	466%	\$5,960,400	\$159
2		Cedar Flats	225 Cedar Street, North	2016	82	82%	\$7,066,800	\$156
2		Ivy Hollow	4920 Tanager Park Drive	2005	228	135%	\$13,753,600	\$149
2		Loft One 35	135 Morehead Street, West	2015	298	69%	\$28,344,900	\$143
2		Cascades At Northlake	9840 Longview Club Lane	2012	264	89%	\$19,331,200	\$142
2		Bramar Gardens	3115 Southwest Blvd #7	1968	123	192%	\$5,961,100	\$135
2		Post Uptown Place	305 North Graham Street	2000	227	75%	\$17,810,000	\$129
2		Mcneel, The	1214 Kohler Avenue	2010	48	230%	\$2,134,700	\$129
2		Perimeter Lofts	9404 Perimeter Station Drive	2013	246	75%	\$19,065,900	\$127
2		Catalyst	255 Mlk Jr. Boulevard	2009	462	65%	\$41,810,400	\$123
2		Post Gateway Place	906 West 5Th Street	2000	224	79%	\$15,884,200	\$123
2		Nevin Place	3146 Baroda Lane	1999	55	110%	\$2,629,900	\$107
2		Colonial Grand @ Legacy Park	8810 Legacy Park Drive	2001	288	83%	\$16,704,600	\$106
2		Abberly Woods	5301 Roundstone Way	2003	492	82%	\$25,818,300	\$95
2		Thompson Place	3910 Thompson Street	1980	65	118%	\$2,620,200	\$94
2		Bexley Greenway	8230 Greenway Village Drive	2004	266	63%	\$13,338,300	\$65
2		Circa Uptown	360 Graham Street, South	2016	243	51%	\$18,284,400	\$57
2		Madison Square At Northlake	10015 Madison Square Place	2012	287	95%	\$6,308,800	\$45
2		Gateway West	902 Fourth Street, West	2014	280	48%	\$17,687,100	\$40
2		Residences At Brookline	8816 Aspinwall Drive	2015	320	51%	\$14,137,600	\$36
2		Camden Cotton Mills	520 West Fifth Street	2002	180	46%	\$10,503,700	\$30
2		Mint, The	427 Trade Street, West	2015	177	29%	\$8,432,700	-\$58

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
2		Skyhouse Uptown	640 Church Street, North	2015	672	10%	\$7,215,900	-\$114
3	Yes	Whitehall Estates	2400 Whitehall Estates Drive	1997	252	200%	\$21,686,800	\$241
3	Yes	Lexington Green	636 Archdale Drive	1972	128	298%	\$9,044,200	\$214
3	Yes	Coffey Creek	2208 Yager Creek Drive	1990	420	206%	\$29,593,300	\$199
3	Yes	Emerald Bay	5029 Cherrycrest Lane	1974	250	268%	\$16,097,700	\$192
3	Yes	Lake Arbor	4929 Tuckaseegee Road	1972	288	325%	\$17,638,400	\$188
3	Yes	Glen Haven	3117 Tacoma Street	1993	152	161%	\$10,782,200	\$187
3	Yes	Arrowood Crossing	2109 Arrowcreek Drive	1988	200	183%	\$13,078,600	\$179
3	Yes	Windgate Place	220 Branchview Drive	1974	196	246%	\$11,825,800	\$177
3	Yes	Arborgate	9056 Arborgate Drive	1983	152	205%	\$9,458,100	\$176
3	Yes	Highlands	639 Archdale Drive	1971	176	187%	\$10,535,700	\$165
3	Yes	Pointe	6530 Free Throw Court	1996	340	124%	\$23,434,500	\$164
3	Yes	Lake Mist	1120-A Lake Mist Drive	1984	144	197%	\$8,444,400	\$164
3	Yes	York Ridge	13001 York Ridge Drive	1990	240	136%	\$15,857,600	\$164
3	Yes	Brook Valley	640 Deanna Lane	1972	161	253%	\$8,746,400	\$160
3	Yes	Park Fairfax	108 Park Fairfax Drive	1971	137	297%	\$6,722,100	\$149
3	Yes	Colonial Village @ South Tryon	7601 Holliswood Court	2001	216	99%	\$13,700,500	\$134
3	Yes	Sunset Village	2930 Tacoma Street	1974	98	170%	\$4,717,700	\$129
3	Yes	Forestbrook	2903 Forest Brook Drive	1971	260	154%	\$11,440,923	\$114
3	Yes	Weyland	2814 Marlowe Avenue	1951	144	177%	\$5,821,300	\$110
3	Yes	Oak Park At Nations Ford	103 Dinadan Drive	1972	202	116%	\$9,069,800	\$103
3	Yes	Stonewall Jackson Homes	5751 Airport Drive	1941	85	260%	\$2,908,700	\$102
3	Yes	Vista Villas	6309 Montego Drive	1971	238	172%	\$8,238,000	\$93
3	Yes	Ashford Place	905 Pineville Point Avenue	2001	456	83%	\$23,060,600	\$92
3	Yes	Tyvola Centre	625 Cameron Walk Court	2000	404	75%	\$21,480,500	\$88
3	Yes	Landings At Farmhurst	711 Farmhurst Drive	1986	125	103%	\$4,827,700	\$83
3	Yes	River Crossing	8030 Sycamore Creek Drive	2002	132	84%	\$5,926,500	\$83
3	Yes	Park At Steele Creek	13301 Crescent Springs Drive	1997	264	76%	\$12,615,800	\$81
3	Yes	Lakewood Manor	2732 Watson Drive #1	1967	50	101%	\$1,343,100	\$57
3		Citypark View South	Piedmont Hills Place	2017	200	129%	\$23,128,600	\$280
3		1701 Cityview	1701 West Blvd	1967	163	373%	\$9,740,700	\$187
3		Stone Ridge	8940 Camden Creek Lane	2001	318	137%	\$23,826,100	\$186
3		Bexley Steeecroft (Cloisters)	10000 Cloisters Club Lane	2010	270	131%	\$19,085,900	\$172

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
3		Steele Creek South	13212 Winter Hazel Road	2007	456	114%	\$33,950,500	\$170
3		Colonial Place	1307 Springmont Lane	1974	136	360%	\$7,345,700	\$168
3		Century Parkside	605 Candler Lane	1998	300	107%	\$22,443,300	\$165
3		Asbury Flats	1698 Freedom Drive	2016	77	94%	\$6,145,100	\$161
3		Post South End	222 Bland Street, East	2009	360	78%	\$32,772,200	\$156
3		Harlowe, The	10900 Point South Drive	1986	192	125%	\$12,100,700	\$150
3		Tyvola Crossing	2909 Cross Roads Place	2005	100	232%	\$5,167,900	\$150
3		Courtney Ridge	920 Yorkmont Ridge Lane	2000	280	95%	\$20,034,200	\$146
3		Whitehall Parc	8024 Whitehall Executive Center Dr	2013	298	89%	\$21,542,900	\$140
3		Enclave At Rivergate	12400 Toscana Way	2009	216	87%	\$15,422,700	\$137
3		Morehead West	1932 Morehead Street, West	2014	211	85%	\$14,136,400	\$125
3		Arrowood Villas	8825 Mont Carmel Lane	2001	120	134%	\$5,973,700	\$123
3		Wesley Village	2715 Wet Stone Way	2010	301	71%	\$21,220,300	\$108
3		Citypark View	1710 Piedmont Hills Place	2014	284	74%	\$17,573,000	\$100
3		Bexley Steelescroft (Farms)	13900 Steelescroft Farm Ln	2008	336	75%	\$19,630,100	\$96
3		Kingspark	2425-A Kingspark Drive	1965	110	147%	\$3,882,400	\$90
3		Tryon Park At Rivergate	12620 Toscana Way	2014	202	66%	\$12,478,700	\$86
3		Camden South End	1205 South Tryon Street	2003	299	99%	\$12,055,187	\$84
3		1225 Church	1225 Church Street, South	2010	406	60%	\$27,203,500	\$81
3		Summerfield	2352 Township Road	1991	52	159%	\$1,593,600	\$81
3		Cottonwood Reserve	2325 Courtney Oaks Road	2004	352	79%	\$15,794,700	\$79
3		Ansley Falls	6310 Ansley Falls Drive	2010	274	65%	\$15,199,500	\$76
3		Hideaway Lake	1825 Carrington Oaks Drive	2003	274	62%	\$14,057,600	\$65
3		Camden Gallery	1750 Camden Road	2016	323	54%	\$21,078,300	\$61
3		Three 30 Five	335 Doggett Street	2013	164	54%	\$10,899,800	\$60
3		Colonial Grand @ Ayrley	9005 Lenox Pointe Drive	2008	449	59%	\$21,314,300	\$55
3		Preserve At Steele Creek	10830 Morgan Creek Drive	2008	240	79%	\$7,054,100	\$51
3		Park And Kingston	125 Park Avenue, West	2014	168	44%	\$8,542,300	\$18
3		Lofts At Charleston Row	2025 Ayrley Town Blvd	2012	230	69%	\$2,414,600	\$16
3		District Flats	1449 Church Street, South	2014	197	43%	\$10,520,400	\$13
3		Camden Southline	2300 South Boulevard	2015	266	42%	\$15,677,300	\$11
3		Colonial Reserve At South End	2720 South Blvd	2013	353	42%	\$17,034,200	\$10
3		Addison At South Tryon	7000 Modern Way	2014	321	42%	\$13,562,600	\$8

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
3		Gramercy Square At Ayrley	3201 Windshire Lane	2009	358	37%	\$12,306,900	-\$9
3		1100 South	1100 South Boulevard	2015	331	35%	\$15,570,400	-\$23
3		Ashton South End	125 Tremont Avenue, West	2009	310	35%	\$18,674,500	-\$28
3		Solis Southline	2520 South Boulevard	2017	300	33%	\$14,348,000	-\$35
3		Willow Oak Run	2908 Turning Oak Drive	2012	85	15%	\$565,900	-\$38
3		Mosaic South End	1321 Tryon Street, South	2010	269	20%	\$7,716,400	-\$102
4	Yes	Mallard Green	9800 Mary Alexander Road	1984	76	218%	\$6,840,800	\$258
4	Yes	Mallard Creek	420 Michelle Linnea Drive	1988	148	179%	\$12,209,700	\$225
4	Yes	Hudson Commons	9201 Glenwater Drive	1991	276	138%	\$17,880,300	\$161
4	Yes	Maple Run I	2003 Canterwood Drive	1970	103	240%	\$5,680,200	\$161
4	Yes	Magnolia Terrace	8301 Paces Oaks Blvd	1989	264	123%	\$17,837,400	\$160
4	Yes	Pavilion At Uc	10425 Wheatside Drive	1997	249	148%	\$14,816,700	\$153
4	Yes	Silverstone	1305 Hunter Oak Lane	1974	94	328%	\$4,656,700	\$152
4	Yes	Thornberry	9920 Brickleberry Lane	2000	288	107%	\$19,512,500	\$150
4	Yes	Radbourne Lake	3209 Westbury Lake Drive	1991	225	98%	\$14,709,600	\$136
4	Yes	Berkeley Place	500 Solano Drive	2001	368	93%	\$23,854,600	\$131
4	Yes	Sage Point	4333 Cinderella Road	1972	98	256%	\$4,325,100	\$131
4	Yes	Tryon Forest	411 Lambeth Drive	1970	169	282%	\$7,209,700	\$128
4	Yes	Tanglewood	3200 Dalecrest Drive	1970	96	204%	\$4,258,000	\$125
4	Yes	Lake At The University	9401 Grove Hill Drive	1997	302	91%	\$19,090,200	\$125
4	Yes	Harris Pond	8301 Harris Pond Lane	1986	170	104%	\$9,089,400	\$116
4	Yes	Hunters Pointe	1841 B Prospect Drive	1972	394	184%	\$16,535,400	\$115
4	Yes	Walden Court	9115 Olmsted Drive	1985	144	101%	\$7,743,700	\$115
4	Yes	Chancellor Park	8215 University Ridge	1996	340	92%	\$19,464,500	\$114
4	Yes	Piedmont At Ivy Meadow	1301 Ivy Meadow Drive	2001	372	87%	\$21,258,200	\$109
4	Yes	Crossroads Station	6940 Hidden Forest Drive	2002	108	142%	\$4,573,500	\$107
4	Yes	Grand Reserve At Pavilion	1801 Willow Haven Lane	2000	408	86%	\$22,676,100	\$105
4	Yes	Townes At University Pointe	336 Blackhawk Road	1971	428	160%	\$16,366,500	\$101
4	Yes	Hunt Club	100 Heritage Pointe Road	1987	300	134%	\$11,395,400	\$94
4	Yes	Wexford	1811 Wexford Meadows Lane	1995	142	104%	\$6,134,800	\$94
4	Yes	Sharon Pines	7000-8 Barrington Drive	1970	310	153%	\$9,623,400	\$81
4	Yes	Woodland Hollow	6205 Dove Tree Lane	1975	252	85%	\$7,173,200	\$53
4		University Crossings	9010 University City Blvd	2014	187	162%	\$36,669,200	\$519

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
4		Edge I & II	1300 Varsity Lane	1999	180	197%	\$31,483,800	\$489
4		University Village	9915 University Village Blvd	2007	168	166%	\$28,106,000	\$446
4		49 North	10035 Dabney Drive	1998	130	167%	\$21,627,100	\$444
4		University Walk	1205 University Walk Circle	2002	120	134%	\$19,695,000	\$405
4		Millennium One	Thomas Combs Drive	2014	224	133%	\$34,361,000	\$377
4		901 Place	901 Forty-Niner Avenue	2000	158	160%	\$21,355,800	\$356
4		Arcadia	707 Sanctuary Place	2014	202	129%	\$29,102,800	\$350
4		Flats At Mallard Creek	11015 Education Way	2010	131	160%	\$14,991,300	\$301
4		Flats At Campus Pointe	1201 Campus Pointe Court	2012	98	98%	\$7,815,200	\$167
4		Pavilion Village	131 Gracyn Olivia Drive	2016	294	99%	\$23,270,500	\$166
4		Mallard Glen	2002 Laysan Teal Lane	2006	460	116%	\$31,444,200	\$158
4		Century Highland Creek	5410 Prosperity Ridge Road	2013	338	100%	\$22,605,000	\$141
4		Tradition, The	2525 Crescent View Drive	1999	360	98%	\$24,037,400	\$139
4		Ashford Green	230 Barton Creek Drive	1995	300	96%	\$19,726,400	\$135
4		Somerset	1400 Ventura Way	1973	240	232%	\$10,373,900	\$125
4		Colonial Grand @ Univ Ctr	608 Mccullough Drive	2006	156	89%	\$9,842,700	\$122
4		Heather Ridge	8800 Meadow Vista Road	2005	192	103%	\$10,811,300	\$121
4		Barrington Place	2410 Allerton Way	1999	348	88%	\$20,285,100	\$112
4		University Center	701 Mccullough Drive	2009	372	78%	\$23,832,700	\$110
4		Vinoy Innovation Park	8108 Vinoy Blvd	2005	356	72%	\$20,916,400	\$93
4		Highlands@ Alexander Pt.	310 Highroad Drive	2001	309	70%	\$17,244,700	\$85
4		Colonial Grand @ Mallard Creek	3025 Mallard Hill Drive	2005	252	70%	\$13,467,500	\$81
4		Belle Haven	9005 Post Canyon Lane	2014	176	59%	\$10,071,600	\$65
4		Halton Park	17701 Halton Park Drive	2007	312	59%	\$14,264,700	\$53
4		Aspen Heights	1505 Monument Hill Road	2014	144	47%	\$10,834,100	\$40
4		Ashley Court	9740 Ashley Lake Court	2009	276	52%	\$3,280,906	\$10
4		Walden Station	342 Walden Station Drive	2013	96	42%	\$4,059,500	\$10
4		Arwen Vista	11505 Masterton Road	2010	296	40%	\$11,307,300	\$2
4		Landings At Greenbrooke Common	10015 Parthenon Court	2005	279	35%	\$10,361,400	-\$17
4		Alexander Village	9224 Graham Ridge Drive	2014	326	30%	\$10,834,200	-\$35
4		Blu At Northline	6919 Tryon Street, North	2017	182	-26%	-\$3,688,400	-\$179
5	Yes	Forest Hills	5603-A Farm Pond Lane	1970	258	288%	\$17,258,100	\$202
5	Yes	Avalon Heights I	1207 Kelston Place	1986	310	223%	\$21,645,100	\$201

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
5	Yes	Ashley Place	5709 Electra Lane	1971	266	242%	\$17,614,100	\$194
5	Yes	Rama Place	5903 Florence Avenue	1984	50	572%	\$2,948,600	\$192
5	Yes	Green Rock	7259 Point Lake Drive	1983	296	227%	\$19,476,900	\$190
5	Yes	Somerstone	7139 Winding Cedar Trail	1983	360	192%	\$24,341,400	\$188
5	Yes	Oasis At Regal Oaks	6701 English Hills Drive	1984	280	284%	\$16,949,600	\$182
5	Yes	Hanover Landing	5920 Monroe Road	1972	192	285%	\$11,552,900	\$181
5	Yes	Parkwood East	7108 Wallace Road	1984	128	195%	\$7,932,200	\$173
5	Yes	Heatherwood Trace	5600 Paces Glen Avenue	1986	172	208%	\$10,145,800	\$167
5	Yes	Greenbryre	3541 Spanish Quarter Circle	1972	174	239%	\$9,740,200	\$163
5	Yes	Teal Point	3431 Sharon Amity, North	1972	216	268%	\$11,593,100	\$160
5	Yes	Woodland Estates	6147 Winged Elm Court	1988	330	185%	\$18,990,400	\$158
5	Yes	Hamilton Square	6017 Williams Road	1986	120	181%	\$6,873,800	\$157
5	Yes	Park Haven	5821 Reddman Road	1979	112	317%	\$5,678,700	\$155
5	Yes	Misty Woods	4630 Central Avenue	1985	228	189%	\$12,474,000	\$151
5	Yes	Forest At Chasewood	1600 Chasewood Drive	1985	220	236%	\$11,312,000	\$150
5	Yes	Delta Crossing	6000 Delta Crossing Lane	1989	178	142%	\$10,529,900	\$149
5	Yes	Meadowbrook	2320 Ginger Lane	1974	152	240%	\$7,758,100	\$149
5	Yes	Stonegate	950 Southwood Oaks Lane	2000	144	157%	\$8,071,200	\$147
5	Yes	Chimneys	1630 Delane Avenue	1974	214	185%	\$11,299,800	\$145
5	Yes	Kimmerly Glen	4908 Endolwood Drive	1986	260	150%	\$14,280,000	\$142
5	Yes	Eagles Walk	5826 Reddman Road	1983	162	164%	\$8,359,700	\$137
5	Yes	Briarcliff	4314-A1 Commonwealth Avenue	1963	84	224%	\$3,901,100	\$134
5	Yes	Afton House	5139 Elder Avenue	1971	71	192%	\$9,359	\$132
5	Yes	Parkland Commons	8301 Parkland Circle	1997	232	111%	\$13,344,100	\$129
5	Yes	Devonwood	6320 Woodbend Drive	1982	296	176%	\$14,079,800	\$129
5	Yes	Wellington Farms	4700 Twisted Oaks Road	1988	254	151%	\$12,277,100	\$125
5	Yes	Sharon Pointe	5626 Sharon Pointe Road	2001	190	141%	\$9,335,200	\$124
5	Yes	Woodlands	6401 Woodbend Drive	1983	128	172%	\$5,868,900	\$123
5	Yes	Lake Hill	4811 Monroe Road	1966	183	154%	\$8,500,420	\$121
5	Yes	Woodbridge	6619 Yateswood Drive	1981	192	159%	\$8,762,900	\$120
5	Yes	Regency	4817 Water Oak Road	1986	177	95%	\$10,359,100	\$119
5	Yes	Avalon Heights li	6000 Regal Estates Lane	2000	240	108%	\$12,713,000	\$117
5	Yes	Delane Glen	1315-3 Delane Avenue	1969	60	162%	\$2,658,200	\$117

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
5	Yes	Eagle Woods	6110 Forest Glen Drive	1973	112	157%	\$4,895,920	\$114
5	Yes	Axiom	5625 Keyway Blvd	1987	202	120%	\$9,639,500	\$112
5	Yes	Sailboat Bay	5417 Albemarle Road	1972	360	161%	\$14,662,400	\$108
5	Yes	Courtyard	5312-5 Montague Street	1986	55	101%	\$2,753,300	\$107
5	Yes	Brookridge	9023 W.T. Harris Blvd, East	1974	150	168%	\$5,942,510	\$106
5	Yes	Biscayne	3401-G Biscayne Drive	1993	54	97%	\$2,536,900	\$97
5	Yes	Crossings At Reedy Creek	4400 John Penn Circle	1999	207	118%	\$8,413,200	\$94
5	Yes	Park At San Ferentino	8061 Woodscape Drive	1980	216	117%	\$8,421,600	\$90
5	Yes	Copper Creek	5710 Copper Creek Court	1989	208	90%	\$8,506,300	\$80
5	Yes	Waterford Creek	10510 Waterford Creek Lane	1997	264	83%	\$11,448,300	\$79
5	Yes	W Flats	7200 Wallace Road	1986	247	90%	\$9,294,600	\$74
5	Yes	Summit Ridge	5923 Farm Pond Lane	1982	240	82%	\$8,136,400	\$61
5	Yes	Villa East	2121 Village Lake Dr.	1974	120	90%	\$2,696,300	\$44
5	Yes	Lawyers Ridge	5310 Mcalpine Glenn Drive	2001	144	63%	\$4,136,900	\$38
5		Bexley Crossing At Providence	11215 Club Creek Lane	2001	302	121%	\$43,512,513	\$340
5		Mission Matthews Place	2100 Woodway Hills Drive	1994	392	132%	\$25,206,900	\$157
5		Lansdale Crossing	4610 Central Avenue	1973	55	219%	\$3,003,900	\$156
5		Thorngrove	5701 Amity Springs Drive	2003	133	96%	\$7,905,700	\$122
5		Carlton Place	6464 W.T. Harris Blvd, East	1988	53	108%	\$2,507,200	\$105
5		Sardis Place	2808 Cross Point Circle	1989	420	104%	\$20,253,200	\$104
5		Granville	3730 Sharon Amity Road, North	1966	97	127%	\$4,135,100	\$103
5		Rose Garden	1012 Mcalway Road	1975	60	149%	\$2,351,500	\$101
5		Chatham li	5822 #1 Cedars East Court	1969	51	129%	\$2,051,300	\$97
5		M Station	6423 Monroe Road	2015	260	52%	\$12,824,500	\$41
5		Fairmarket Square	5914 Fairmarket Place	1990	60	67%	\$1,650,400	\$39
5		Enclave At Oakhurst	1636 Chippendale Road	1989	84	52%	\$2,133,400	\$21
6	Yes	Randolph Park	4516 Randolph Road	1971	152	189%	\$12,960,900	\$236
6	Yes	Quail Valley On Carmel	4012 Quail Forest Drive	1978	232	203%	\$17,950,800	\$218
6	Yes	Anson At The Lakes	8000 Waterford Lakes Drive	1991	694	191%	\$53,913,300	\$215
6	Yes	Aurea Station	8625 Winter Oaks Lane	1985	384	163%	\$30,404,100	\$210
6	Yes	Reserve At Providence I	5931 Providence Road	1971	428	194%	\$31,981,769	\$208
6	Yes	3400 Selwyn	100 Matador Lane	1971	129	212%	\$9,315,500	\$205
6	Yes	Camden Simsbury	4428 Simsbury Road	1985	100	139%	\$7,686,800	\$192

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
6	Yes	Pinetree	7600 Antlers Lane	1973	220	266%	\$13,794,500	\$187
6	Yes	Camden Foxcroft	4612 Simsbury Road	1979	156	120%	\$11,589,400	\$174
6	Yes	Andover Woods	7808 Andover Woods Drive	1987	392	166%	\$25,412,200	\$173
6	Yes	Sharon Crossing	2123 El Verano Circle	1984	144	157%	\$8,909,400	\$162
6	Yes	Reserve At Providence li	908-201 Summit Walk Drive	1986	98	112%	\$5,779,200	\$134
6	Yes	Elmsley Grove	148-1 Tyvola Drive	1966	342	210%	\$15,888,800	\$132
6	Yes	Villages	1600 Village Brook Drive	1986	224	150%	\$11,370,600	\$131
6	Yes	Park 2300	2300 Village Lake Drive	1986	384	122%	\$21,210,400	\$131
6	Yes	Park At San Remo	8242 Runaway Bay Drive	1985	280	144%	\$13,750,200	\$125
6	Yes	Beacon Hill	1322 Beacon Ridge Road	1985	349	125%	\$17,634,800	\$121
6	Yes	Sharonridge	1937 Sharon Road West	1986	75	115%	\$3,638,600	\$111
6	Yes	Crown Point	7422 Pebblestone Drive	1972	214	126%	\$9,721,600	\$109
6	Yes	Reserve At Waterford Lakes	8725 Kody Marie Court	1998	140	81%	\$7,785,600	\$99
6	Yes	River Birch I	8000 River Birch Drive	1984	210	99%	\$9,931,900	\$99
6	Yes	Berkshire Place	7700 Cedar Point Lane	1983	240	92%	\$10,957,600	\$91
6	Yes	Mcalpine Ridge	7900 Krefeld Drive	1989	320	86%	\$12,604,600	\$74
6	Yes	Colony	3701 Roxborough Pkwy	1973	269	63%	\$14,017,600	\$68
6	Yes	1700 Place	1700 Charleston Place	1986	214	91%	\$7,369,900	\$68
6	Yes	River Birch Northland	8200 River Birch Drive	2001	184	73%	\$7,138,300	\$62
6	Yes	Johnston Creek Crossing	10310 Cedar Trail Lane	1983	260	66%	\$9,631,100	\$52
6	Yes	Timber Crest At Greenway	2025 Timber Oak Drive	1999	282	64%	\$9,509,700	\$45
6	Yes	Waterford Square	7601 Waterford Square Drive	1995	694	62%	\$24,629,900	\$44
6	Yes	Park Lane	1610 Waybridge Lane	1999	60	58%	\$2,242,900	\$42
6		Southpark Commons	4401 Hampton Ridge Drive	1986	232	171%	\$24,862,000	\$288
6		1420 Magnolia	1420 Estates Avenue	2000	204	136%	\$21,371,800	\$260
6		Crest On Providence	100 Providence Square Drive	1969	473	180%	\$43,374,600	\$250
6		Madison Southpark	4605 Colony Road	1981	250	151%	\$21,131,100	\$218
6		Crossing At Quail Hollow	8850 Park Road	1985	128	152%	\$9,965,600	\$202
6		Southpark Morrison	721 Governor Morrison Street	2007	214	82%	\$22,515,700	\$189
6		Cameron Southpark	6316 Cameron Forest Lane	1984	309	110%	\$25,125,800	\$182
6		Strawberry Hill	4501 Bannockburn Place	1977	581	106%	\$43,103,105	\$162
6		Sharon West	1357 Sharon Road West	1973	72	130%	\$4,374,000	\$148
6		Crest At Greylyn	9415 Lucy Jane Lane	2013	259	95%	\$17,583,700	\$138

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
6		Camden Fairview	8738 Fairview Road	1983	135	101%	\$8,742,100	\$138
6		Cielo	4943 Park Road	2010	205	72%	\$16,504,800	\$126
6		Matthews Crossing I	7815 Calibre Crossing Drive	1988	240	111%	\$13,320,200	\$125
6		Bridges @ Quail Hollow	7561 Quail Meadow Lane	1981	50	99%	\$2,586,400	\$108
6		Galleria Village	1616 Galleria Club Lane	2005	210	76%	\$12,581,700	\$101
6		Crest At Galleria	1815 Galleria Club Lane	2009	48	63%	\$2,063,500	\$55
6		5115 Park Place	5115 Park Road	2016	273	50%	\$18,355,600	\$48
6		Eastover Ridge	3300 Eastover Ridge Drive	1995	424	70%	\$12,892,000	\$46
6		Post Park Phillips Place	4835 Cameron Valley Pkwy	1997	402	48%	\$20,272,948	\$30
6		Lavie Southpark	5725 Carnegie Blvd	2016	321	40%	\$18,312,800	\$0
6		Mcmullen Woods	6508-C Walsh Boulevard	1992	55	5%	\$122,900	-\$52
6		Mezzo1	130 Sharon Township Lane	2014	100	25%	\$3,702,200	-\$78
6		Seneca Woods	1509 Seneca Place Apt. F	1992	50	4%	\$168,200	-\$98
6		Allure	5720 Carnegie Boulevard	2015	350	22%	\$13,003,800	-\$109
7	Yes	Retreat @ Mcalpine Creek	6800 Fishers Farm Lane	1989	400	123%	\$30,653,600	\$182
7	Yes	Colonial Grand @ Beverly Crest	7201 Shannopin Drive	1995	300	118%	\$21,256,300	\$165
7	Yes	Swan Run	4600 Swan Meadow Lane	1973	88	165%	\$4,925,500	\$149
7	Yes	Reafield Village	6609 Reafield Drive	1986	324	102%	\$20,449,100	\$135
7	Yes	Camden Touchstone	9200 Westbury Woods Drive	1986	132	106%	\$7,417,100	\$123
7	Yes	Marquis Of Carmel Valley	6905 Poppy Hills Lane	1998	424	81%	\$24,070,200	\$102
7	Yes	Shorewood At Raintree	7907 Shorewood Drive	1979	96	94%	\$4,223,700	\$89
7	Yes	Fairways At Piper Glen	6200 Birkdale Valley Dr	1995	336	56%	\$14,049,000	\$42
7		Camden Ballantyne	13901 Summit Commons Boulevard	1997	400	157%	\$45,299,400	\$296
7		Legacy At Ballantyne	9200 Otter Creek Drive	1997	282	137%	\$27,673,700	\$244
7		Arboretum	7700 Arboretum Drive	1989	277	150%	\$25,835,400	\$240
7		Rock Creek At Ballantyne	7810 Spindletop Place	1997	330	137%	\$31,288,000	\$236
7		Marquis At Carmel Commons	6818 Northbury Lane	2000	312	127%	\$27,272,800	\$210
7		Cheswyck At Ballantyne	14360 Wynhollow Downs Lane	1999	528	125%	\$45,550,400	\$206
7		Solis Waverly	6101 Ardrey Kell Road	2016	375	79%	\$35,998,300	\$167
7		Preserve At Ballantyne Commons	11280 Foxhaven Drive	1998	270	92%	\$21,373,800	\$157
7		Bell Ballantyne	16311 Hawfield Way Drive	2009	210	73%	\$19,703,400	\$150
7		Legacy Arboretum	1729 Echo Forest Drive	1995	266	100%	\$18,540,500	\$148
7		Bexley At Springs Farm	3300 Open Field Lane	2000	316	92%	\$23,125,100	\$146

List of Apartment Complexes

COUNCIL DISTRICT	NOAH	PROPERTY NAME	ADDRESS	YEAR BUILT	NUMBER OF UNITS	PERCENT CHANGE IN ASSESSED VALUE	CHANGE IN CITY TAX AMOUNT	CITY TAX CHANGE PER UNIT
7		Promenade Park	11115 Shadow Grove Circle	2002	252	78%	\$20,461,200	\$140
7		Providence Court	8110 Providence Court Lane	1996	420	94%	\$28,852,900	\$139
7		Atkins Circle	12506 Atkins Circle Drive	2004	568	73%	\$35,504,200	\$101
7		Camden Stonecrest	8620 Bella Reese Road	2001	306	70%	\$19,607,700	\$98
7		Plantation Park	14325 Plantation Park Blvd.	2000	278	68%	\$16,748,600	\$88
7		Providence Park	4800 Alexander Valley Drive	1999	312	58%	\$19,351,800	\$68
7		Blakeney	8718 Wintersweet Lane	2008	295	56%	\$16,495,327	\$57
7		Legacy 521	15640 Lancaster Highway	2015	248	52%	\$14,764,700	\$50
7		Solis Ballantyne	9550 Community House Road	2016	194	49%	\$12,323,200	\$43

Section 2:
Questions and Answers on Capital Projects
From February 6 Budget Workshop

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During the Budget Workshop on February 6, 2019, City Council was provided with a list of project status updates entitled, "Preliminary 2014 – 2020 General Community Investment Plan Updates." During that meeting, it was noted that staff would bring updates on any remaining active, off-cycle projects to City Council at a later date. Attached, please find project updates for the remaining capital projects.

General Community Investment Plan Project Updates Continued

#	Project Name	Current Phase	Estimated Completion Date (Calendar Year)	Status
Neighborhood Reinvestment Program				
1	Ardrey Kell Sidewalk	Planning	Establish Upon Completion of Planning	On Target
2	North Community House Road at Ballantyne Commons Parkway Turn Lanes	Planning	Establish Upon Completion of Planning	On Target
3	Ballantyne Commons Parkway at Rea Road Turn Lanes	Planning	Establish Upon Completion of Planning	On Target
4	NC-51 at Providence Road Turn Lanes	Planning	Establish Upon Completion of Planning	On Target
Southeast Land Acquisition and Street Connections				
5	City View / Buick Drive Connector	Design	Q3 2020	On Target
6	Oakhurst / Amity Gardens Street Connections	Design	Q4 2022	On Target
7	Albemarle / Pierson Crossing	Planning	Establish Upon Completion of Planning	On Target
East / Southeast Corridor Sidewalk and Bikeway Improvements				
8	North Pedestrian/Bike Boulevard	Design	Q1 2023	On Target
9	South Pedestrian/Bike Boulevard	Design	Q1 2023	On Target
10	Briar Creek Road Connector	Design	Q3 2021	On Target
Applied Innovation Corridor				
11	Matheson Avenue Bridge	Design	Q4 2022	On Target
12	16 th Street	Design	Q1 2021	On Target
13	ATCO (Graham Street Streetscape)	Design	Q4 2022	On Target
14	North Tryon Gateway	Construction	Q2 2020	On Target
Bicycle Travel				
15	South Boulevard Parallel Route	Planning	Establish Upon Completion of Planning	On Target
16	South Tryon Street Parallel Route	Planning	Establish Upon Completion of Planning	On Target
17	6 th Street Cycle Track	Design	Q4 2021	Project will be completed with capital savings*
18	7 th Street Bridge Diet	Planning	Establish Upon Completion of Planning	On Target
19	The Plaza Road Conversion	Planning	Establish Upon Completion of Planning	On Target
20	First Ward to 6 th Street Bike Boulevard	Planning	Establish Upon Completion of Planning	On Target

General Community Investment Plan Project Updates Continued

#	Project Name	Current Phase	Estimated Completion Date (Calendar Year)	Status
21	Elizabeth Bike Boulevard Connections	Planning	Establish Upon Completion of Planning	On Target
22	Brevard Street Bike Boulevard	Planning	Establish Upon Completion of Planning	On Target
23	Selwyn Park Wayfinding	Planning	Establish Upon Completion of Planning	On Target
24	3 rd Street / 4 th Street Bike Lane Improvements Uptown	Planning	Establish Upon Completion of Planning	On Target
Transportation Safety (Vision Zero)				
25	Neighborhood Traffic Calming	Planning	Establish Upon Completion of Planning	On Target
26	New Thoroughfare Street Lighting	Planning	Establish Upon Completion of Planning	On Target
27	Education Campaigns	Planning	Establish Upon Completion of Planning	On Target
28	Traffic Safety Infrastructure	Planning	Establish Upon Completion of Planning	On Target
29	Traffic Safety Signs	Planning	Establish Upon Completion of Planning	On Target
30	Evaluations	Planning	Establish Upon Completion of Planning	On Target
31	Special Projects	Planning	Establish Upon Completion of Planning	On Target
Corridor Program				
32	Parkwood Road Improvements	Design	Q2 2021	On Target
33	South Tryon Corridor	Design	Q4 2020	On Target
34	South Boulevard Corridor	Design	Q4 2020	On Target
35	West Boulevard Corridor	Design	Q4 2020	On Target
Area Plan Program				
36	Montford Drive to Abbey Place Street Connection	Design	Q4 2021	On Target
37	Montford Drive and East Woodlawn Signal	Design	Q4 2019	On Target
38	Cherry Traffic Calming	Planning	Establish Upon Completion of Planning	On Target

General Community Investment Plan Project Updates Continued

#	Project Name	Current Phase	Estimated Completion Date (Calendar Year)	Status
Neighborhood Improvement Program				
39	Howie Acres Phase II	Design	Q1 2020	On Target
40	Newell South Phase I	Design	Q4 2020	On Target
41	Newell South Phase II	Planning	Establish Upon Completion of Planning	On Target
Placemaking Program				
42	Montford Drive Placemaking Enhancements	Design	Q4 2019	On Target
43	Belk Greenway Connector	Design	Q2 2023	On Target
44	South End Rail Trail I-277 Pedestrian Bridge	Planning	Q3 2023	On Target
45	35 th Street Extension	Developer Partnership	N/A	Waiting on Partnerships
46	Lakeview Road Farm to Market	Design	Q2 2023	On Target
47	Tuckaseegee / Berryhill / Thrift Roundabout	Design	Q1 2021	On Target
48	1419 Roof Replacement	Construction	Q2 2019	On Target
49	Fire Station #27 Renovations	Construction	Q2 2019	On Target
50	Louise Ave Parking Lot Repairs	Construction	Q4 2019	On Target
51	Cemeteries - Roads and Storm Water Renovations and Master Plan	Design	Q4 2021	On Target
52	Discovery Place Chiller	Construction	Q2 2019	On Target
53	Fleet Security Needs	Varies	Varies	On Target
54	Fleet Facility Repairs	Varies	Varies	On Target
55	CMGC Floor Renovations	Varies	Varies	On Target
56	Building Maintenance Program	Ongoing	N/A	On Target
57	Parking Lot / Deck Repairs	Ongoing	N/A	On Target
58	Roof Replacement Program	Ongoing	N/A	On Target
59	Fire Station Renovations	Ongoing	N/A	On Target
60	Government Center and Plaza Renovations	Ongoing	N/A	On Target
61	CMGC Parking Deck Maintenance	Ongoing	N/A	On Target
62	Fire Logistics Parking Lot Renovation	Design	Q4 2019	On Target

Legend:

*Project savings have been identified through the project close-out process that may eliminate some budget risk.

Dark blue highlights represent major umbrella projects with sub-projects listed below in light blue highlights.

Notes:

1. All projects have the risk of escalating construction market, poor soils, rock, etc.
2. New facilities listed above are all designed to meet LEED v4 standards. Facilities listed above DO NOT have funding to support the Strategic Energy Action Plan.
3. Facility renovation projects are not scoped to pursue LEED certification. The Central Avenue Innovation and Technology Relocation and Circular Economy Innovation Barn do not have the budget to pursue LEED or Strategic Energy Action Plan goals.

Section 3:
Questions and Answers
From March 6 Budget Workshop

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Questions and Answers

From March 6 Budget Workshop

Revaluation Analysis

Question 1: Why are there no neighborhoods listed for Neighborhood Profile Area 86 on page 9 of the Q&As from the February 6 workshop?

Neighborhood Profile Area (NPA) 86 is an area of primarily multi-family housing. There are 46 single-family housing units within NPA 86 that are included in the revaluation analysis (reflected on page 37 of the February 6 Q&A packet).

NPA 86 is a small part (<20%) of the Commonwealth Park NextDoor neighborhood, and the section of single-family parcels is a very small part of that NextDoor neighborhood along Briar Creek Road. Therefore, Commonwealth Park did not show up in the table.

Redefining the Capital Planning Process

Question 2: Please provide a list of the non-scored plusses and minuses which affect the City's credit rating.

The three nationally recognized rating agencies (Moody's, S&P, and Fitch) each have their own rating criteria and metrics. However, they are all similar in nature and fact gathering. Moody's has four criteria which were mentioned at the March 6 workshop (e.g., economy/tax base, finances, management, and debt/pensions).

In addition to the four specific factors, Moody's looks at "below the line" notching adjustments. These potential adjustments are not published, but they likely include the following:

- Diversity of the economic base and growth in size of the economy, including it's various employment segments
- Growth in jobs and median incomes and overall employment statistics
- Growth in revenues and levels of expense growth and change
- Overall financial performance and trends in strength/consistency of financial results
- Strength of the management staff, including tenure and prior experience
- Performance of actual expenses to the budget over a number of years; essentially the soundness and trends of the operating budget
- Level of services and the management of service costs and efficiencies
- Types of debt issued and underlying debt policies
- Role and importance of the North Carolina Local Government Commission and its role in maintaining strong credits throughout North Carolina
- Pension system performance, level of benefits and amount of unfunded liabilities

Questions and Answers

From March 6 Budget Workshop

Question 3: Explain capital project contingency and when that contingency is no longer needed. Provide a list of contingencies for all projects.

Project budgets contain contingency funding to account for unexpected expenses during design, land acquisition, and construction. These funds minimize risk and reduce the possibility of a project exceeding its budget. Generally, contingency funding remains in the budget until the project is complete and final costs are certain.

As a project progresses, the available contingency constantly changes; therefore, exact contingency amounts are difficult to report on. Project managers continually monitor the project budget, including contingency, to determine the status of funding and the possibility of reallocation. As the new project close-out process is finalized, all complete projects with unused contingency will be included for reallocation in the City Manager's Proposed Fiscal Year 2020 Budget.

CATS

Question 4: Provide a comparison between the pay of the Bus Operation Division (BOD) and CATS security employees with City of Charlotte employees (including CMPD officers).

Bus Drivers

BOD employees are members of a union and are not City of Charlotte employees. State law does not permit the City to collectively bargain with the bus driver union, therefore, the City hires a management company. The management company is responsible for setting bus drivers' compensation. There are no City bus drivers to provide a comparison to BOD driver compensation.

Security Services

In determining how to provide for this service, we look at several factors, including level of service needed, available resources, and cost. Some of the services provided by the private security firm include:

- Fare inspections including issuance of appropriate warnings/citations
- Testifying in court hearings or depositions
- Coverage of all designated security posts
- Conducting foot and vehicle security patrols

For private security personnel in the field, the cost is approximately \$3.0 million (includes: equipment, vehicles, training). To have the same level of service using CMPD officers, it would cost approximately \$9.0 million the first year (approximately \$6.0 million for personnel and \$3.0 million for equipment and training). This would be an additional \$6.0 million for CMPD and 76 new officers.

Questions and Answers

From March 6 Budget Workshop

Stormwater

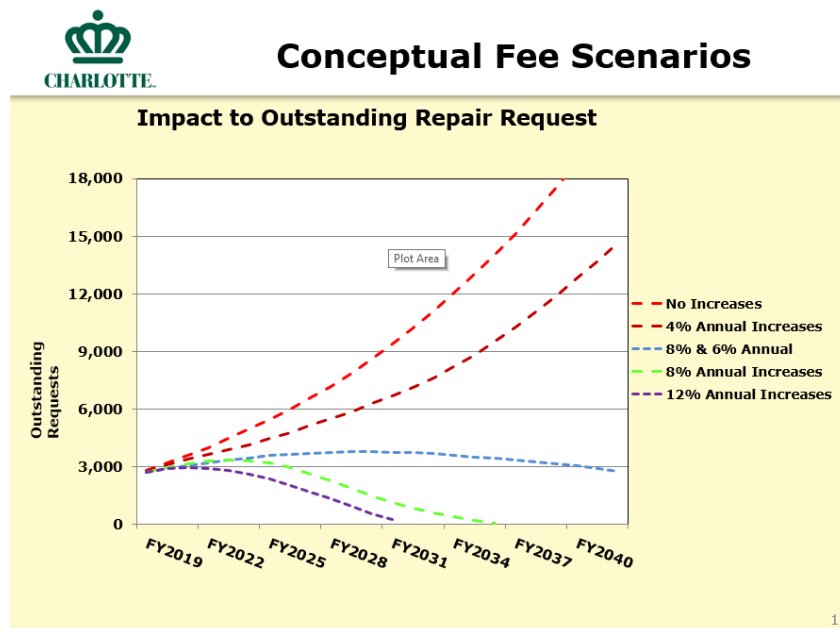
Question 5: Why has the total amount for Category A and B projects dropped from around \$400 million to around \$200 million?

During the April 11, 2018 Council Budget Workshop, staff presented information that estimated all expected costs for a period of seven years. This included funded, and unfunded projects, along with other program costs such as AI's, C's and Surface Water Quality projects. The projected future value of the A's and B's was shown as approximately \$400 million, which assumed annual cost inflation. The \$200 million referred to during the March 6, 2019 presentation by staff referred only to unfunded A and B projects, in present dollars, and does not include existing funded projects.

Question 6: Provide updated versions of the charts which were shared with City Council during the development of the FY 2019 budget which show the backlog of projects and the impact of various rate increase scenarios.

Similar to the work on the financial model for the General Community Investment Plan described at the March 6, 2019 Budget Workshop, the assumptions and methodology underlying Storm Water's financial model, as well as project prioritization and delivery, are being reevaluated for FY 2020. Reevaluating the financial model will impact the financial outlook in future years and the capacity to deliver projects. This does not allow us to update the information from the FY 2019 Budget Workshop in the same manner. However, this reevaluation will assist in the development of a Storm Water program that addresses the City's highest priority projects more efficiently.

As a reference point, below is the chart presented at the April 11, 2018 City Council Budget Workshop as part of FY 2019 Budget Development.



Questions and Answers

From March 6 Budget Workshop

Public Safety Pay Plan

Question 7: Provide the data on the number of job applications and turnover for CMPD in recent years.

CMPD has been fortunate to receive applicants from across the country. In a review of applications submitted from April of 2014 to March of 2019 (five years), a total of 13,906 applicants engaged with the Department. Most of the Officer applications originated in North Carolina (72.21 percent). Of the remaining 3,864 applications, 542 came from cities identified by staff as peer cities. The table below shows what region of the country each applicant originated.

Police Applicant Summary by Region		
Location	Number of Applicants	Percent
North Carolina	10,042	72.21%
Southeast (Excluding NC)	265	1.91%
Mid-West	224	1.61%
West Coast	53	0.38%
<i>Subtotal peer Cities</i>	10,584	76.11%
Total Applicants	13,906	

CMPD's turnover is influenced by many factors like retirement, promotions, and voluntary separation. The below tables show turnover in each of the categories for calendar year 2018 and a five-year average.

Police Officer			
2018 Turnover			
Seperation Type	Total # of Terminations	Total # of Actives	Percent Turnover
Involuntary	2	1473	0.1%
In Lieu of Termination	3	1473	0.2%
Retirement	56	1473	3.8%
Voluntary	53	1473	3.6%
Officer Promotions	39	1473	2.6%
Total Turnover	153		10.4%

Questions and Answers

From March 6 Budget Workshop

Police Officer			
2014-2018 Turnover			
Seperation Type	Total # of Terminations	Total # of Actives	Percent Turnover
Involuntary	1	1476	0.1%
In Lieu of Termination	3	1476	0.2%
Retirement	42	1476	2.8%
Voluntary	42	1476	2.8%
Officer Promotions	24	1476	1.6%
Total Turnover	112		7.6%

General Employee Pay Practice Comparison

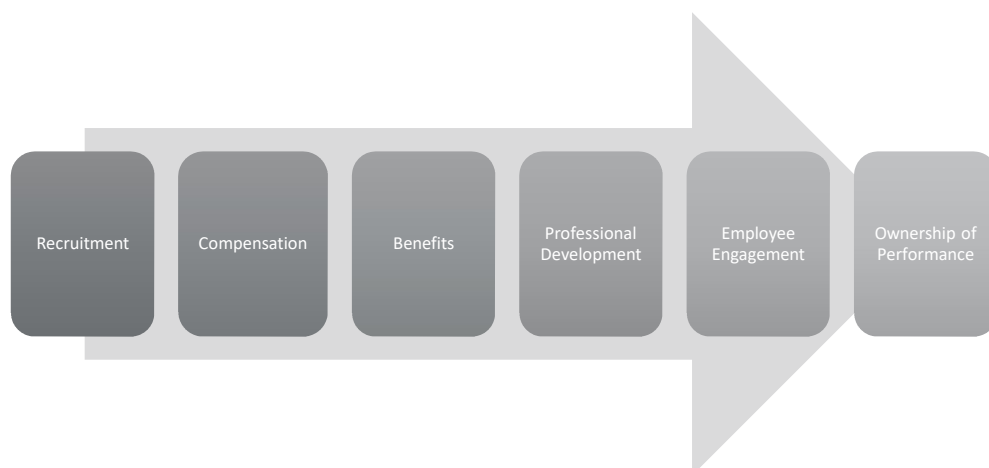
City Council Budget Workshop
April 3, 2019



Recap: Becoming an Employer of Choice



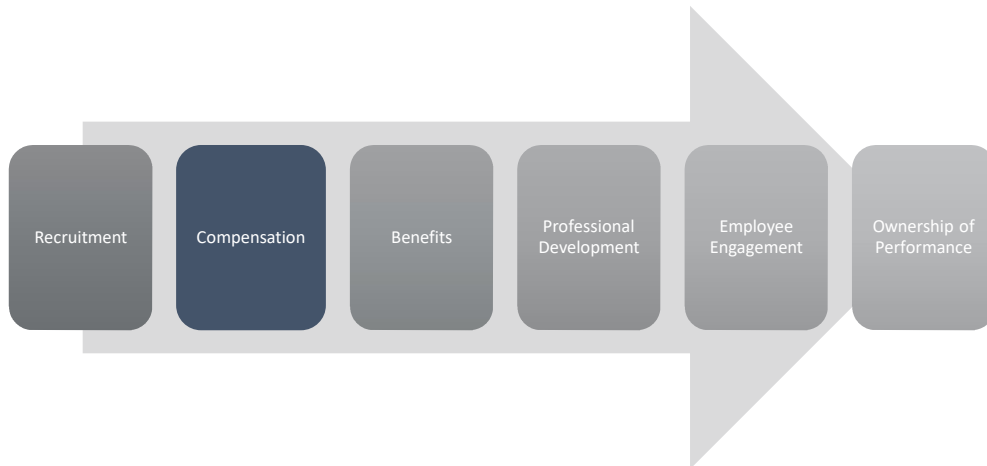
Pathway to Employer of Choice: Core Areas



Today We Will Focus on Compensation:



Pathway to Employer of Choice: Core Areas



3

Purpose



- Present findings from pay practice survey of peer cities including:
 - ❑ Employee retention data
 - ❑ Salary increase comparison over past three fiscal years
 - ❑ FY 2020 projected salary increases
 - ❑ Comparison of pay systems



4

Employee Retention Data

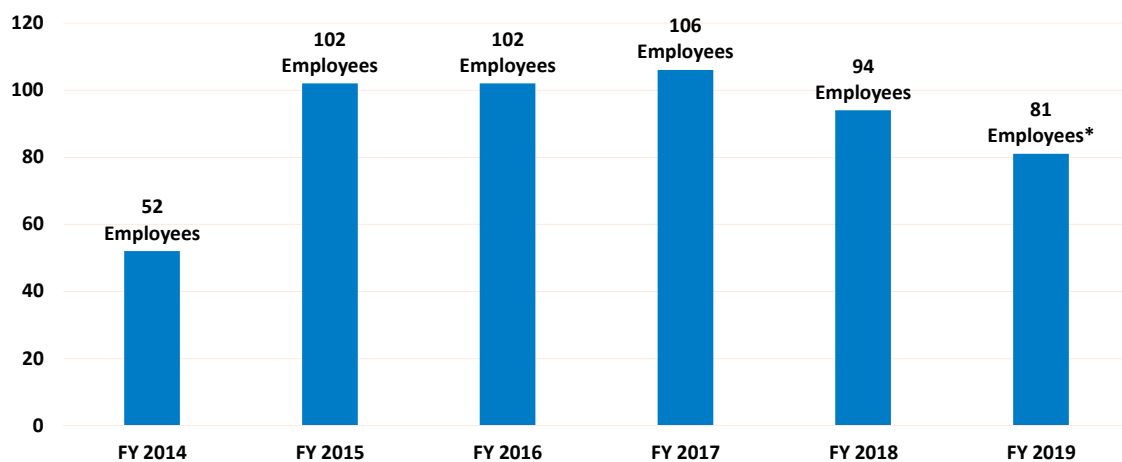


5

Charlotte Lost an Average of 91 General Employees Annually to Retirement From FY 2014 to FY 2018



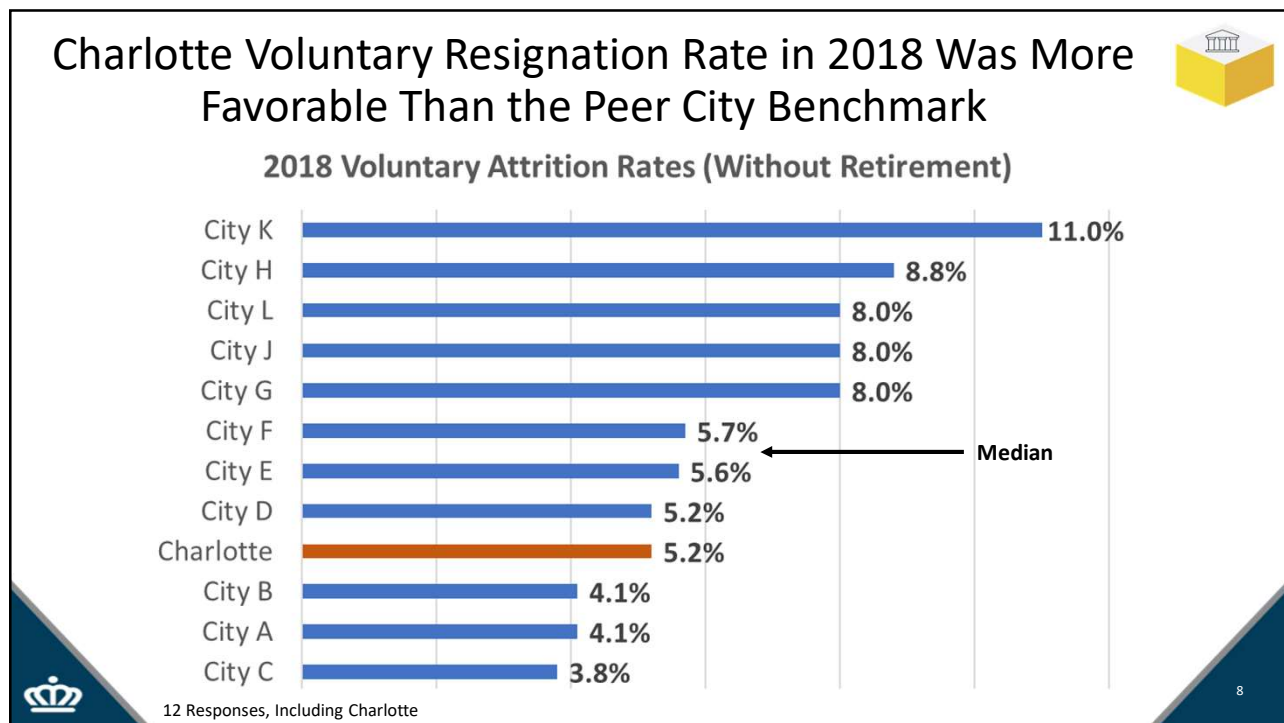
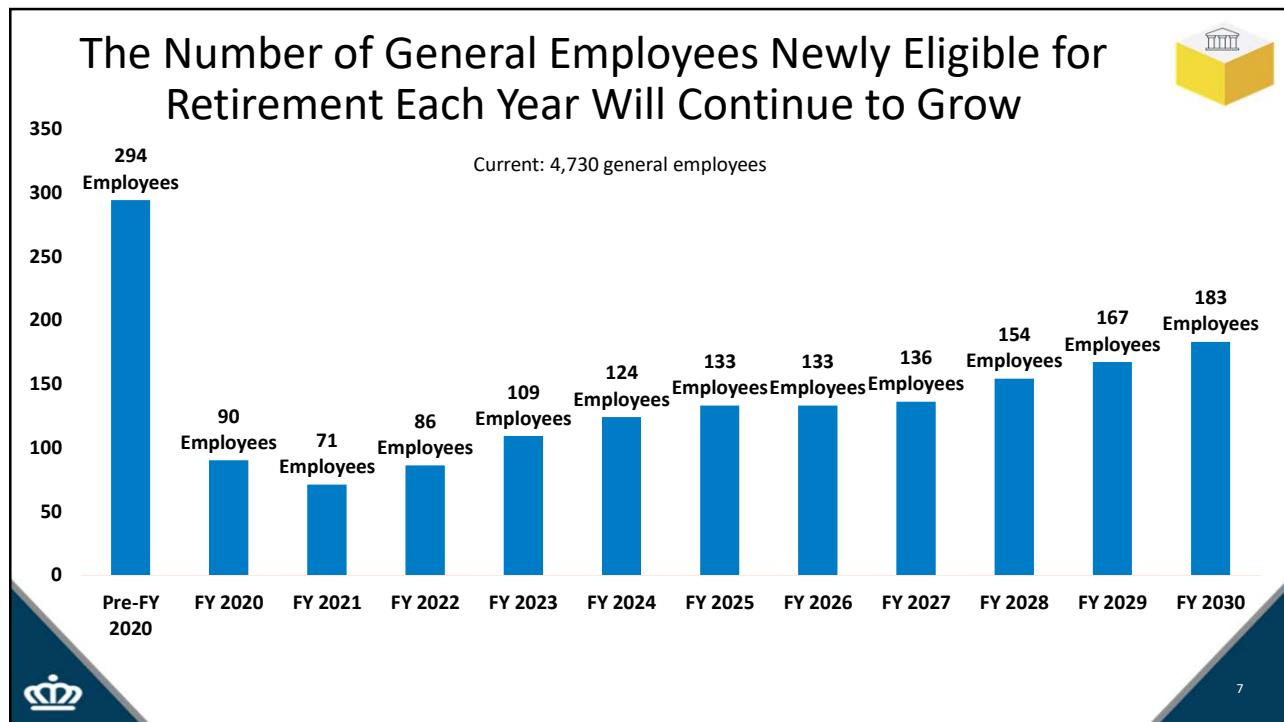
Current: 4,730 General Employees



*FY 2019 retirements through 2/1/2019



6

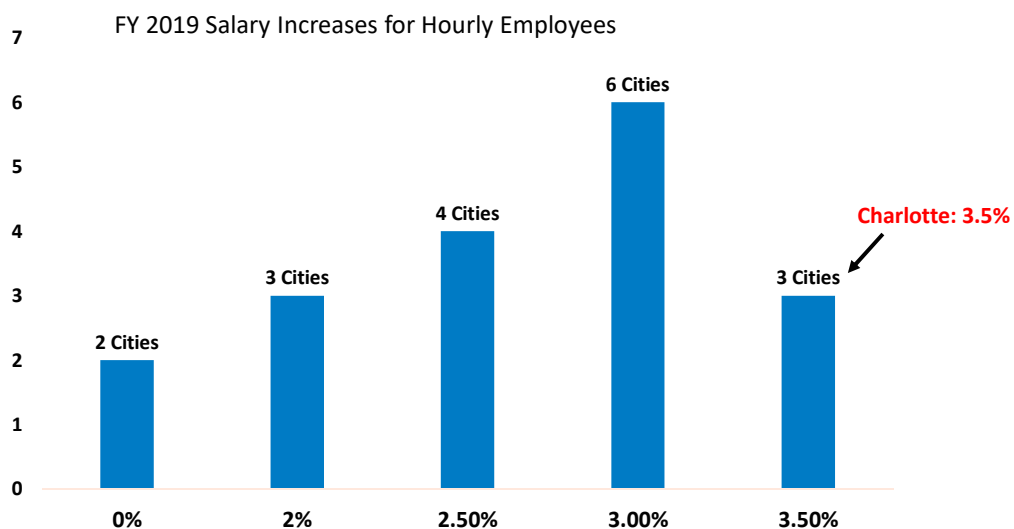


Comparison of Annual General Employee Pay Increases



9

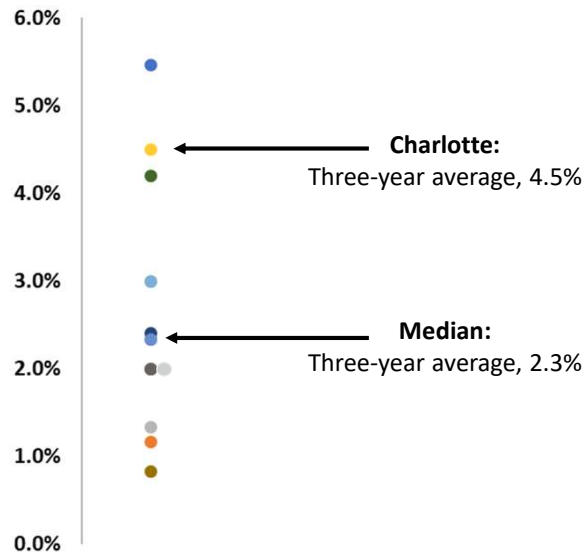
Charlotte's FY 2019 Increase for Hourly Employees Exceeds Peer City Benchmarks



18 Responses, Including Charlotte. All responses rounded to nearest half percent.

10

Charlotte's Three Year Average Increase for Hourly Employees Exceeds Peer City Benchmarks



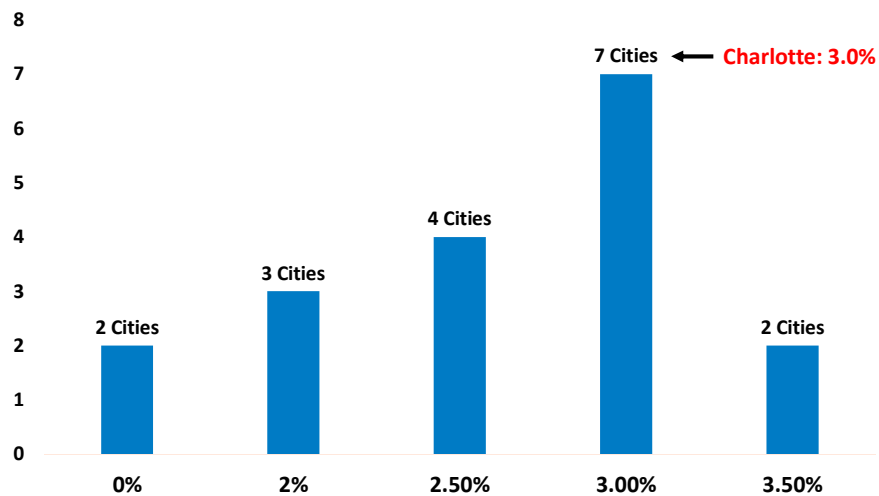
12 Responses, Including Charlotte

11

Charlotte's FY 2019 Increase for Salaried Employees Is Competitive With Peer City Benchmarks



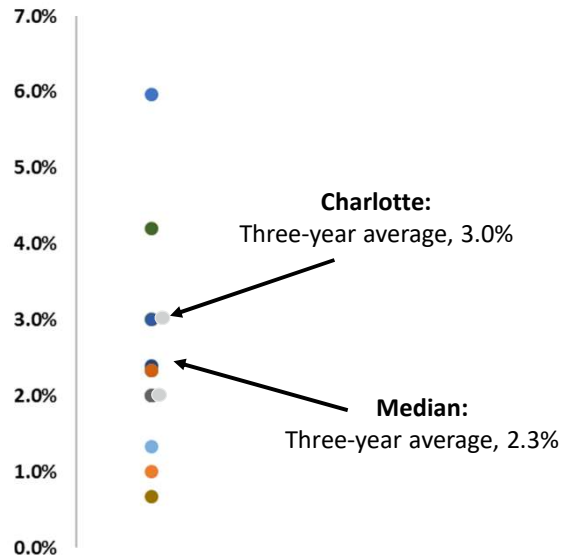
FY 2019 Salary Increase for Salaried Employees



18 Responses, Including Charlotte. All responses rounded to nearest half percent.

12

Charlotte's Three Year Average Increase for Salaried Employees is Competitive Peer City Benchmarks



13 Responses, Including Charlotte

13

Projecting FY 2020 Salary Increases



FY 2020 Projected Salary Increases	
Source	2020 Projected Increase
National Statistics Provided by World at Work, Hewitt, and Mercer Consulting	3.0%
National Municipalities	3.0%
Charlotte Area Municipalities	3.0%
Large Charlotte Employers (private sector)	3.0%
The Employers Association	3.2%



14

Pay Structure Comparison



15

Establishing a Market Pay Rate



- Charlotte benchmarks using public and private pay data
- Market pay is set by using a percentile of all salary data for each position
- Charlotte's use of 50th Percentile is in line with peer city benchmarks:

Percentiles Cities Use to Set Market Pay		
25 Percentile	50 Percentile	55 Percentile
1 City	14 Cities	1 City

- Once market pay is established, a minimum and maximum range is built around it.



16

Charlotte's Current Pay Structures by Employee Type

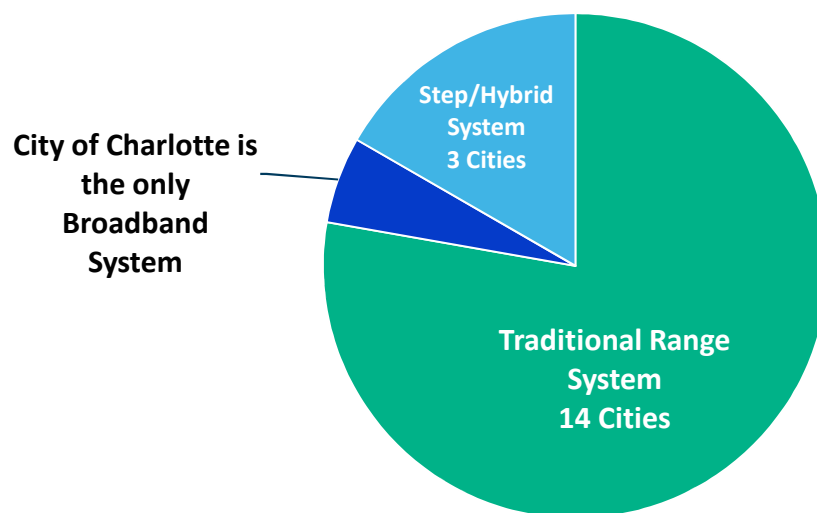


Type of Employees	Number of Employees	Percent of Employees	Description of Pay System
Hourly Employees	2,833	38%	Pay Range System
Salaried Employees	1,897	26%	Broadband Pay System
Police and Fire Pay Plan Employees	2,714	36%	Step System



17

Most Cities Use a Traditional Range System for Salaried General Employee Pay



18 Responses, Including Charlotte

18

Broadband vs. Traditional Range System



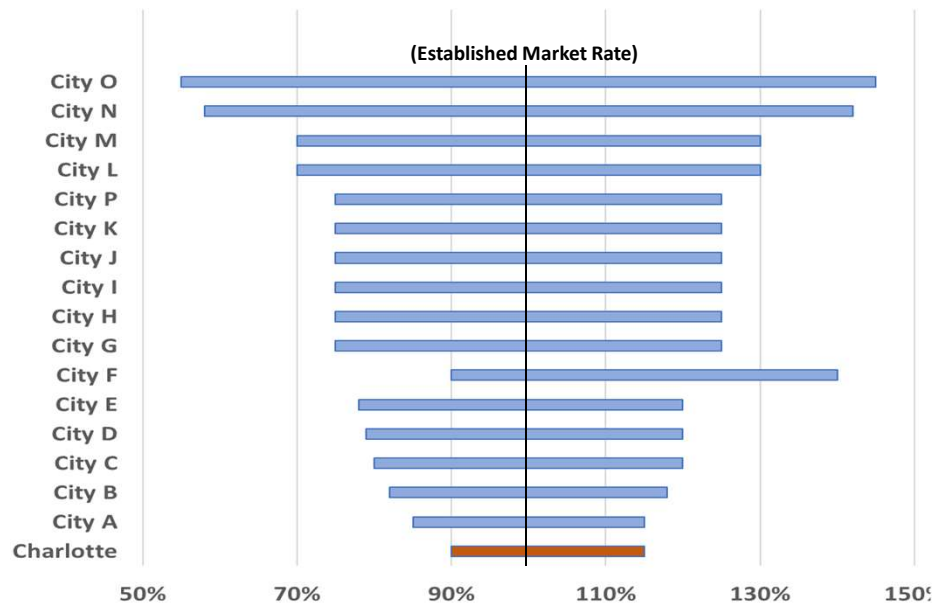
Broadband System	Traditional Range System
Fewer ranges	More ranges
Big difference between minimum and maximum	Smaller difference between minimum and maximum
Less consistent pay across the city for similar work	More consistent pay across the city for similar work
More vertical compression*	Less vertical compression*
Less defined career paths	Better defined career paths

*Defined as employees paid more than someone who either supervises them or has more work responsibility.



19

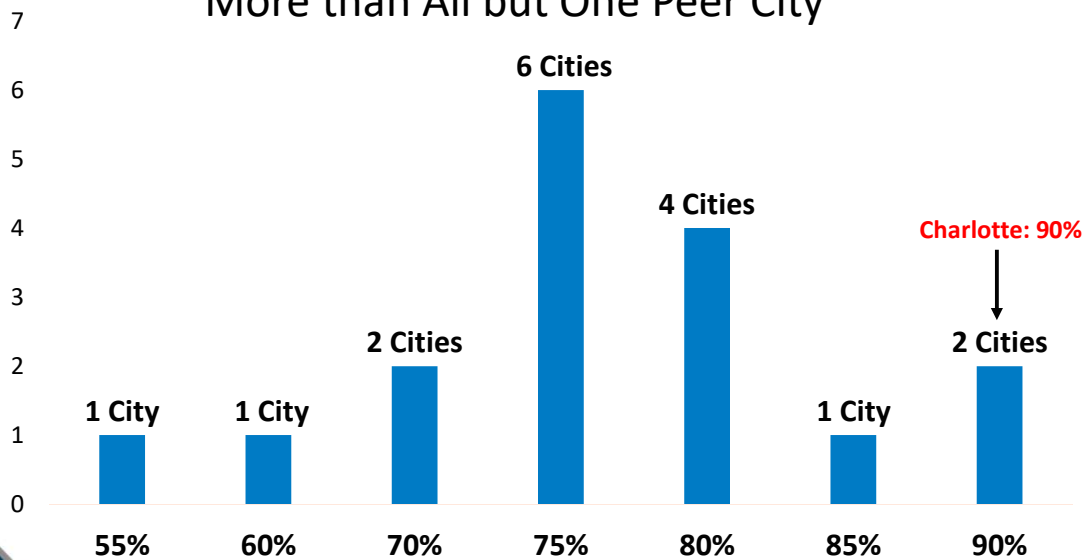
Charlotte's Hourly Pay Range is Narrower Than All Peer Cities



17 Responses, Including Charlotte

20

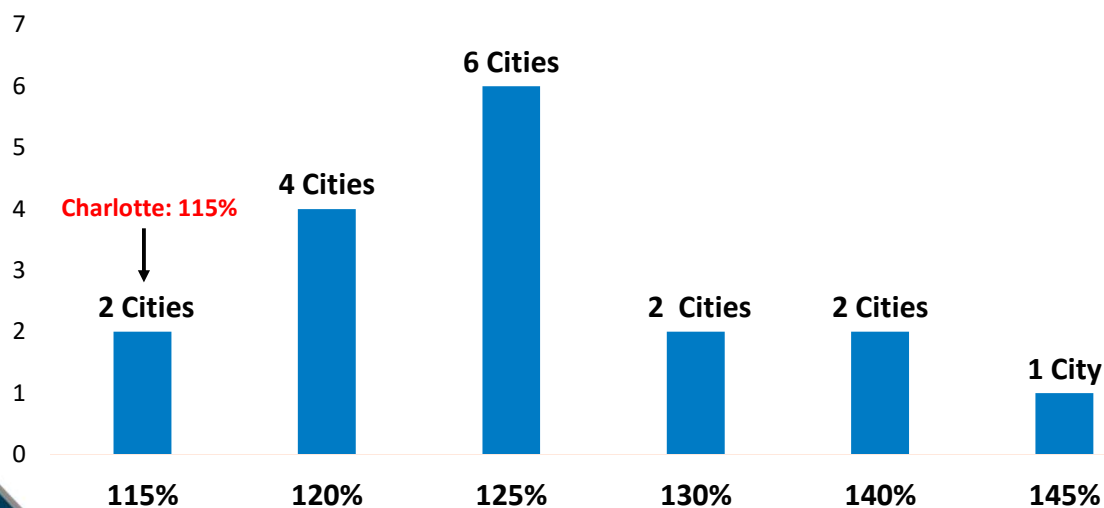
Charlotte's Bottom of Pay Range for Hourly Employees is More than All but One Peer City



17 Responses, Including Charlotte (All responses rounded to nearest 5%)

21

Charlotte's Top of Pay Range for Hourly Employees Is Lower than All but One Peer City



17 Responses, Including Charlotte, (All responses rounded to nearest five percent)

22

General Employee Pay Structure Considerations



- Revise the compensation structure
 - ❑ Expand the hourly employee pay range from 90-115 percent to 80-125 percent
 - ❑ Convert salaried employees to a traditional range system
 - Align range to same spread as hourly employee pay range
 - Consider splitting increase into a merit and general wage increase components



23

Questions?



24



Retirement Plan Comparison

City Council Budget Workshop

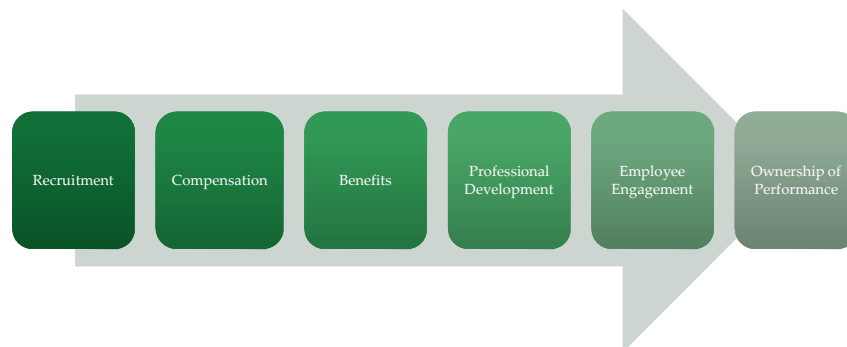
April 3, 2019

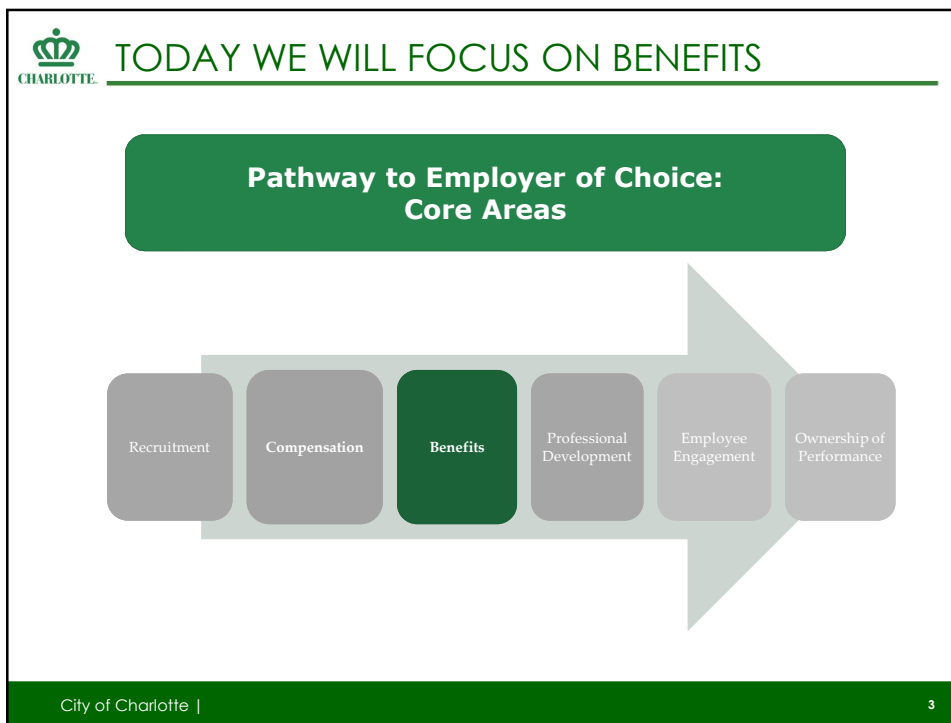



BECOMING AN EMPLOYER OF CHOICE

Targeted focus on six inter-connected facets of organizational culture

Pathway to Employer of Choice: Core Areas





 **PURPOSE**

Provide retirement plan comparison of peer cities including:

- An overview and comparison of existing retirement plans available to Charlotte employees
- A comparison of the types of retirement plans offered by Charlotte and peer cities
- Actuarial analysis of Charlotte's retirement plans compared to peer cities

City of Charlotte | 4



TWO TYPES OF DEFINED BENEFIT PENSIONS

Defined Benefit Pension Plan (that replaces Social Security)

Annual benefit determined by formula. Employees do not pay into or receive Social Security.

30 (years) X \$75,000 (average salary) X 2.6% (multiplier) = \$58,500 (annual benefit).
Employee do not pay or receive Social Security benefit on earnings with city.

Defined Benefit Pension Plan (no impact to Social Security)

Annual benefit determined by formula. Employees pay into and receive Social Security.

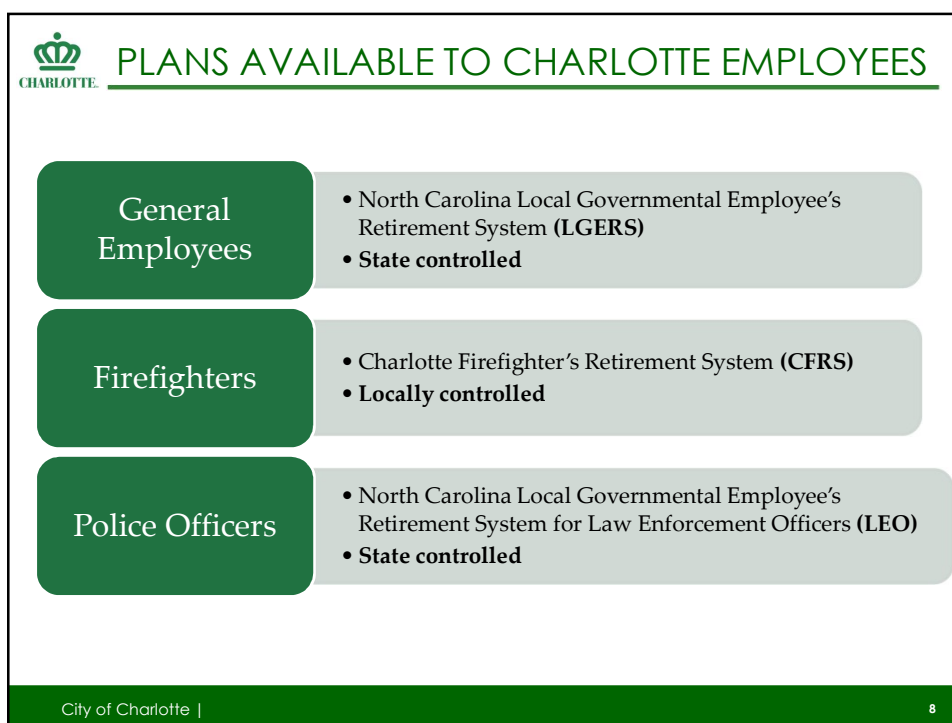
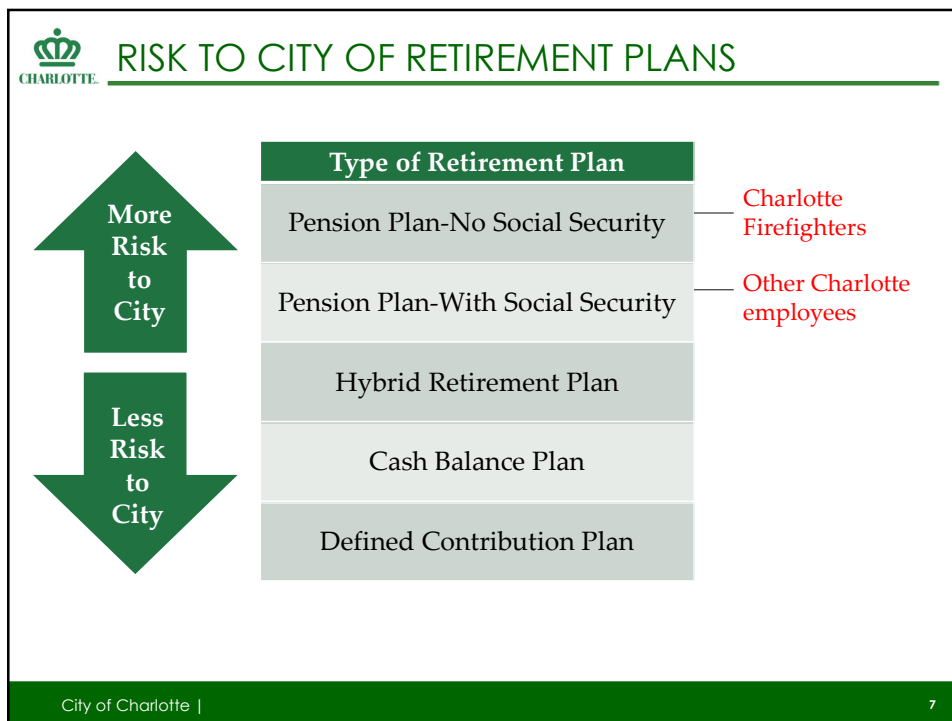
30 (years) X \$75,000 (average salary) X 1.85% (multiplier) = \$41,625 (annual benefit).
Employee will also receive Social Security benefit for career earnings with city.



RETIREMENT PLANS OTHER THAN PENSION PLANS

Other Types of Retirement Plans Offered by Cities

Cash Balance Retirement Plan	<ul style="list-style-type: none"> • Employer contributes set amount during employment. • Annual payment at retirement based on cash balance of plan.
Defined Contribution Retirement Plan (401k)	<ul style="list-style-type: none"> • Employer contributes set amount during employment. • The employee manages the cash upon retirement.
Hybrid Retirement Plan	<ul style="list-style-type: none"> • Combines a (typically lower) multiplier in a pension plan with a defined contribution plan.





COMPARING CHARLOTTE EMPLOYEE PLANS

Description	LGERS(general)	CFRS (fire)	LEO (police)
Full retirement eligibility	Any age/30 years Age 60/25 years Age 65/5 years	Any age/ 30 years Age 50/25 years Age 60/5 years	Any age/30 years Age 55/5 years
Compensation for Pension Formula	Average of 4 highest consecutive years	Average of 2 highest consecutive years	Average of 4 highest consecutive years
Pension Multiplier	1.85%	2.6%	1.85%
Receive Social Security	Yes	No	Yes
Receive Separation Allowance	No	No	Yes
Employee Contribution	6%	12.65%	6%
Additional City 401k Contribution	3%	3%	5%



EXAMPLE OF CHARLOTTE EMPLOYEE PLANS

Description	LGERS(general)	CFRS (fire)	LEO (police)
Top 4 Years Salary	\$65,000 \$67,000 \$69,000 \$71,000	\$65,000 \$67,000 \$69,000 \$71,000	\$65,000 \$67,000 \$69,000 \$71,000
Average Salary for Calculation	\$68,000	\$70,000	\$68,000
Pension Multiplier	1.85%	2.6%	1.85%
Years of Service	30	30*	30
Annual Pension	\$37,740	\$54,600	\$37,740
Note		Doesn't receive Social Security on city earnings	Receives Separation Allowance until age 62

*30 is used for consistency. Firefighters may retire at 25 years and age 50



COMPARISON OF 20 CITIES (INCLUDING CHARLOTTE)

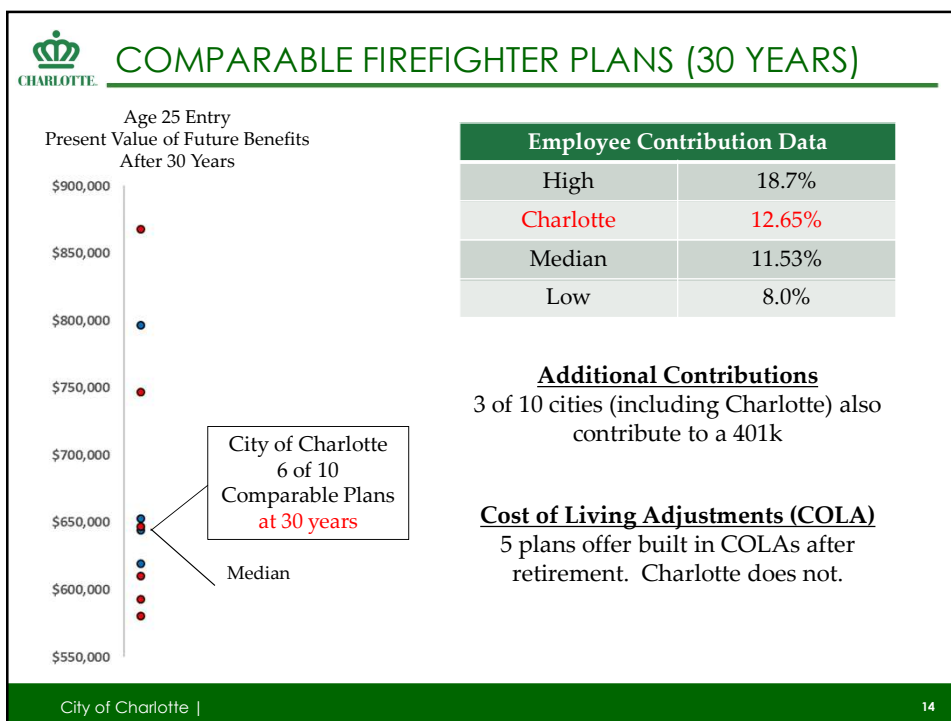
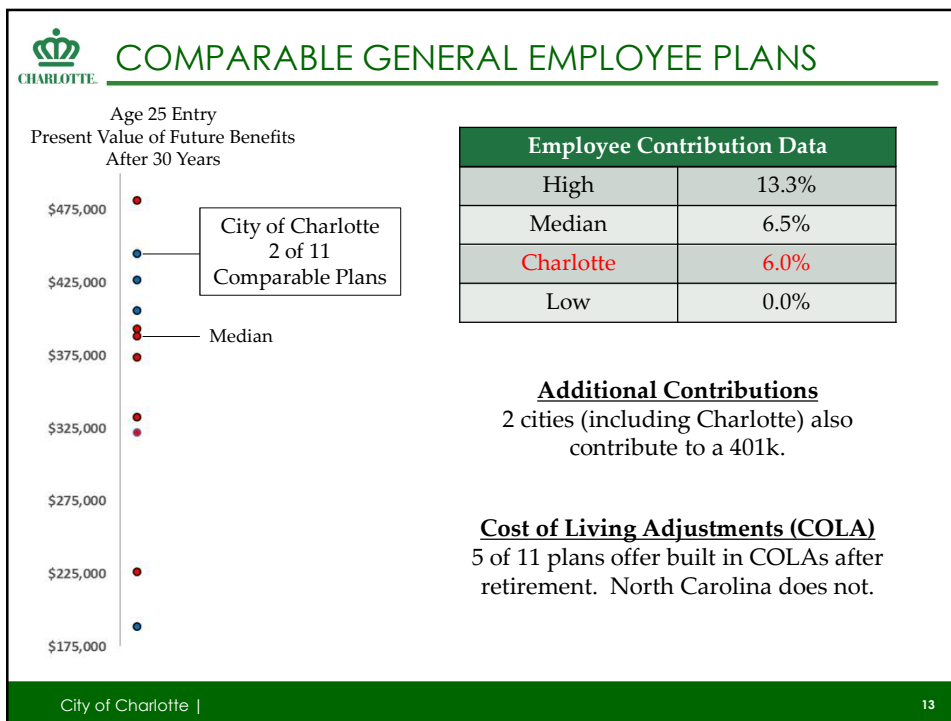
Number of Cities By Type of Plan and Employee Type			
Type of Retirement Plan	General Employee	Fire	Police
Pension Plan (replaces Social Security)	3	10	10
Pension Plan (no Social Security impact)	11	6	7
Hybrid Pension and Defined Contribution	2	0	0
Cash Balance Plan	2	2	2
Defined Contribution Plan	2	2	1

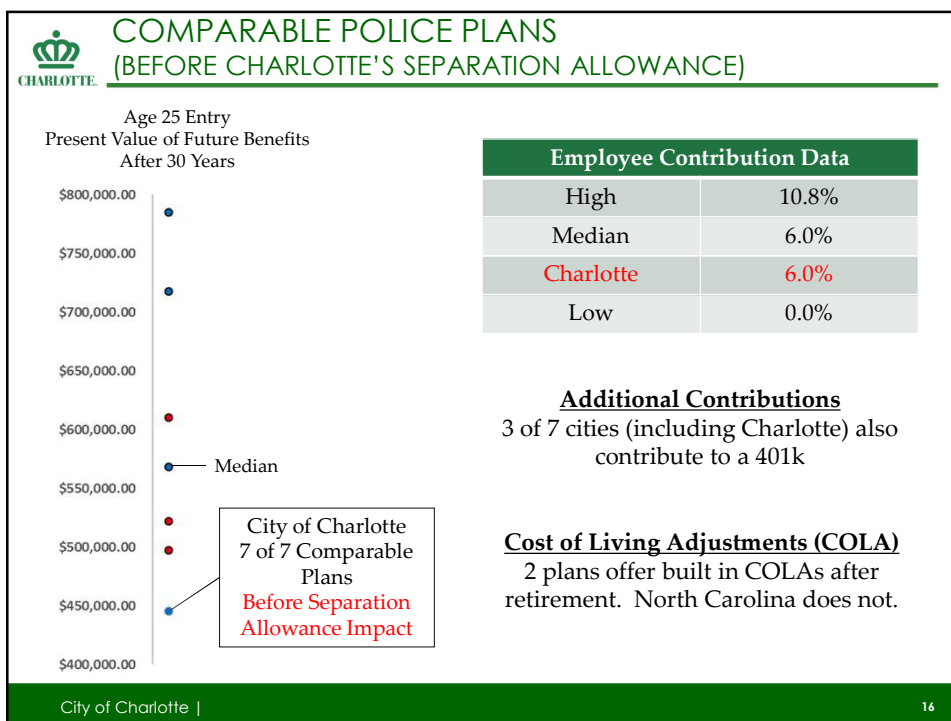
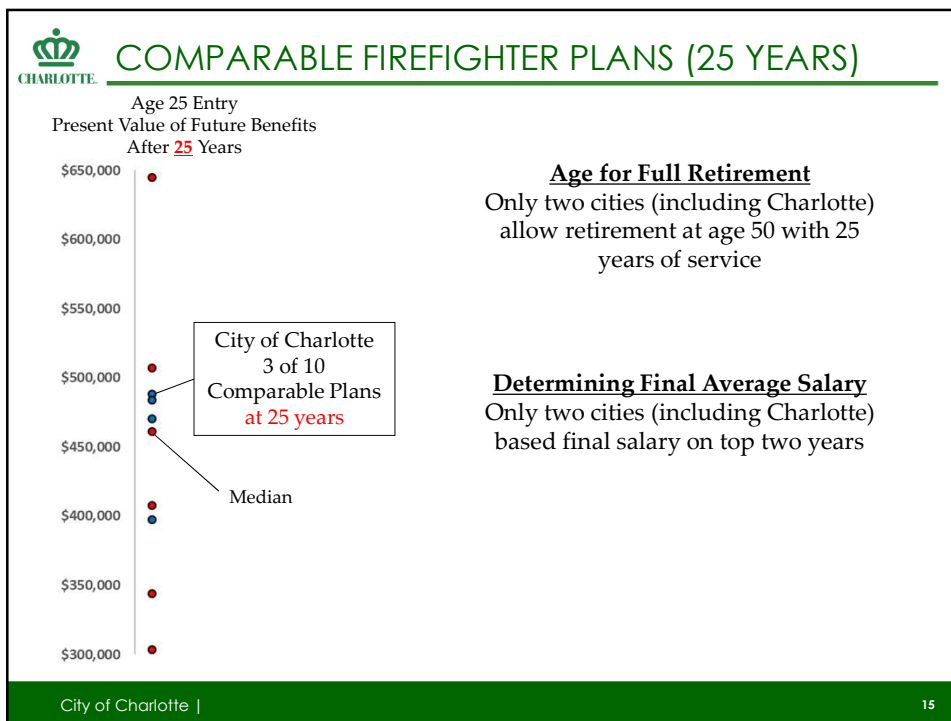
 Type of plan with City of Charlotte employees

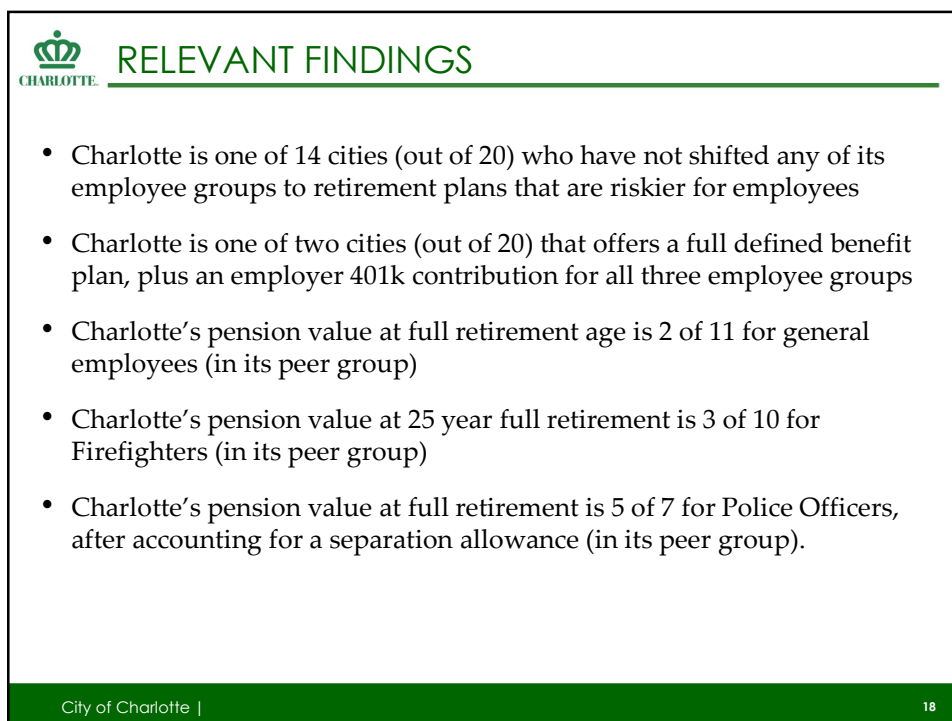
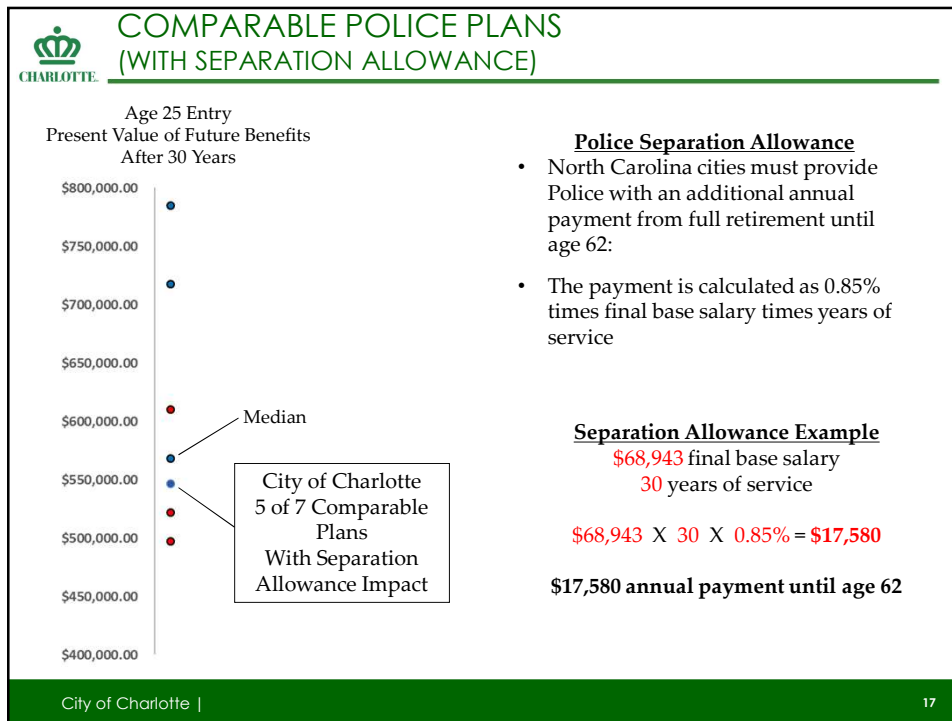


COMPARISON BY ACTUARY

- Analysis of the retirement plans of 20 cities (including Charlotte) conducted by Cavanaugh Macdonald Consulting, LLC
- The present day value of future benefits was actuarially determined for all pension plans
- The plan liability of a 25 year old employee who retires after 30 years is compared across plans in the following slides
- The study assumes the same rate of pay for all plans.









Benefits Update

City Council Budget Workshop

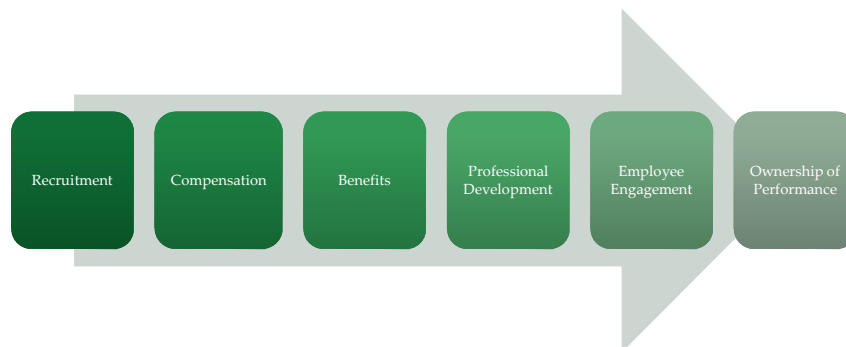
April 3, 2019

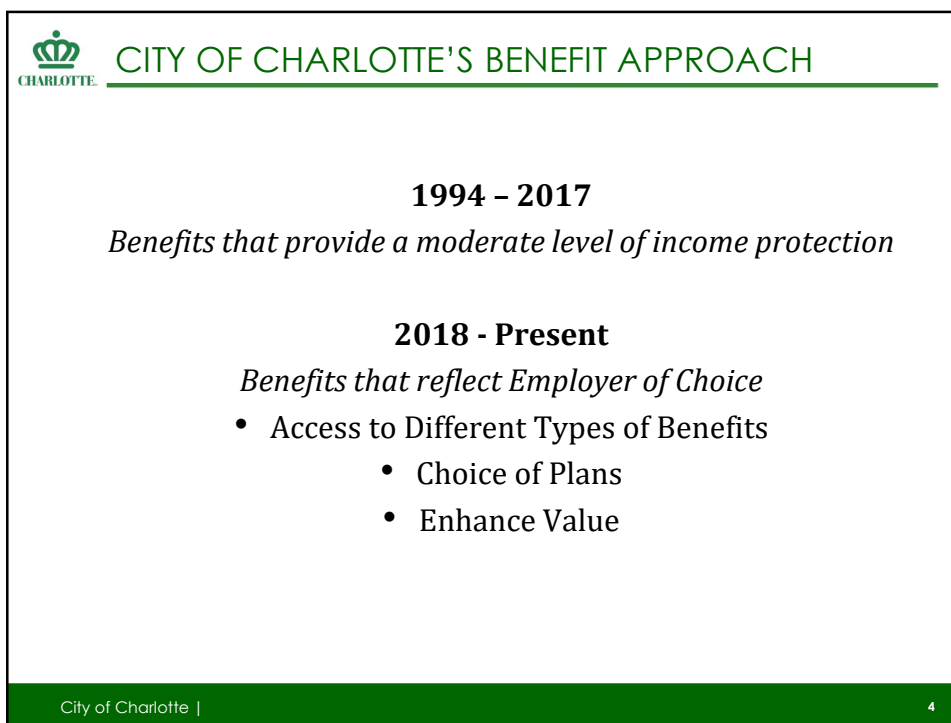
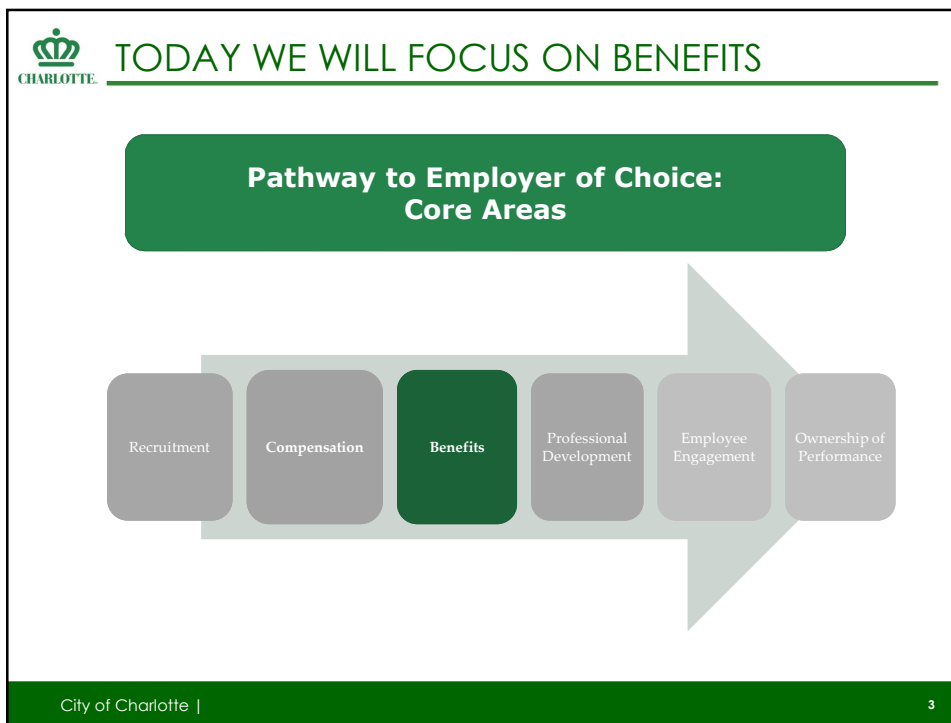


BECOMING AN EMPLOYER OF CHOICE

Targeted focus on six inter-connected facets of organizational culture

Pathway to Employer of Choice: Core Areas







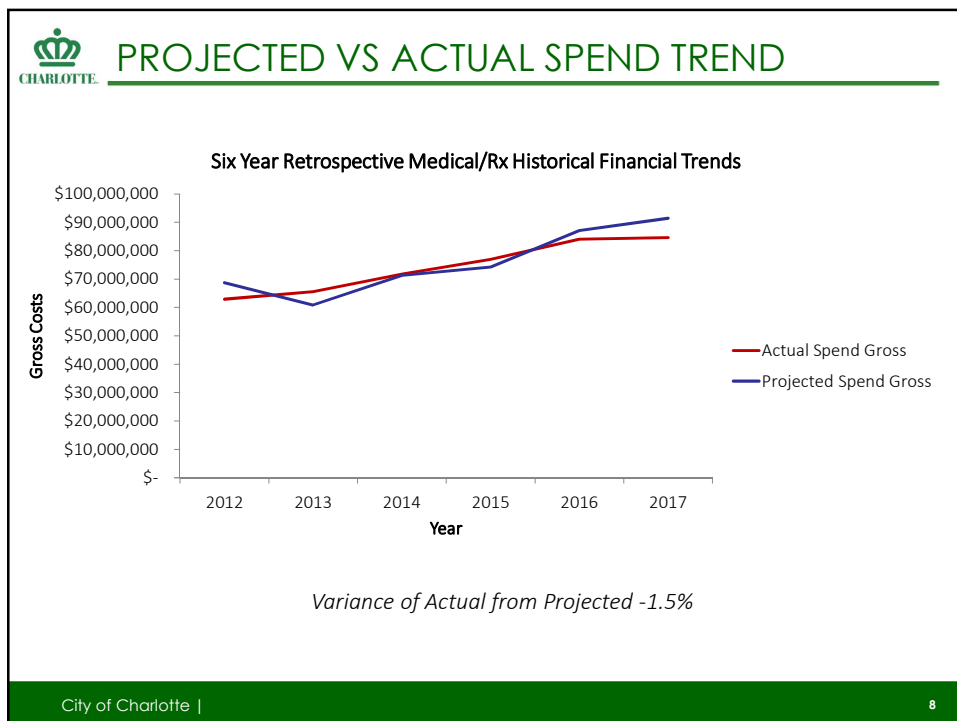
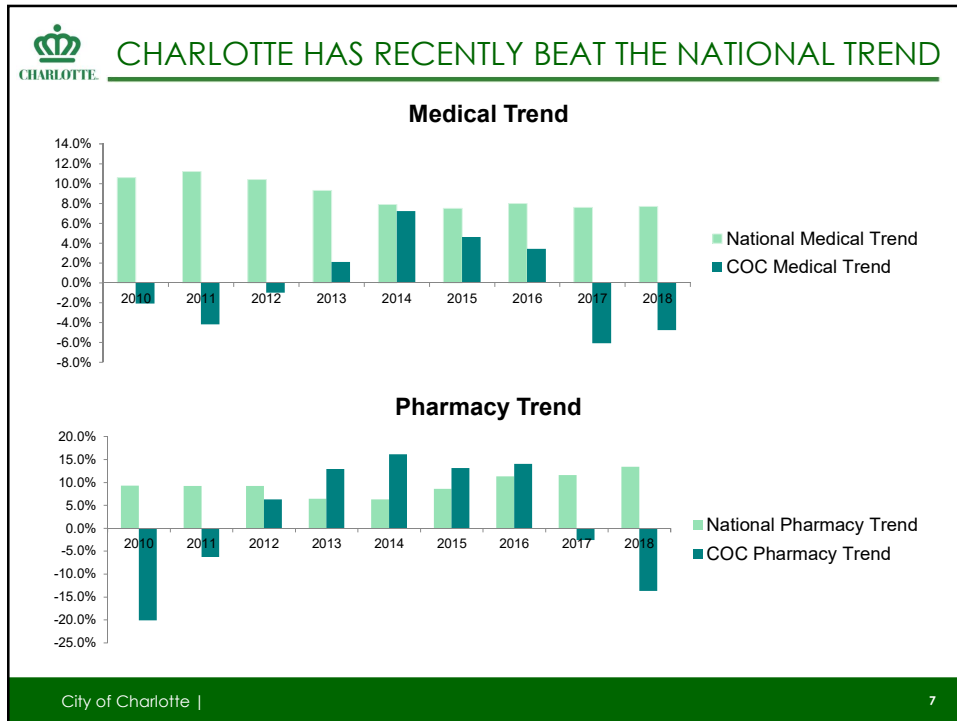
WHAT BENEFITS WE OFFER

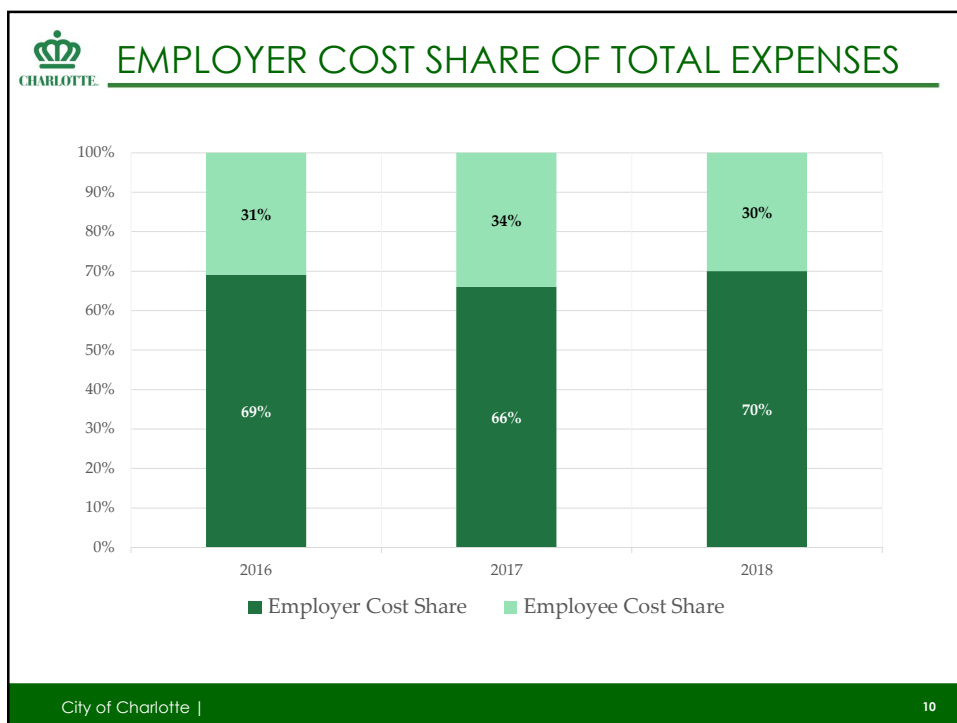
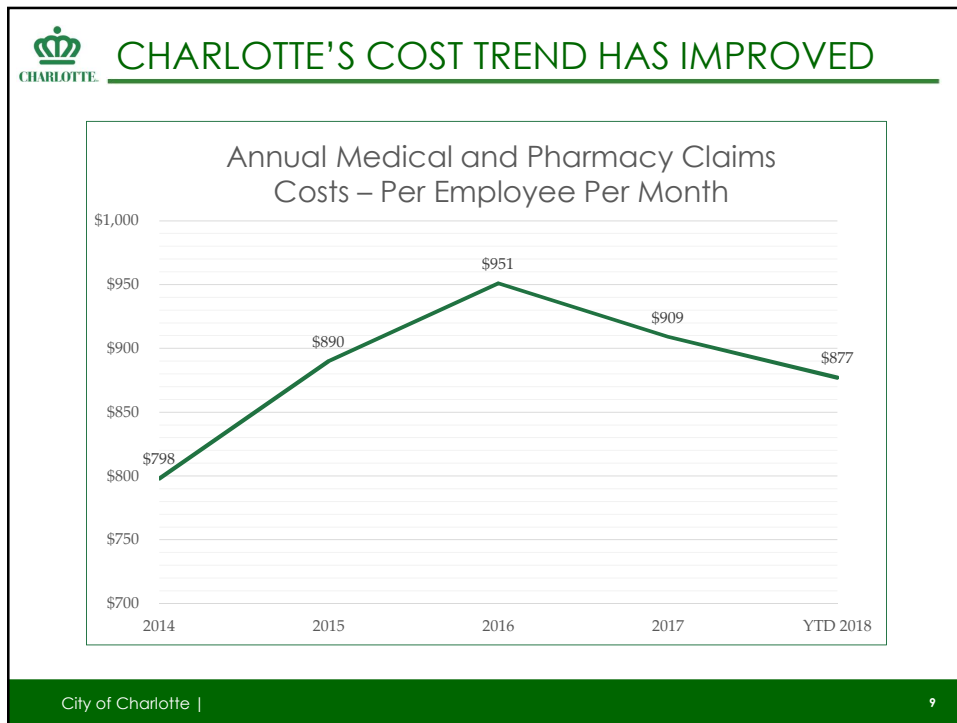
Employees have a variety of benefit choices

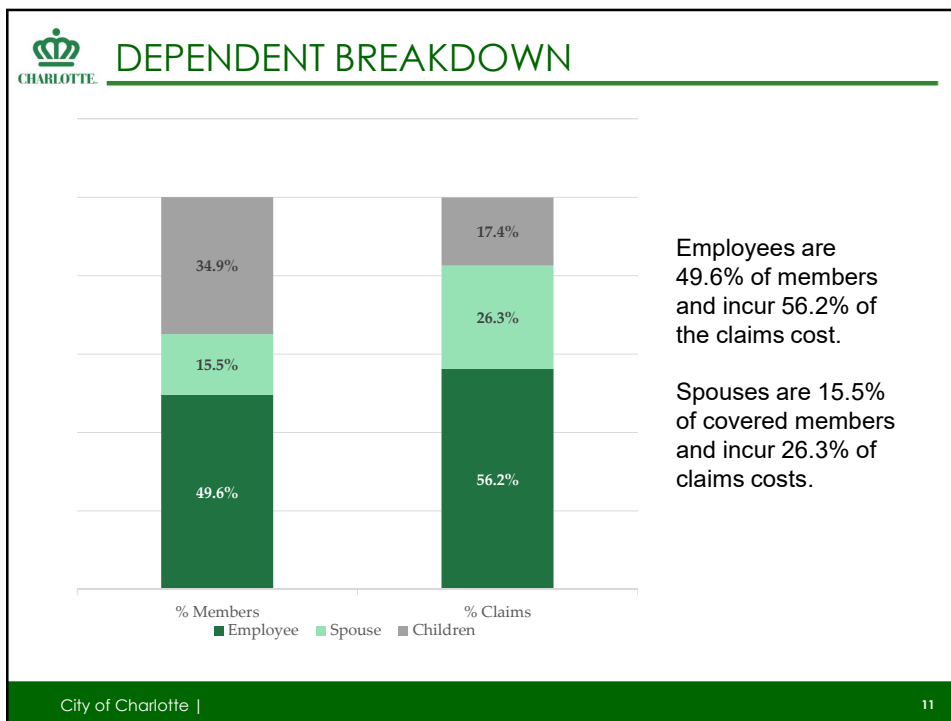
City Supported Benefits
Medical Insurance
Prescription Drug Insurance
Health Clinics
Dental Insurance
Health Savings Accounts
Vision Insurance
Basic Life Insurance
Employee Assistance Program
Short-Term Disability
Fitness Facilities
Wellness Program
Diabetes Program with Free Supplies
401 (k)
Leave
Retirement

Voluntary Benefits 100% Employee Paid
Accident Plan
Hospital Indemnity Plan
Critical Illness Plan
Supplement and Dependent Life Insurance
Whole Life Insurance
Long-Term Disability
Flexible Spending Accounts
457 Plans

HEALTHCARE







MYCLINIC

MyClinic – Access to high quality primary care at no cost to employees

- Enhanced patient experience
- Improved management of chronic conditions
- Opportunity to redirect care from expensive and inappropriate settings
- Improved health outcomes
- Reduction in lost work time and absenteeism

The image shows a digital display with the text 'OurHealth' at the top, 'Well made simple.' below it, and 'welcome.' in large white letters. At the bottom, it says 'City of Charlotte'.

City of Charlotte | 12



MYCLINIC SERVICES

Primary & Urgent Care

Preventive care
Care of colds/flu, sprains/strains, rashes
Suture removal, wound care, minor injuries
Public safety physicals



Pediatric Care

Children 3+ years old
Sick care
Minor injuries: cuts, bumps, bruises, sprains
Sports and camp physicals

Wellness

Flu shots
Fitness & nutrition consults
Tobacco cessation
Life coaching
Diabetes management
Health coaching



General Labs

On-site general blood and urine labs
Outside lab orders allowed from other providers



Medications

100+ common acute/maintenance medications

All services are available to employees, non-Medicare eligible retirees, spouses, and dependents covered by our medical plan. Most services are FREE.



WHAT DOES SUCCESS LOOK LIKE

Four questions that drive performance and outcomes for MyClinic.

1. *If we make this investment, will people use the clinic?*
2. *If people use it, will they have a superior experience?*
3. *If people use it and have a good experience, are health metrics improving?*
4. *If health metrics are improving, is there a savings?*

Expected savings to take 3-5 years.



IMPACT OF MYCLINIC ON MEDICAL COSTS

Health Plan Savings

City Savings	2016	2017	2018*
Clinic Costs	\$3,804,433	\$4,632,314	\$4,556,748
Health Plan Cost Avoidance	\$3,375,191	\$4,415,404	\$4,694,611
Net Savings	-\$429,242	-\$216,910	\$137,863

Health Plan Cost Avoidance = the cost to the plan if 85% of the clinic claims had been processed in another setting (doctor's office, urgent care, emergency room, pharmacy, laboratory)

Employee Savings

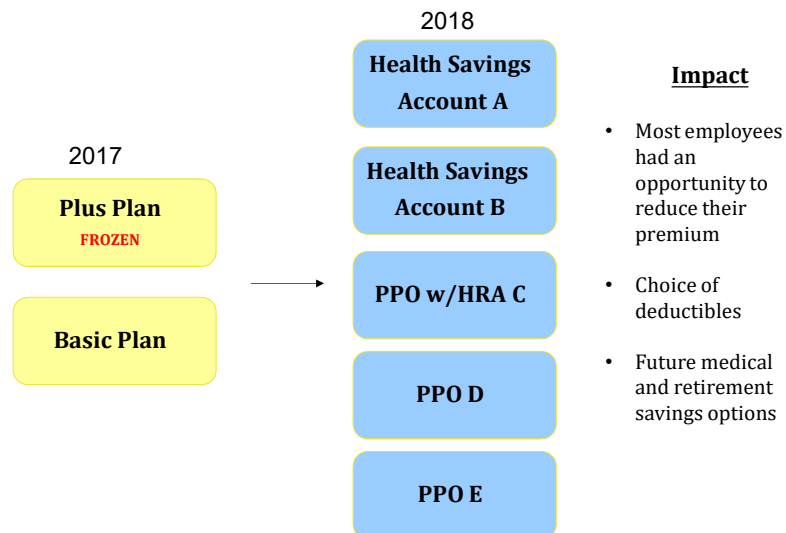
Employee Savings	2016	2017	2018*
Clinic Payments	\$0	\$0	\$12,552
Member Cost Avoidance	\$585,193	\$837,740	\$1,416,809
Net Savings	\$585,193	\$837,740	\$1,404,257

Savings projected in 2015 did not include changes to medical plan design. In 2018, five new plans were introduced, including health savings accounts.

* Health plan data is January - October



MEDICAL PLAN CHOICES





ADDED VALUE THROUGH DIVERSE CHOICES

Employees can choose:



- **MyClinic** – Provides free healthcare and medications
- **Health Savings Accounts with City Contributions** – Used to pay for medical expenses now and in the future. Also pay for services not covered by the plans.
- **Voluntary Benefits (Accident, Hospital Indemnity, Critical Illness)** – Pay cash to help employees pay for medical expenses.
- **Wellness Works Program** – Helps employees get healthy and stay healthy through health coaching, life coaching, chronic condition care management and more.

COMPARISON TO PEER CITIES



COMPARABLE PEER CITIES

Arlington, TX	Louisville, KY
Atlanta, GA	Memphis, TN
Austin, TX	Minneapolis, MN
Columbus, OH	Nashville, TN
Dallas, TX	Omaha, NE
Denver, CO	Portland, OR
Fort Worth, TX	San Diego, CA
Houston, TX	Seattle, WA
Indianapolis, IN	Tulsa, OK
Kansas City, MO	Mecklenburg County, NC*
Long Beach, CA	Raleigh, NC*

* These do not meet the comparison city criteria, but were added as they are regional comparisons



COMPARISON METHODOLOGY

Actuarial Value (AV)- average share of medical spending that is paid by the plan, as opposed to being paid out of pocket by the employee. Does not predict out-of-pocket costs for any individual and does not consider premium cost-share.

Affordable Care Act (ACA) Tier	Actuarial Value
Bronze	60%
Silver	70%
Gold	80%
Platinum	90%



MyClinic

The value of MyClinic is not included in the AV. It is estimated the clinic increases AV by at least 4%.



VALUE OF CITY'S MEDICAL PLANS

Actuarial Value by Plan

In-Network Benefits	HSA Plan A	HSA Plan B	PPO w/ HRA Plan C	PPO Plan D	PPO Plan E
2018 Actuarial Value	74%	86%	75%	70%	82%
2019 Actuarial Value	74%	86%	75%	75%	82%

Enhancements were made to Plan D in 2019. However, the comparison study evaluated 2018 plans and the enhancements are not reflected in the study.

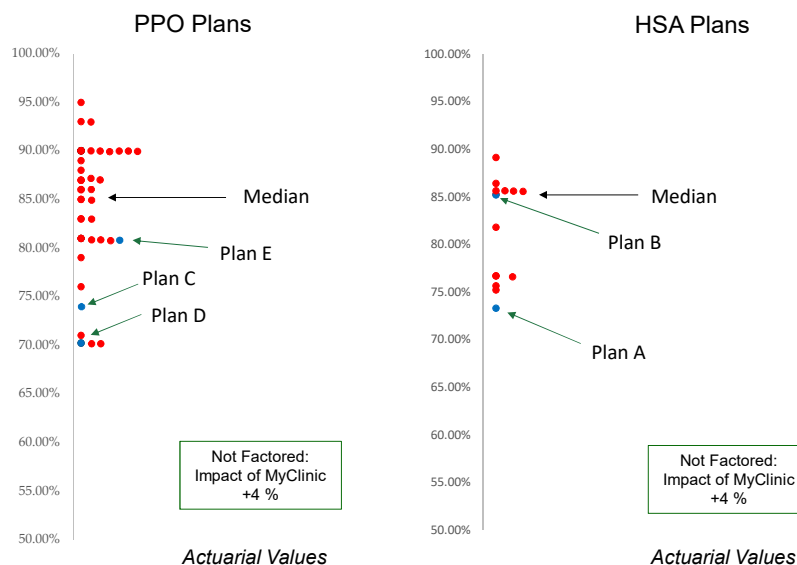
ACA Tier	Actuarial Value
Bronze	60%
Silver	70%
Gold	80%
Platinum	90%

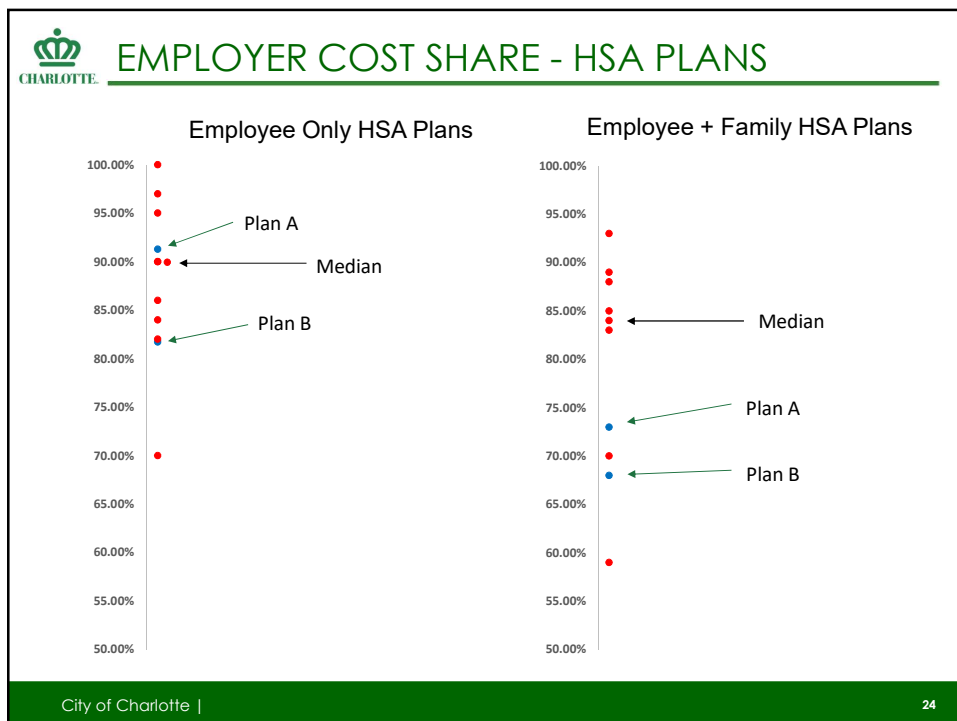
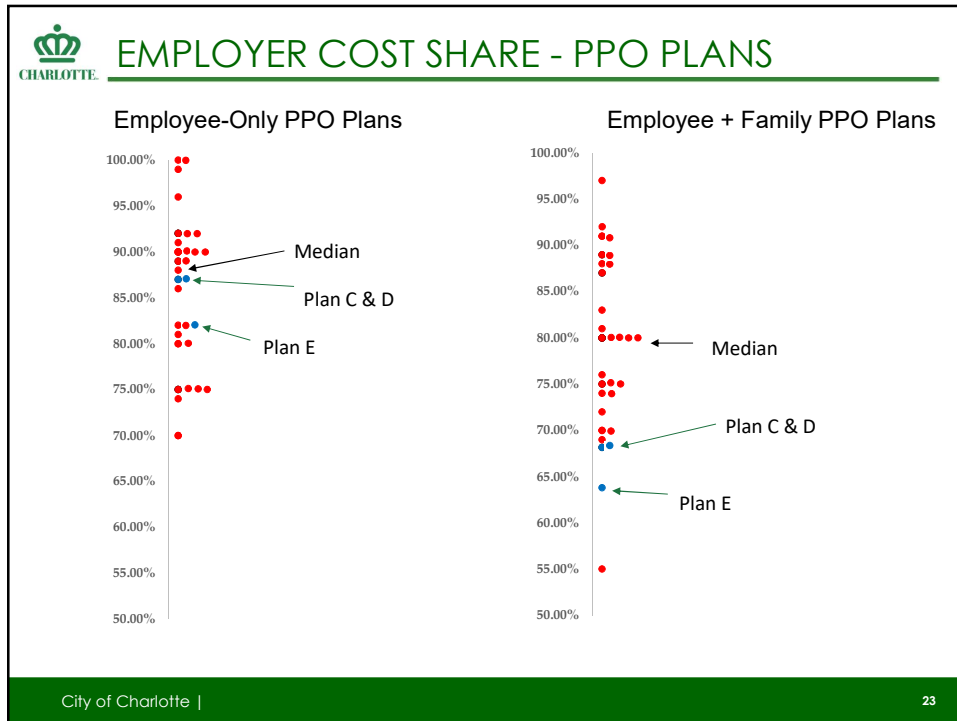
Value Not Included

- MyClinic Free Healthcare (+4% in AV)
- Hospital Indemnity Plans
- Accident Plans
- Broad Network (choice)



COMPARISON OF ACTUARIAL VALUE







VALUE ENHANCEMENTS IN 2019

The following value enhancements occurred in 2019 and are not reflected in the 2018 study:

2019 Plan Enhancements:

- No increase to employee premiums
- Reduced Deductible and Out-of-Pocket Maximum on Medical Plan D, improved the AV by 5 percent
- Reduced the Family premium of Plan E by 10 percent
- Added Behavioral Health and Clinical Advocate at MyClinic
- Comprehensive Firefighter Medical Exams

OTHER BENEFITS



DENTAL HIGHLIGHTS

- 9 of 20 cities (including Charlotte) provide an employer contribution to a dental plan.
- Charlotte's dental plan actuarial values:
 - Plus Plan 61%
 - Basic Plan 46%
 - Median of Comparable Plans 61%



SHORT-TERM DISABILITY

Short-Term Disability provides income protection to replace a portion of your income in the event sickness or injury prevents you from working for a period of time.

- Charlotte's is one of only three cities to pay 100% of a Short-Term Disability Benefit for employees.
- Charlotte's 2018 benefit was 50% of weekly earnings with a 7 day waiting period.



BASIC LIFE INSURANCE

Charlotte's Basic Life Insurance Benefit is 100% paid by the City

- All 20 cities in the study offer basic life insurance life, 19 cities pay 100% of the cost.

Charlotte's 2018 benefit was two times annual salary to a maximum of \$200,000

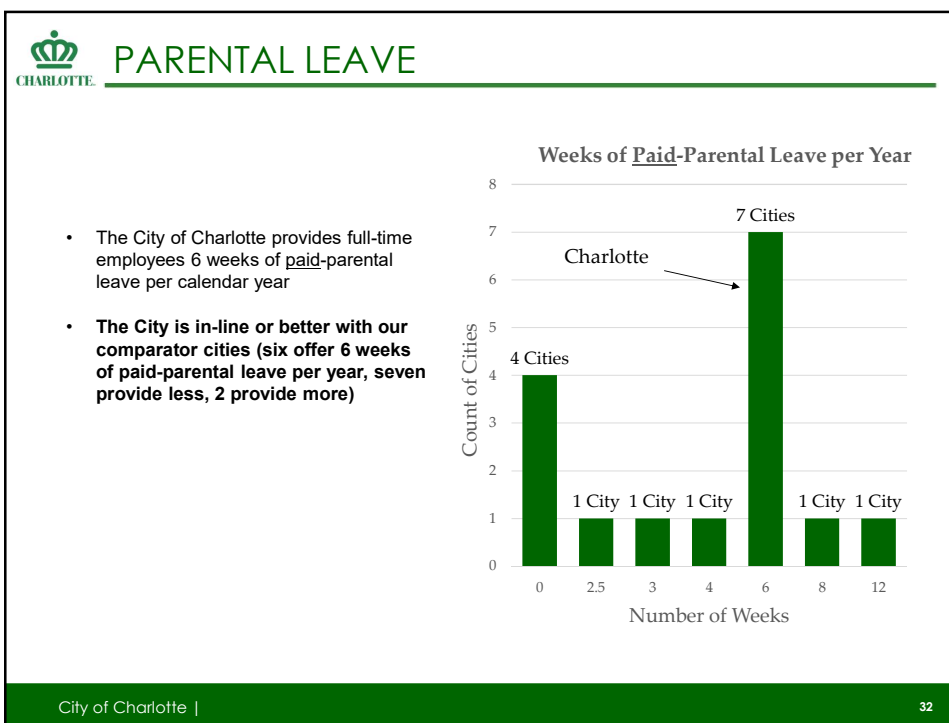
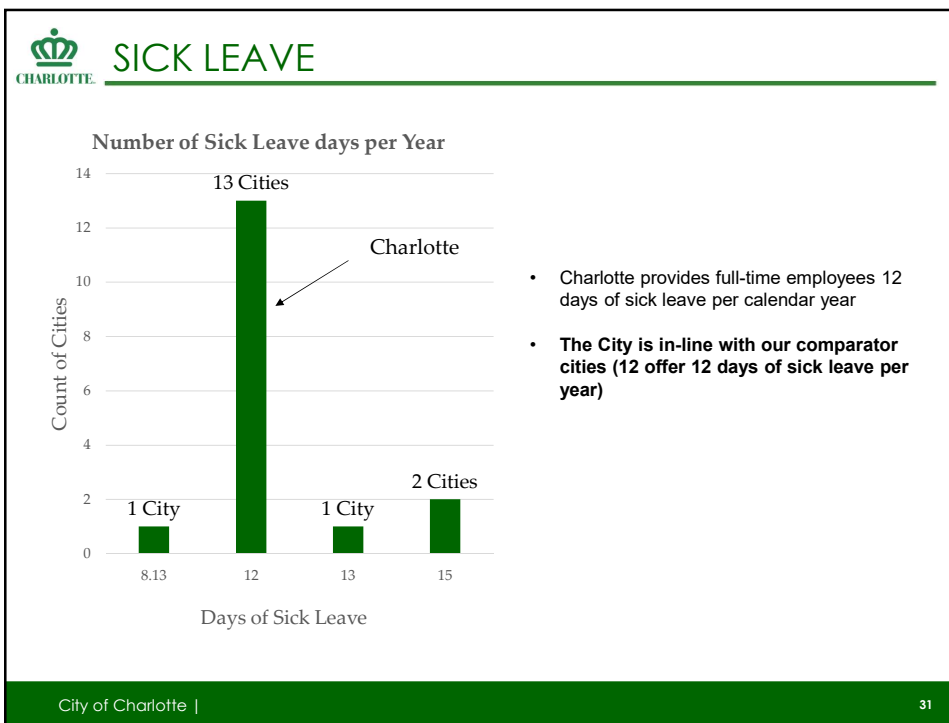
- Nine offer 1 times annual salary
- Two offer 1.5 times annual salary
- Three offer 2 times annual salary
- Five offer a flat amount ranging \$10,000-\$50,000
- Nine cities did not have a cap




VACATION LEAVE

Hours of Vacation Accrued per Year by City

Cities	Start of Accrual	10 Years	Max Accrual
Median=	80	144	208
Charlotte	80	144	160
City B	96	120	192
City C	80	144	192
City D	80	160	200
City E	91	111	160
City F	80	120	200
City G	96	128	240
City H	80	140	192
City I	80	144	200
City J	104	144	400
City K	120	144	184
City L	80	184	240
City M	80	140	200
City N	112	168	208
City O	80	128	160
City P	96	144	208

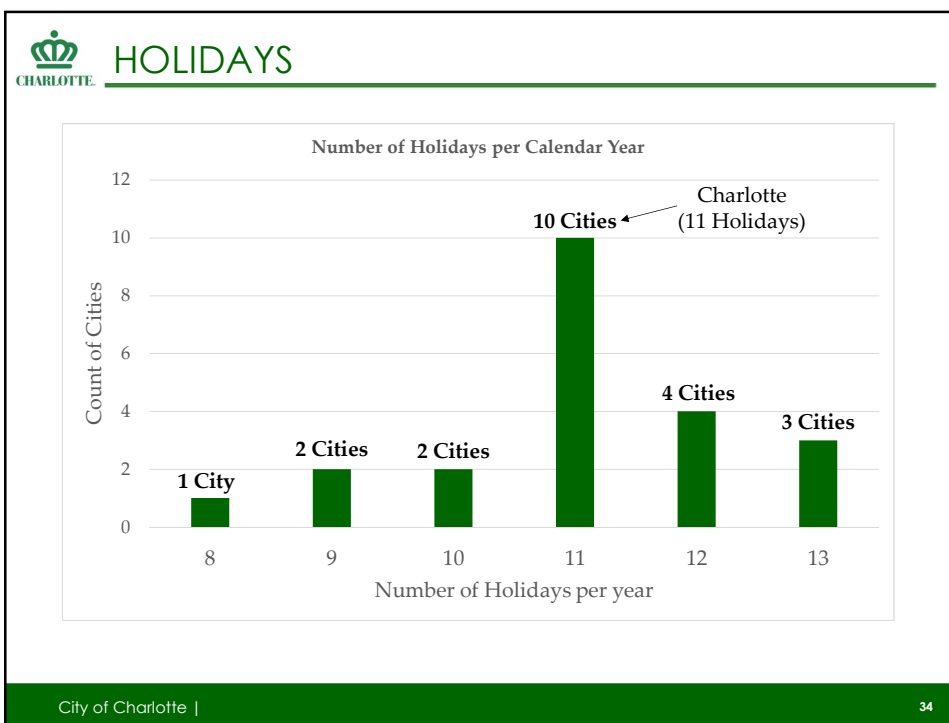




OTHER BENEFITS

- Tuition Reimbursement
 - 16 Cities (including Charlotte) offer tuition reimbursement
- Longevity Pay
 - 6 Cities offer longevity pay to new hires
- Transit Pass
 - 14 Cities (including Charlotte) offer transit discounts
- Buyback Opportunities
 - 8 Cities offer some level of buyback opportunities
- Childcare Programs/Subsidies
 - 6 cities offer a type of childcare subsidy or program
- Student Loan Forgiveness
 - 2 Cities offer Student Loan Forgiveness programs

City of Charlotte |
33





OVERALL STUDY FINDINGS

- According to 2018 data, Charlotte has some healthcare plans near the median and some below the median.
- The study design does not include MyClinic, 2019 plan enhancements or added value from Charlotte's wide-area network.
- Other employer paid benefits: life insurance, short-term disability, dental, holidays, leave are aligned or better than the peer cities.
- Charlotte's overall leave benefits are in line with Charlotte's peer cities.



FINDINGS AND CONSIDERATIONS

2020 Changes Being Evaluated:

- Enhance value of basic HSA plan (Plan A)
- Mitigate medical plan premium increases
- Elimination of Plan C due to lack of utilization
- Enhance dental plan options
- Dental plan enhancements
- Provide hearing loss benefit
- Review of city's leave incentive for unused sick leave
- Add additional voluntary insurance options
- Add 529 College Plan payroll deduction option



FY 2020 Financial Partners & Out of School Time Partners


Council Budget Workshop
April 3, 2019



FINANCIAL PARTNER- OVERVIEW

Overview

- **Financial Partners Summary and Timeline**
- **General Fund Financial Partners**
 - Discretionary
 - Dedicated Revenue
- **Housing and Neighborhood Services Financial Partners & Out of School Time Partners**



FINANCIAL PARTNERS SUMMARY

Financial Partners are contracted by the City of Charlotte to provide specific services which support key areas of focus for the City, contribute to community enrichment, and support departmental service needs.

There are four funding categories:


General Fund
Discretionary

Dedicated
Revenue
Sources

Federal Grant
Funds

PAYGO

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3



FY 2020 FINANCIAL PARTNER APPLICATION TIMELINE

- **October 2018:** The City of Charlotte's Financial Partners' Funding Request Application and resource links were posted on the City's website
- **December 2018:** Financial Partners' funding request applications were due to the City's Strategy and Budget Department
 - *Deadline was extended to January 2019*
- **April 2019:** Financial Partners' funding requests summaries presented to Council during the annual Budget Workshops
- **May 2019:** Funding recommendations will be provided as part of the City Manager's Recommended Budget
- **June 2019:** Council votes to approve Financial Partner funding as part of the Adopted Budget

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4



Financial Partners

General Fund: Discretionary



FY 2020 FUNDING REQUESTS

General Fund Financial Partners- Discretionary Funds

Agency	FY 2019 Budget	FY 2020 Request	\$ Change
Arts & Science Council	\$3,190,823	\$3,440,823	\$250,000
Charlotte Regional Business Alliance	158,250	161,526	3,276
Community Building Initiative	50,000	50,000	0
Safe Alliance <i>*This funding request is in addition to the FY 2019 one-time funding of \$49,000.</i>	382,552	445,613	63,061
TreesCharlotte <i>*This funding request is in addition to the endowment support of \$1.0 million.</i>	100,000	150,000	50,000
YMCA of Greater Charlotte-My Brother's Keeper	50,000	250,000	200,000
NEW FY 2020 FUNDING REQUESTS			
InTech Foundation, Inc.	N/A	60,000	60,000
Junior Achievement	N/A	35,000	35,000
Women's Business Center of Charlotte	N/A	50,000	50,000
TOTAL	\$3,931,625	\$4,642,966	\$711,337



Culture For All.

ARTS & SCIENCE COUNCIL

Mission Statement:

Ensuring access to an excellent, relevant, and sustainable cultural community for the Charlotte-Mecklenburg Region.

FY 2020 Funding Request: \$3,440,823

- Increase of \$250,000 from FY 2019 to support:
 - Enhance Cultural Vision Grants
 - Support Studio 345- Youth Development
 - General Operating Support



CHARLOTTE REGIONAL BUSINESS ALLIANCE

Mission Statement:

We enthusiastically collaborate to promote and advance the Charlotte region, creating opportunity, economic growth and prosperity for all.

FY 2020 Funding Request: \$161,526

- Increase of \$3,276 from FY 2019 to support:
 - Business development and marketing
 - Funding is based on population growth





COMMUNITY BUILDING INITIATIVE

Mission Statement:

To intensify the commitment and increase the capacity of individuals and organizations to build a more inclusive and equitable community.

FY 2020 Funding Request: \$50,000

- No funding increase requested. Funding request continues to support:
 - Access, inclusion, equity, social mobility, and economic opportunities in Charlotte-Mecklenburg
 - Supports the agency's signature leadership programs: Leadership Development (LDI), Leader Under 40 (LU40), and Community Bus Tours



SAFE ALLIANCE

Mission Statement:

The mission of Safe Alliance is to provide hope and healing to those impacted by domestic violence and sexual assault

FY 2020 Funding Request: \$445,613

- Increase of \$63,061 from FY 2019 to support:
 - Funding request increase is for an additional attorney position to provide legal services
 - Positions that collaborate with CMPD to support victims of violent crimes and their families





TREESCHARLOTTE

Mission Statement:

TreesCharlotte is a public/private nonprofit collaboration to grow, diversify and steward the city's iconic urban forest. Trained volunteers and science-based programs teach residents about the value of trees and how to plant and care for them.

FY 2020 Funding Request: \$150,000

- Increase of \$50,000 from FY 2019 funding to support:
 - The agency's strategy to plant 7,000 trees throughout the community with special emphasis on under-canopied neighborhoods
 - Preserving the urban forest by engaging citizens throughout the city to plant trees



YMCA OF GREATER CHARLOTTE- MY BROTHER'S KEEPER

Mission Statement:

YMCA: To put Christian principles into practice through programs that build healthy spirit, mind and body for all.

MBK-CLTMeck: My Brother's Keeper Charlotte-Mecklenburg is committed to improving outcomes for boys and young men of color by serving as the backbone organization of a collective impact effort.

FY 2020 Funding Request: \$250,000

- Increase of \$200,000 from FY 2019 funding to support:
 - Program activities that improve outcomes for young men of color between the ages of 10-21 by promoting career and college readiness
 - Program campaign, data dashboard development, volunteer trainings, Commercial Real Estate and Construction Pilot, and employer-oriented workshops for internship opportunities






CHARLOTTE



INTECH FOUNDATION, INC.







Mission Statement:

We envision a world where girls are creators of technology and leaders in the technology industry.

FY 2020 Funding Request: \$60,000

- New Funding Request to support:
 - InTech Academy –nine week technology program for high school aged girls teaching skills in coding, game development, mobile application development, and user-centered design
 - InTech Summer Program- five day summer camp for middle school aged girls teaching website development

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13



CHARLOTTE



JUNIOR ACHIEVEMENT



Mission Statement:

Junior Achievement of Central Carolinas inspires and prepares young people to succeed in a global economy through programming in financial literacy, workforce development, and entrepreneurship.


FY 2020 Funding Request: \$35,000


- New Funding Request to support:
 - JA BizTown Program- Fifth grade students participate in twelve guided simulations that teach basic business and budgeting practices while developing soft skills






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14





WOMEN'S BUSINESS CENTER OF CHARLOTTE







Mission Statement:

The Women's Business Center of Charlotte is to promote self-sufficiency through entrepreneurship throughout its 12 County District and the Charlotte Combined Statistical Area with IMPACTFUL educational training opportunities that stimulate growth for small/women/minority & veteran businesses.

FY 2020 Funding Request: \$50,000

- New Funding Request to support:
 - Increased professional development training, lunch & learn sessions, and entrepreneurship workshops for small/women/minority & veteran businesses

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15



Financial Partners

General Fund: Dedicated Revenues

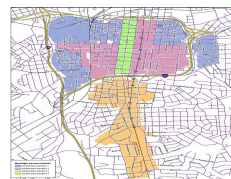


GENERAL FUND: DEDICATED REVENUE

There are two types:

1. Convention Center

- Revenue Sources: Occupancy Tax
Food & Beverage Tax



2. Municipal Services Districts (five districts)

- Revenue Source: District Property Tax



FY 2020 FUNDING REQUESTS

General Fund Financial Partners-
Dedicated Funds

Agency	FY 2019 Budget	FY 2020 Request	\$ Change
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Convention Center Funding

Charlotte Regional Visitors Authority (CRVA)	\$16,218,480	\$16,705,034	\$486,554
Charlotte Regional Visitors Authority-Film Commission	\$150,000	\$150,000	\$0

Municipal Service District Property Taxes

Charlotte Center City Partners	\$5,084,056	Presentation scheduled for April 8
University City Partners	\$752,149	Presentation scheduled for April 8

Mission Statement:

Embracing an inclusive, employee first culture, the CRVA is the trusted leader of Charlotte's visitor economy which evaluates community prosperity through destination-defining infrastructure, impactful branding and job growth.

▪ **FY 2020 Base Request: \$16,705,034**

- Total funding request is comprised of Occupancy Tax and Prepared Food & Beverage Tax revenues

▪ **Increase of \$486,554 over FY 2019 Base Funding**

- Increase determined by projected growth in dedicated prepared food & beverage and occupancy tax revenue
- Promotes the Charlotte region as a travel, convention, and tourism destination
- Conducts business development activities associated with tourism



Mission Statement:

Embracing an inclusive, employee-first culture, the CRVA is the trusted leader of Charlotte's visitor economy, which elevates community prosperity through destination-defining infrastructure, impactful branding and job growth

FY 2020 Funding Request: \$150,000

- No funding increase requested:
 - Promotes Charlotte Region as a location for film and commercial/television production
 - Provides site location, crew, equipment, stage, and support service information for commercials, independent films, television series, and still photography shoots





Housing & Neighborhood Services

Financial Partners and Out of School Time Partners



HOUSING & NEIGHBORHOOD SERVICES

Financial Partners FY 2020 Funding Requests

100% funded with Innovative Housing Funds

Agency	FY 2019 Budget	FY 2020 Request	\$ Change
Crisis Assistance Ministry	\$380,000	\$475,000	\$95,000
TOTAL	\$380,000	\$475,000	\$95,000

100% funded with Housing Opportunities for Persons with Aids

Agency	FY 2019 Budget	FY 2020 Request	\$ Change
Carolinas CARE Partnership	\$2,291,408	\$2,576,202	\$284,794
TOTAL	\$2,291,408	\$2,576,202	\$284,794



HOUSING & NEIGHBORHOOD SERVICES

Financial Partners FY 2020 Funding Requests

Shared Federal (CDBG/HOME) Funds and Innovative Housing Funds

Agency	FY 2019 Budget	FY 2020 Request	\$ Change
Charlotte Mecklenburg Housing Partnership, Inc. • Affordable Housing	\$1,860,000	\$1,960,000	\$100,000
Charlotte Mecklenburg Housing Partnership, Inc. • HouseCharlotte	\$231,000	\$281,000	\$50,000
TOTAL	\$2,091,000	\$2,241,000	\$150,000



CRISIS ASSISTANCE MINISTRIES

- FY 2020 Request - \$475,000
- Increase of \$95,000 over FY 2019 Funding
- Focuses on preventing homelessness and preserving dignity for the working poor
- Provides emergency rent and utility assistance together with counseling services and family support
- Clothing, household goods and furniture





CAROLINAS CARE PARTNERSHIP

- FY 2020 Request - \$2,576,202
- Increase of \$284,794 over FY 2019 Funding
- Provides Comprehensive AIDS Resources & Education
- Fosters a regional approach to prevent the spread of HIV and AIDS
- Provides housing assistance, HIV education & testing, services linking patients to quality medical care, and medical case management



CHARLOTTE MECKLENBURG HOUSING PARTNERSHIP

- FY 2020 Total Request - \$2,241,000
 - \$1,960,000 Affordable Housing (\$100K increase)
 - \$281,000 House Charlotte (\$50K increase)
- Increase of \$150,000 over FY 2019 Funding
- Expands affordable and well maintained housing for low-and-moderate-income families
- Training for first time homebuyers, foreclosure prevention, digital training and more



THE HOUSING
PARTNERSHIP



OUT OF SCHOOL TIME PROGRAM OVERVIEW

- City has supported Out of School Time (OST) since **1978**
- Process adheres to City Council policy updates made in May 2011, November 2012, October 2013, and November 2014
- Partners identified through biennial Request for Proposal (RFP) process
 - FY 2020 – FY2021 Out of School Time RFP was issued October 17, 2018
- OST RFP Evaluation Committee consists of members from:
 - Foundation For The Carolinas
 - Communities in Schools
 - MeckEd/Charlotte NEXT
 - City of Charlotte Staff
- 15% Public Service money from Community Development Block Grant helps fund OST Program



OUT OF SCHOOL TIME RFP PROCESS

- **October 17, 2018:** RFP for FY20 – FY21 contracts issued
- **January 2, 2019:** OST Providers submit final proposals
- **January 2 – 25, 2019:** Evaluation of Proposals
 - Review of Proposals submitted including program budget, financial statements, program goals, staffing experience, etc.
 - Site Visits
 - Staff Interviews
- **February 4, 2019:** Evaluation Committee meets to determine recommendation
- **April 2019:** Funding requests summaries presented to Council during the Budget Workshops
- **May 2019:** Funding recommendations provided as part of the City Manager's Recommended Budget
- **June 2019:** Council votes to approve funding as part of the Adopted Budget
- **September 1, 2019:** FY20 contract services commence



FY2020 – 2021 OUT OF SCHOOL TIME PARTNERS

Housing & Neighborhood Services Financial Partners:

Shared Federal & PAYGO Funds

Agency	FY18 –FY19 Budget	FY20-21 Amount Requested
A Better World		\$78,000
Arts & Science Council	\$200,000	n/a
Above & Beyond Students	\$157,934	\$200,000
Behailu Academy	\$66,000	\$72,000
Bethlehem Center		\$126,000
Charlotte Community Services Association		\$126,000
Greater Enrichment Program	\$200,000	\$200,000
Police Activities League	\$156,000	n/a
Prodigal Son Foundation		\$72,000
WINGS For Kids		\$200,000
YMCA Charlotte		\$96,000
YWCA Central Carolinas	\$200,000	\$200,000
	\$979,934	\$1,370,000

QUESTIONS & COMMENTS