AGENDA

Meeting Type:	W
Date	10-01-1990
SUBJECT	

City of Charlotte, City Clerk's Office

CHARLOTTE

MAYOR AND CITY COUNCIL WORKSHOP AGENDA

OCTOBER 1, 1990

MAYOR AND CITY COUNCIL
Workshop Agenda

October 1, 1990

4 00 p m - 5 15 p m	Retreat Planning - Discussion of Economic Development Priority Issue
5 15 p m - 6 30 p m	Retreat Planning - Discussion of Local Government Priority Issue

ECONOMIC DEVELOPMENT

CITY COUNCIL WORKSHOP

October 1, 1990

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INTRODUCTION

At the February 1990 Council Retreat, Council identified six issues on which they wished to focus their attention in 1990:

- Local government
- Public resources
- Crime and drugs
- Growth
- Education
- Economic development

Council has requested time to discuss Economic Development in greater detail at this workshop. After this workshop, City staff will prepare a policy paper for Council to consider at its November retreat as the basis for an action plan for Economic Development.

Council can guide this process by discussing the following items:

- What are we trying to accomplish? What are the opportunties?

- What is the City's role in relationship to the other participants in the economic development process?

- What is it Council would like to accomplish using its resources of leadership and consensus building, staff time, and money?

- What are constraints on City actions? What are ways to address them?

POLICY AND MISSION STATEMENT

In June of 1987, the Council approved a policy framework that established the City's Economic Development Department and provided guidelines for investing in public-private partnerships with certain revitalization funds.

The Economic Development Department, which began in December of 1987, is responsible for coordinating and trouble-shooting selected public-private projects, serving as key contact with the private sector and the Chamber, informing the public about economic development issues, performing research, developing new initiatives, and implementing any Council economic development policies.

Following creation of the Economic Development Department in 1987, the Council in August 1988 adopted an Economic Development Mission Statement as a guide for City activities. The mission statement included:

- Goal

  Provide for the economic growth and development of Charlotte to achieve economic well-being for all its citizens

- Mission

  Attract and support private sector investment by strategically using our resources to improve our capacity to develop, enhance the community's attractiveness to business and workers, and foster a healthy economic and business environment.

A FRAMEWORK FOR ECONOMIC DEVELOPMENT

Economic Development is the way a community uses its resources to create wealth for itself and achieve economic well-being for its citizens. Wealth is not merely financial wealth, but, broadly speaking, all that a community needs and desires.

How a community chooses to use its human, financial, educational, cultural, and natural resources determines the possibilities for continued growth and development.

Economic Development in communities has traditionally been focused on attracting new industry and supporting business growth. This often translates into creating jobs for people.

But as the world becomes more competitive, communities that have a high quality labor force - people for the jobs - will be in a stronger position to retain and attract business.

Although business decisions are sensitive to cost issues, these decisions increasingly turn on the quality of life a community offers and the prospect that this quality of life will continue.

Over the long term, the economic well-being of our citizens and a high quality of life depend on...

CONTINUED BUSINESS GROWTH	+	SUPPORTING HUMAN AND NEIGHBORHOOD DEVELOPMENT	+	MAINTAINING A LIVABLE AND SUSTAINABLE REGION

BUSINESS GROWTH	+	HUMAN AND NEIGHBORHOOD DEVELOPMENT	+	LIVABLE AND SUSTAINABLE REGION

Supporting business growth is the most familiar approach to economic development...

- It has tended to focus on attracting businesses that provide quality jobs for people;
- This has raised the level of economic activity in the region and led to increased growth.

The major strategies for achieving this growth are...

- The private sector handles business recruitment,
- And the public sector provides infrastructure.

The City has heavily invested in infrastructure to...

- Keep up with growth,
- But it has also tried to shape growth in underdeveloped areas, neighborhoods, and corridors.

Business growth has been very effective in creating high employment and labor participation rates indicating...

- That most of the skilled workforce already has a job,
- But this growth may not trickle down to help the lower skilled unemployed, the underemployed and those in the underclass who are no longer regularly seeking employment.

BUSINESS GROWTH	+	**HUMAN AND NEIGHBORHOOD DEVELOPMENT**	+	LIVABLE AND SUSTAINABLE REGION

As the economy changes from blue-collar manufacturing to services...

- Traditional blue-collar jobs are leaving the core city for suburbs and exurbs where land and a high quality workforce are available,

- But this leaves those in the urban core with service jobs that may pay up to 30% less than manufacturing.

While the City has strongly supported preparing people for jobs...

- Our programs can serve only about 5% of those eligible,

- And many of the needs of people to get ready for the world of work are outside the control of the of City.

The recent community needs survey shows that demands could exceed the City's resources and responsibilities...

- So, to change urban neighborhoods for the better, the City may need to seek new partners to help change individual and family lives for the better...

BUSINESS GROWTH	+	HUMAN AND NEIGHBORHOOD DEVELOPMENT	+	**LIVABLE AND SUSTAINABLE REGION**

If the growth of the Charlotte region continues in its current pattern...

- Some of the very qualities that make it desirable could be lost,
- And growth could kill growth.

But a regional ethos is emerging...

- That can be seen in political cooperation and regional efforts like the recent Urban Land Institute report.
- And this could lead to making Charlotte different and better than other metropolitan areas.

Each of these approaches can contribute to the economic development of our region...

BUSINESS GROWTH +	HUMAN AND NEIGHBORHOOD DEVELOPMENT +	LIVABLE AND SUSTAINABLE REGION
More businesses and quality jobs	Better people for jobs	Different patterns in the way the community develops

And help avoid some costly problems which could confront us...

CONTINUED BUSINESS GROWTH +	SUPPORTING HUMAN AND NEIGHBORHOOD DEVELOPMENT +	MAINTAINING A LIVABLE AND SUSTAINABLE REGION
The cost of infrastructure to keep up with growth	The cost in wasted lives, continuing social problems, and increasing drain on community resources	The loss in quality of life unless we change the ways we grow, commute, and consume resources

WHAT ARE WE TRYING TO ACCOMPLISH?

WHAT ARE THE OPPORTUNITIES?

- In Business Growth?

  Do we focus attention on specific geographic areas?

  If so, which?

- In Human and Neighborhood Development?

  Do we focus attention on specific geographic areas?

  If so, which?

- In Developing a Livable and Sustainable Region?

  Do we focus attention on specific geographic areas?

  If so, which?

WHAT SHOULD THE CITY'S ROLE BE IN RELATION TO THE OTHER PARTICIPANTS IN BUSINESS GROWTH?

CITY

- Infrastructure
  - Planning Commission - Business Corridor Revitalization Fund
  - Transportation
  - Charlotte Mecklenburg Utility Department
- Business Creation
  - Employment & Training
  - Women and Minority Business Enterprise
  - Community Development - Economic Development Loan Programs
- Capital Projects
  - Finance/Manager's Office - Stadium Convention Center
  - Economic Development - Performing Arts Center West Charlotte Business Incubator
  - Airport

AGENCIES RECEIVING CITY FUNDS

- CCA - Uptown promotion
- CUDC - Uptown development
- CCVB - Tourism
- Carolinas Partnership - Public/Private Regional Partnership

EDUCATIONAL

- UNC-C - Urban Institute
  - Ben Craig Center - Business Incubator
- Central Piedmont Community College
- Johnson C. Smith University

KEY AGENCIES

- Chamber of Commerce
- Metrolina World Trade Association
- Centralina Council of Governments
- Small Business Administration/SCORE
- Charlotte Minority Business Development Center
- Development Corporations
- Merchants Associations

IN HUMAN AND NEIGHBORHOOD DEVELOPMENT?

CITY

- Infrastructure
  - Planning Commission - Area Plan Capital Fund
    - Neighborhood Reinvestment Fund
  - Community Development - Housing Programs
- Employment Opportunities
  - Employment & Training

COUNTY

- Department of Social Services
- Health Department
- Mental Health Department

STATE

- Employment Security Commission
- Vocational Rehabilitation

EDUCATIONAL

- Charlotte/Mecklenburg Schools
- UNCC - Urban Institute
  - Mott Foundation Leadership Program
  - Ben Craig Center - Business Incubator
- CPCC
- Johnson C. Smith
  - West Charlotte Business Incubator

KEY AGENCIES

- United Way
- Chamber of Commerce
- Arts & Science Council Organizations
- Housing Authority
- NCNB Community Development
- Neighborhood Organizations

IN A LIVABLE AND SUSTAINABLE REGION?

CITY

Planning Commission - District Plans
Transportation
Charlotte Mecklenberg Utility Department
Airport
Parks

COUNTY

Environmental Protection Department
Parks and Recreation
Historic Landmarks Commission

REGION

Census Metro Area	ULI Metro Area
Mecklenburg	Mecklenburg
Rowan	Rowan
Cabarrus	Cabarrus
Union	Union
York	York
Gaston	Gaston
Lincoln	Lincoln
	Cleveland
	Iredell
	Stanley
	Anson
	Lancaster

KEY GROUPS

Chamber of Commerce
Centralina Council of Governments
Carolinas Partnership
Duke Power/Southern Bell/Other Utilities

WHAT ARE THE CONSTRAINTS ON THE CITY'S ACTIONS?

WHAT ARE WAYS TO ADDRESS THE CONSTRAINTS?

- In Business Growth?

- In Human and Neighborhood Development?

- In a Livable and Sustainable Region?

WHAT ARE POSSIBLE ACTION STEPS?

WHAT RESOURCES CAN THE CITY COMMIT?
LEADERSHIP? STAFFING? MONEY?

- In Business Growth?

- In Human and Neighborhood Development?

- In a Livable and Sustainable Region?

DESCRIPTION OF ATTACHED BACKGROUND MATERIALS

- On June 8, 1987, City Council approved an "Organizational Structure for an Economic Development Department" that identified responsibilities for an Economic Development Department that would be formed.

- Also on June 8, 1987, Council approved a "Policy Framework for Development and Revitalization Fund Loans and Public-Private Ventures" that provided guidelines for investments of certain revitalization funds.

- On October 16, 1987, Finance prepared a history of the City's role in economic development, beginning in the early 1960s, in preparation for the establishment of the Economic Development Department in December of 1987.

- On August 1, 1988, Council adopted the "Economic Development Mission for the City of Charlotte".

- The City currently funds economic development activity in several City departments and contributes to the funding of economic development activity in other agencies. This list provides information on City funding in greater detail.

- Mecklenburg County Human Services Quality Assurance Department examined human service needs by zip code for the county. The top 10 needs are presented in this summary for information about the particular needs in Charlotte's Westside.

- The report from the Equal Distribution of Resources Committee is included to present an additional perspective on Westside needs.

- In June 1990, the Urban Land Institute presented its findings on the "Charlotte Region". This ULI Report identifies regional economic development issues. (Bound separately.)

The Organizational Structure for
An Economic Development Department

Approved by Council
June 8, 1987

The Economic Development Department would be responsible for the following efforts:

1. Coordinating, monitoring and trouble-shooting economic development projects and contracts, including public-private venture proposals.

2. The key contact person and ombudsman for the City with the private sector, Chamber of Commerce, and other governmental agencies and non-profit groups on issues relating to economic development.

3. Developing new initiatives, incentive, and programs for economic development:

   a. Inventory and assembly of City-owned land to meet economic development objectives;

   b. Development and implementation of an ambassador program for small business;

   c. Coordinating a study process for re-use of the old Coliseum;

   d. Developing partnership proposals to meet the City's high priority economic development needs for upward mobile jobs, revitalization projects, and re-direction for growth.

4. Spokesperson for the City to promote and inform citizens on economic development issues.

5. Researching labor market needs, tax reform impact on economic development projects, innovative programs in other cities, etc.

6. Implementing the Economic Development Policy Plan once it is approved.

The responsibilities fall into two major categories:

1. Tasks that are not currently being done by any other department (numbers 3, 5, 6 above), and;

2. Tasks being absorbed by other departments with some negative impact on other workload (i.e. Coliseum re-use study).

This new department will focus responsibility for achieving new objectives in economic development in addition to relieving some workload in departments such as Planning and Community Development.

A Policy Framework for
Development and Revitalization Fund Loans
And Public-Private Ventures

Approved by Council
June 8, 1987

The following framework applies to: 1) loan proposals to be funded from the Development and Revitalization Fund (DARF); and 2) public-private ventures for economic development. The framework is not intended to be inclusive of public-private partnerships proposed for reasons other than achieving economic development (e.g., a performing arts center).

A. Public Purpose: The City of Charlotte will consider using public resources to invest in partnerships for the purpose of promoting economic development when such partnerships do not incur a negative long term liability on tax dollars and when such partnerships directly benefit one of the following targeted groups:

1. Low income, unemployed or underemployed County residents;

2. Minority and/or Women small business enterprises;

3. Unique or indigenous enterprises which the City Council determines are of significant economic value to the community.

B. Needs: The public-private partnerships must address one or more of the following needs:

1. Creation of jobs which have the potential for upward mobility, and for adequate pay which allows an individual or family to become self-sustaining.

2. Promotion of revitalization efforts in areas targeted by public policy to include but not be limited to:

   a. Enterprise areas from the 2005 Plan;

   b. The Pocket of Poverty;

   c. Approved area plans which include a commercial focus

3. Promotion of development projects which support redirection of growth policies.

4. Retention of unique or indigenous enterprise.

C. Evaluation Criteria: In evaluation of public-private partnerships and/or DRF loan proposals, the following criteria must be addressed. The evaluation will not be limited to these criteria:

1. Number and types of jobs created;
2. The plan for linkage between the jobs potential and City training program;
3. The City investment per job;
4. The return on City investment;
5. The risk to the City's investment and protection of investment by the financial agreements;
6. The "but for" provision which evaluates the likelihood of the project proceeding without City investment.

CITY OF CHARLOTTE
INTER-OFFICE COMMUNICATION

DATE: October 16, 1987

TO: Pam Syfert
Assistant City Manager

FROM: Richard D. Martin
Director of Finance

SUBJECT: *Economic Development*

The selection of Larry Rosenstrauch to be the Economic Development Director has prompted us to do some soul searching with regard to the general subject of economic development. In turn, our discussions led us to do some homework regarding local government's involvement in economic development and Finance's part in that involvement. For Larry's benefit we are providing the highlights of what has been an evolutionary process.

- EARLY 1960's. Involvement of the Finance Department in economic development can be traced to this period. In the early 1960's, because of comparatively strict state statutes and limited business opportunities, local economic development activity centered around the leveraging of City funds to take advantage of available federal and state grants. Important elements of these initiatives included:

  - Purchasing and clearing blighted areas, constructing essential infrastructure, and subsequent reselling to private enterprise.

  - Constructing publicly owned facilities and infrastructure; it should be noted that such initiatives were often undertaken for reasons that went beyond economic development goals.

  - Establishing enterprise concepts for the airport and utilities thereby enabling the development of effective financial strategies and structures for their timely expansion. Finance played an instrumental role in the development of these strategies.

- MID 1960's - LATE 1970's. The City's role during this period can best be viewed as continuing to attempt to leverage resources by putting up a limited amount of City funds in order to receive significant amounts of federal funding via the Urban Redevelopment program. The end result permitted the City to take timely advantage of a unique opportunity to set a new direction and pace in the central business district, and to serve as a catalyst for private sector investment in the uptown area. Perhaps the earliest major initiative by local government to carry out a joint public-private sector economic development venture was the NCNB-Radisson Hotel project on the Square. It was with this project that Finance involvement escalated from that of a major supporting discipline to that of principal architect in the formulation of financial economic development strategies. Another major series of events in which Finance was heavily involved was taking place concurrently, namely extensive planning for the airport's growth. The City recognized in a timely fashion that its continued development would hinge in significant measure on the success and growth of its airport. It was during this

period that a sound airport financial structure was put in place; this financial structure has since served as a model for many other cities. It made possible an aggressive pattern of growth in response to a burgeoning need which continues to this day.

- LATE 1970's TO PRESENT. This period has seen the role of Finance evolve beyond that already described, namely to one best described as hands-on leadership in the planning and negotiation of major public-private ventures. The relaxation of state-imposed constraints and the infusion of private sector uptown activity gave the City the latitude to increase its role in economic development. By serving as a "tax-exempt pass-through", the City made possible a reduced cost of capital to the private sector thereby fostering housing development in the Fourth Ward. It should be noted that the City also realigned its infrastructure priorities to support the Fourth Ward initiative. In the last several years the City has played its economic development role along a broad front ranging from "full partnership" ventures (e.g., Cityfair), to "limited partnership" ventures (e.g., Trademart), to "infrastructure partnership" (e.g., Woodland Business Park), to being the lessor of land (e.g., of the old Fire Academy to the Outdoor Adventure Center), to the sale of land (e.g., many parcels acquired under Urban Redevelopment), to providing loan packaging support/services (e.g., for the SBA's CCDC/503 Program), to loaning development funds to Pocket of Poverty-related initiatives (e.g., via the Economic Development Revolving Loan Fund). In short the range of initiatives has been extremely diverse mirroring Council's broad interests.

By almost any yardstick, in the last 25 years the City's efforts in economic development have been substantial and noteworthy; moreover, the lessons of the past demonstrate that financial expertise and strategies have been the key elements in making these opportunities a reality. On the basis that the City will continue to play an active role in the economic development process, and will pursue its objective of leveraging its limited resources to the end of creating jobs, increasing the tax base and benefitting lower and moderate income citizens, the Finance function must continue to be central to the economic development process and not separate from or tangential to it. We are proud and pleased to continue to play this central role.

We look forward to Larry's arrival and to working closely with him as he pursues Council's and the Manager's economic development objectives.

mp

cc: Julie Burch, Assistant City Manager
Martin Cramton, Director of Planning
Larry Rosenstrauch, Incoming Economic Development Director
J. W. Walton, Community Development Director

Economic Development Mission
for the
City of Charlotte

Adopted by The City Council
August 1, 1988

1. **Need**:

Improve the economic well-being of the citizens of Charlotte by analyzing the economic forces at work and using our resources to harness them for the community's benefit.

Although Charlotte continues to grow, this growth is not uniform. Typical examples of locational and social disparities and other economic development concerns are:

- The 18 neighborhoods with the highest poverty rates had an average unemployment rate that was more than 2.5 times higher than the city-wide average (1980 Census).

- Ten percent of the City's labor force is estimated to be comprised of "working poor," those employed whose total family income falls below the poverty level (Employment and Training Department).

- Charlotte's rate of job generation, significant business start-ups, and percentage of young companies with high growth, ranks (32), below Atlanta (5), Raleigh-Durham (6), Nashville (11), Charleston (19) and Greensboro (28) when measured over the last four years (Inc. Magazine, 1988).

- City sponsored job training programs can only reach less than 5% of the 57,000 economically disadvantaged residents over age 16.

2. **Goal**:

Provide for the economic growth and development of Charlotte to achieve the economic well-being of all its citizens.

Attract and support the private sector investment that is essential to long-term economic growth.

3. **Mission**:

The City's economic development mission is to attract and support private sector investment by building on the economic strengths of Charlotte through strategic actions that affect our city's:

- Capacity to develop
- Attractiveness to existing and potential business investors
- Economic and business environment

These three elements insure a positive climate for private sector investment necessary to support expansion of the tax base, growth of high quality jobs, and the creation of wealth in the community.

4. **Mission Elements**:

The City of Charlotte, through its provision of services and well designed infrastructure, already has a strong commitment to investment in economic development. Our challenge is to strategically use the City's resources to influence key elements to shape a bright economic future for Charlotte.

A. Charlotte's Capacity to develop is influenced by these elements:

- Infrastructure and government services that provide the framework for the economy and its growth

  Examples: Airport, roads and transportation, water and sewer, and land use planning

- Human Resources

  - Labor force quality and availability

    Examples: Skills training programs, OJT programs, dropout programs, and summer youth programs

  - Leadership capability of individuals and organizations to provide vision and create consensus/coalitions for action

    Example: Bond program and priorities

- Management capability to efficiently use resources

  Examples: Productivity studies, innovative management

- Capital

  - Dollars available for business start-up and expansion

    Examples: City loan funds that leverage private investment

  - Businessmen and women such as bankers, lawyers, and accountants who understand the changing economy and can affect business investment decisions accordingly

- Natural Resources

  - Available land, water and minerals

- Existing businesses which set the stage competitively for business attraction, formation, expansion, and retention decisions

- Technology and information resources available to public and private sector

  Examples: Government Access Channel and Discovery Place.

B. <u>Charlotte's Attractiveness to businesses and to workers is influenced by these elements</u>:

- Quality of Life - cultural, recreational, and educational opportunities

  Examples: New Coliseum for basketball, developing greenway system, and Performing Arts Center.

- Image of the city

  - Pride citizens have in Charlotte

  - The way the city is presented to others through personal and media contact

  Examples: Marketing program, City graphics program, and taxi service

- Environment - clean air, water, climate
- Places
  - Uptown identity and activity
  - Neighborhood vitality
  - Diversity of business districts and shopping areas

    Examples: Municipal service districts, business corridor revitalization program, and zoning

C. <u>Charlotte's Economic and Business Environment is influenced by these elements</u>:

- Support for business formation, expansion and attraction

  Examples: Assistance with business incubator, and ombudsman help through City

- Public - private cooperation and commitment

  Examples: City-Chamber of Commerce projects, and public-private partnerships such as Cityfair and Trade Mart

- State and local regulatory and taxation roles
- State/City/University/Regional roles and relationships

5. <u>**Some Current Strategies**</u>:

- Stimulate business investment and retention by maintaining a strong commitment to quality City services and infrastructure.
- Anticipate and guide growth in newer areas such as Northwest-University area by careful land use, capital and economic development planning. Place the jobs in targeted areas to attract people.
- Invest in training programs for the poor and working poor to increase their self-sufficiency and to improve the overall quality of the labor force.
- Encourage climate of self-study and innovation by City departments to eliminate barriers to business formation, expansion, and attraction.

- Recognize the interdependence of Charlotte and the region. Provide leadership to plan and organize regional economic development.

- Cooperate with the Chamber of Commerce's business development activities.

- Use the City's resources to stimulate private sector investment through the formation of effective public-private partnerships.

- Provide capital for business start-up and expansion on the basis of demonstrated need, potential for job creation, and ability to achieve public goals.

Lr7-4

CITY FUNDED ACTIVITIES

- Economic Development

  Responsible for coordinating and trouble shooting public-private projects (Performing Arts Center, Cityfair, West Charlotte Business Incubator), serving as key contact with the private sector, the Chamber, CUDC, and CCA, informing the public about economic development, performing research, developing new initiatives, and implementing any Council economic development policies.

- Planning Commission

  Business Corridor Revitalization Fund - For streetscape improvements to five commercial corridors: $6,000,000.

  Area Plan Capital Fund - For implementation of projects identified in the Area Plan: $500,000/year.

  Neighborhood Reinvestment Fund - For infrastructure improvements for low income neighborhoods: $8,000,000.

- Employment and Training

  Provides assessment, basic education, skills training, and research services. Supports Chamber recruitment efforts through on-the-job training program. Runs summer youth employment program.

- Women and Minority Business Enterprise Program

  A part of the Purchasing Division, the WMBE Program has established a comprehensive database to assist women and minorities in the City's procurement and construction programs. Annual Budget $88,424.

- Community Development

  To preserve the city's housing stock and develop new housing resources and employment opportunities for Charlotte's low and moderate income citizens. Program opportunities to promote business expansion and create jobs include:

  Development and Revitalization Fund (DARF)
  Loans available for new construction, rehabilitation or expansion of industrial or commercial projects in the four redevelopment areas and the "Pocket of Poverty": $3,115,000.

  Charlotte Certified Development Corporation (CCDC)
  The CCDC is a non-profit corporation established to help small businesses secure long-term financing for capital improvements by working cooperatively with local banks and lending institutions.

  Economic Development Revolving Loan Fund (EDRLF)
  This fund provides 6% interest rate loans to individuals and businesses located primarily in low income areas of the City.

  Belmont Neighborhood - a holistic approach to reviving Belmont with an emphasis on housing rehabilitation: $200,000.

- Manager's Office/Finance

  Coordinate major capital projects. NFL Stadium $35,000,000. New Charlotte Convention Center $150,000,000. Charlotte Apparel Center.

- Charlotte Uptown Development Corporation

  To promote investment in Charlotte's uptown. Projects include support for the NFL Stadium, the Convention Center, uptown residential development, employee transportation and parking: $327,000.

- Central Charlotte Association

  To promote and market the Tryon Street Mall. To maintain and expand commercial, retail, and entertainment uses in downtown: $360,000.

- Charlotte Convention and Visitors Bureau

  Promote tourism and attract conventions and visitors to Charlotte: $1,467,200.

- Carolinas Partnership (formerly GCEDC)

  To market the city and region nationally. Support special projects such as the NFL franchise: $80,000.

MECKLENBURG COUNTY

Human Services Quality Assurance Department

TO: Larry Rosenstrauch, Director
Economic Development

FROM: Lynn McRae, Human Services Planner LM

DATE: September 4, 1990

RE: Top 10 Human Services Needs for Mecklenburg County Households

This memo comes in reference to your recent data request concerning the most prevalent human services needs among Westside households and "other" county households. Per our conversation, I have defined Westside households as those in zip code areas 28208, 28214 and 28216. "Other" households are those in all other zip code areas within Mecklenburg County. The following is a list unmet needs for each area in descending order:

WESTSIDE

NEED	# OF HSLDS.	% OF HSLDS.
1 fears being victim of crime	6,453	22.5
2 needs help paying for health care	5,319	18.5
3 needs courses for career advancement	4,807	16.7
4 needs education past high school	4,062	14.1
5 needs help paying for health insurance	3,985	13.9
6 needs a job	3,506	12.2
7 needs courses for hobby	3,477	12.1
8 needs job that better matches skills	3,431	11.9
9 needs courses for high school diploma	3,422	11.9
10 needs education to improve writing skills	3,384	11.8

N = 28,739 HOUSEHOLDS

OTHER

NEED	# OF HSLDS.	% OF HSLDS.
1 fears being victim of crime	33,831	21.4
2 needs courses for career advancement	21,079	13.3
3 needs help paying for health care	14,605	9.2
4 needs education past high school	14,043	8.9
5 needs job that better matches skills	13,746	8.7
6 needs counseling for household finances	13,278	8.4
7 needs help with employment discrimination	13,164	8.3
8 feels lonely or isolated	12,511	7.9
9 needs courses for hobby	11,564	7.3
10 needs financial counseling for retirement	10,873	6.9

N = 157,921 HOUSEHOLDS

1200 Blythe Boulevard • Charlotte, North Carolina 28203 5816 • (704) 336 3426

1989 COMMUNITY NEEDS SURVEY
TOP HOUSEHOLD NEEDS IN DESCENDING ORDER

NEED	# OF HSLDS.
1 fear being victim of crime	40,285
2 needs education for career advancement	25,886
3 needs help with health care expenses	19,924
4 needs education past high school	18,104
5 needs job that better matches skills	17,177
6 needs counseling for household finances	16,470
7 feels lonely or isolated	15,202
8 needs education for hobby	15,041
9 experienced employment dicrimination	14,563
10 needs help with health insurance expenses	14,329
11 needs financial retirement counseling	13,414
12 needs transportation to recreation/entertainment	12,842
13 needs transportation to doctors/hospital	12,650
14 needs a job	12,436
15 needs help with utility bills	11,873
16 needs education to improve reading/writing skills	11,861
17 needs a job with more hours	11,462
18 needs household repairs	11,028
19 needs education for high school diploma	10,891
20 needs transportation to social services	10,779
21 needs daycare for sick children	10,732
22 needs help with depression/emotional problem	10,307
23 needs transportation to job	9,898
24 needs help with eyesight problem	9,821
25 has additional people needing own place to live	9,554
26 needs transportation for food shopping	8,940
27 needs help getting child support	8,784
28 needs education to live in U.S.	8,672
29 needs a tutor	8,658
30 needs transportation to job interview	8,339
31 needs money for rent	7,868
32 needs food for self or family	7,753
33 needs transportation to conference or PTA meeting	7,618
34 needs help with credit discrimination	7,509
35 needs afterschool supervision for child	7,233
36 needs transportation to adult education courses	7,149
37 needs help with hearing problem	7,038
38 needs daycare during normal working hours	6,719
39 needs role model for child	6,689
40 needs bereavement counseling	6,336
41 needs help with legal services	6,210
42 needs household goods	5,996
43 needs help with serious physical problem	5,920
44 needs help getting adequate housing	5,669
45 needs education to speak English	4,997
46 needs emotional counseling for retirement	4,687
47 needs clothing	4,390
48 needs help with social services discrimination	3,720
49 needs help with drinking problem	3,511

NEED	# OF HSLDS.
50 needs help with transportation discrimination	3,490
51 needs help with equal education discrimination	3,384
52 needs transportation for disabled	3,203
53 needs help with police/court discrimination	3,073
54 needs money for house payment	2,938
55 needs 2nd/3rd shift daycare	2,853
56 needs physical therapy at home	2,753
57 needs education for child with special needs	2,752
58 needs relief for home care provider	2,692
59 fears being hurt or abused	2,613
60 needs help with housing discrimination	2,501
61 needs help for elderly/disabled with chores	2,389
62 needs help getting veterans benefits	2,279
63 needs help with speech/language problem	2,044
64 needs family planning services	1,967
65 needs nursing care at home	1,894
66 needs counseling for being ex-convict	1,869
67 needs help for child with serious behavior problem	1,849
68 needs adult daycare outside the home	1,762
69 needs help with drug abuse problem	1,259
70 needs companionship for homebound	1,073
71 needs rape counseling	1,057
72 needs help with mentally retarded hsld. member	1,053
73 needs help for child with cooperation problem	940
74 needs help for child with truancy problem	661
75 needs prenatal care	355
76 needs help for child with runaway problem	214
77 needs help for child with delinquency problem	124

DRAFT REPORT AND RECOMMENDATIONS
EQUAL DISTRIBUTION OF RESOURCES COMMITTEE

INTRODUCTION

Beginning January, 1990 and continuing through July, 1990, a group of citizens from Charlotte and Mecklenburg County met to study the equal distribution of resources in reference to the westside of Charlotte-Mecklenburg.

The group took up a charge assigned to them by members of the Civic Index Stakeholders group who recommended that a "broadly-based citizens committee" conduct an indepth study of how public and private resources and services are delivered to every section of the community, determine if there is fairness and equity in their distribution, and make recommendations for changes that, if adopted, would increase citizens satisfaction with the distribution of public and private resources.

GROUP PROCESS

The committee, chaired by Dr. Paula Newsome, identified five areas where there were perceived inequities in the allocation of public and private resources. The five areas included housing, services, schools, buildings and facilities, and economic opportunities The committee was then divided into five sub-groups whose task was to address their assigned area of study in terms of where we are, where do we want to be, and how do we get there In the course of its work, the group came to the realization that the key issue was not the equal distribution of resources. Different sections of the community have differing needs Therefore, the key issue becomes the equitable, not equal, distribution of resources in light of the varying level of needs.

REPORT OF SUB-GROUPS

A. Schools

The Schools sub-group examined the issue of perceived inequities in the distribution of public school resources. To address this issue, the sub-group convened Charlotte-Mecklenburg School Administrators to serve on a panel. Panelists included Deputy Superintendent Calvin Wallace and Planning Director, Harold Deal.

The Schools sub-group reported to the full committee that school administrators have taken steps to address the perceived inequities, and the reality is that resources are being distributed equally However, there is a need to focus on the allocation of resources based on need The following is a summary of the sub-group's findings.

To address the perceived inequities, the Board of Education appointed a Westside Task Force in response to westside concerns. Parents, school personnel and central administrators served on the Task Force. After several months of study, the group made numerous recommendations. Major areas where perceived inequities existed were personnel, curriculum and course offerings.

The school system initiated efforts, which have been continued, to address the perceived inequities Some of these efforts include the following:

- Additional teaching positions are allocated on a regular basis.

- The quality of leadership and instruction is evaluated regularly. Inservice is provided for staff to address deficiencies and enhance services on an ongoing basis.

- Special programs such as "Write To Read", "Higher Order Thinking Skills", and numerous others have been implemented.

- New technological equipment such as network computer labs and laser disk players as well as reading materials and various other supplemental materials have been added to up-grade resources.

- Additional courses such as Latin and advanced placement are now offered.

- Special programs for the ninth grade are being piloted during 1990-91.

The quality and perception of westside schools continues to be a high priority for the School Board and administration. Ninth grade pilot programs are an example of the continuous response to westside concerns. Additional programs and resources are added and changes implemented as a result of on-going monitoring.

B <u>Housing</u>

The Housing sub-group presentation included a panel of local housing experts such as Peter Hubicki of the Charlotte Mecklenburg Housing Partnerships (CMHP), and Charles (Chuck) Uhlir of the City's Community Development Department.

The sub-group's findings, desires and strategies to address the westside issue included:

1. Findings

- Higher percent of deteriorated and dilapidated structures on the westside.
- Higher concentration of low income housing projects.
- 1980 census data shows "owner occupied" housing on par with rest of City.
- Except for a few areas, there is little new housing construction on the westside compared to other areas of Charlotte-Mecklenburg.

2. Desires

- Improve existing housing stock.
- Reinforce home ownership.
- Increase new construction of owner occupied homes.

3. Strategies

- Increase housing code enforcement activities (note: City began this in 1988).
- Develop Neighborhood Development Corporations along the lines of the Housing Partnership and Neighborhood Housing Services.
- Coordinate City services, (i.e. Police) to improve social aspects of the neighborhood.
- Continued support of City "scattered site" program.
- Seek ways to use infrastrucuture to lead growth on the westside similar to what was done in the University area.

In addition to the housing sub-group's recommendations, committee members suggested the need for the following:

(1) Need to create job opportunities.
(2) Need to provide westsiders access to opportunities.
(3) Need to improve "sense of place" on the westside.
(4) Need to promote infill housing in neighborhoods.
(5) Need to provide creative tax incentives for developers/builders.
(6) Need to take advantage of public/private housing resources in the local community, such as CMHP, Habitat, Rehabitat, and the City of Charlotte Community Development Program.

C. Buildings and Facilities

The Buildings and Facilities sub-group made a presentation of their findings concerning the condition and types of buildings and facilities on the westside. The group had three areas of focus: (1) business, (2) industrial and (3) residential.

The sub-group reported that the westside has a disproportionate amount of "unclean" business uses and environmentally unhealthy industrial sites which are close to residential areas. The westside also has a disproportionate amount of low income housing and substandard housing, as well as most NIMBY items, incinerators, landfills, transfer stations, and the satellite jail.

The sub-group also toured areas of the Westside and North Charlotte and reported that there was a higher percentage of abandoned and boarded up buildings, unsightly businesses like junk yards, and blighted retail centers than on other sides of town. The group attributed blighted retail centers to the growth of suburban strip malls and the movement of the residential base to the suburbs. The group also noticed that on the

westside that poor buffers exist between neighborhoods and other types of zoning uses (zoning incompatibility).

The Buildings and Facilities sub-group recommended the following:

1) Review zoning violations on the westside and bring violations to the attention of the appropriate governing body.

2) Review the report the City of Charlotte made to the Civic Index in reference to westside concerns to see if anything has been done to address any of these concerns.

3) Formulate a policy recommendation to address inequities and placement of NIMBY items, as the city is doing with the Housing Assistance Plan (HAP).

4) Evaluate the zoning within a particular area and report findings of incompatible uses.

5) Educate the public about imbalances. It is believed that many people are really unaware of the inequities that exist and the level of blight in some areas, and that by raising their level of consciousness that they will be more sensitive to the issues plaguing the westside.

6) Develop an incentive program which would attract businesses to locate in blighted areas on the westside.

7) Implement available public sanctions on westside businesses that contribute to the blight on the westside by not keeping up their store fronts and generally being "bad" neighbors.

8) Highlight the positive things happening on the westside, recognize *developers developing on the westside, etc.*

D <u>Economic Opportunities</u>

The Economic Opportunities sub-group's presentation included a panel of local economic development experts The panelists were Donald Johnson, President of the Beatties Ford Road Merchants Association and Vice President of Mechanics and Farmers Bank, *Laura McClettie, Executive Director of the West Charlotte Business Incubator* (WCBI), Chris Moise, Associate Director of the Ben Craig Small Business and Technology Development Center, and Dennis Rash, Vice President of NCNB National Bank.

The following are the findings of this group's efforts:

(1) Need immediate initiatives while working toward major impact investments.

(2) A strong housing base engenders economic opportunity.

(3) Minority and Small Business participation is important to economic vitality. Initiatives similar to Project Catalyst and Summit View should be encouraged.

(4) A broad-based neighborhood revitalization effort is needed as part of economic development.

(5) Definitive programs should be initiated to dispell negative perceptions and create a positive image for the Westside. Targets for these campaigns should be service, manufacture and retail employment providers.

(6) Investing in areas like the Westside is "good business".

Each program should include the following:

(1) The area needs a "champion".

(2) Determine population-market core, identify skills, and labor pool.

(3) Inventory all land and businesses.

(4) Assess the transportation network (bus, rail, road system, etc.).

(5) Develop programs which provide incentives for economic growth.

(6) Gain county commitment to the area.

(7) See that the Biddle Village Plan is implemented.

(8) JCSU should play a leadership role in whatever initiatives that take place on the Westside.

Any Westside strategy needs: 1) Education component, 2) Housing plan, and 3) a means of creating an environment where economic opportunities exist long term.

E. Services

The Services sub-group used two main approaches to address the distribution of services issues. First, the group used as a data base information from the County's 1989 Needs Assessment Survey and a survey conducted by Leadership Charlotte Class XII and Knight Publishing Company Research (KPC). Second, the sub-group developed their own survey which was administered to identified westside leaders.

As a result of the sub-group's survey of westside leaders, five westside inadequacies were identified. They included: 1) environmental protection, 2) neighborhood infrastructure, 3) substance abuse, 4) sanitation and 5) public safety.

The group's recommendation to address these five inadequacies are as follows:

1 Sanitation

The group recommended that if the program being piloted by the City in the Belmont neighborhood is successful, then it should be implemented in other key areas on the westside. The program in Belmont is a special 2-year pilot program to address illegal dumping in that area.

The group also recommended that extra services be given to those areas where sanitation problems are more prevalent.

The final recommendation the group offered was that a more complete system of record-keeping be developed within the city's department of Solid waste Services which would better identify and track complaints by area, type and frequency. NOTE: this is in the process of being done by the department.

2 Infrastructure

The group reported that it appeared that many of the infrastructure problems are due to people not knowing how to access services and lack of financial resources. The public needs to be educated about the various services and how to access them.

3. Environmental Protection

The group reported that a large percentage of zoning for industry is on the westside, therefore the westside is exposed to a higher percentage of environmentally related health hazards.

4 Public Safety

The group reported that public safety is improving on the westside and that more cross-cultural training is being done so that police officers have a better understanding and appreciation for the diverse cultures they interact with. However, historically people still have negative perceptions about police service and police/community relations.

5. Substance Abuse

The group reported that there is a greater need for treatment and prevention of substance abuse on the westside. Since the westside has several "pockets of poverty" and because many citizens cannot afford

private insurance or medical treatment, the problems of substance abuse are more prevalent.

The group recommended supporting projects such as the one being funded by the Robert Wood Johnson Foundation to address treatment and prevention needs in West Charlotte The project is being developed and administered by the Area Mental Health, Mental Retardation and Substance Abuse Authority.

FINDINGS

Throughout the process of sub-group presentations and discussions some evidence of perceptions of inequities were discovered. Since many of the inequities are perceived by a group of citizens in one geographic area, the basis of the perceptions need to be addressed and resolved. Again, the issue the committee felt was most crucial was the necessity to provide services and resources based on need.

The other issues the committee encountered were the recurrence of three common themes The themes encountered were:

(1) The need to educate citizens about the availability of certain services and resources and procedures for accessing them.
(2) The need to promote economic empowerment.
(3) The need to develop and maintain strong neighborhood organizations.

The following recommendations reflect the three common themes, as well as the outcomes the Equal Distribution of Resources Committee desires to achieve through the recommendations.

DESIRED OUTCOMES

(1) A community that is vital in all aspects in all areas; where the quality of life is not only maintained, but is improving for all of its residents.

(2) A mechanism that draws on the institutions and the current activities and past achievements of the underserved areas; a mechanism that relies on the talents, interests, and support of the residents of those areas.

(3) A mechanism that draws on the support, experience and expertise of committed persons who reside within and without the underserved areas.

RECOMMENDATIONS

Recommendation I. *Create a Target Business/Employment Development Effort*

A. Why?

To retain or expand business as well as recruit new business and thereby create increased employment.

B. Who?

City Economic Development and Community Development Departments, and Chamber of Commerce working together to identify a champion who could initiate efforts similar to the University City Development. The Charlotte Chamber should take the leadership role in this effort.

C. What?

Low interest loans for business development and/or other economic perks based upon models from other cities.

D When?

October 1, 1990 Chamber Task Force accept charge. The effort should be fully operational by January 1992

E. How?

Gain support from governmental bodies and community
Identify responsible agency.
Study other pilot programs

F Where?

West Boulevard and Remount Road, Five-Points and Statesville Road areas

Recommendation II. Create a Community Service Office

A. Why?

To provide a mechanism to give persons in our community improved access to public and private services and knowledge of said services. To enhance the capacity of neighborhood organizations in the underserved areas and provide them with access to leadership training and other skills-building tools.

B Who?

1. Neighborhood Grants Program
2 Mecklenburg Ministeries
3. United Way
4 Churches
5. Community Centers

C What?

1 Provide training in community organizing
2 Provide Mentoring Program
3 Provide information and referral to address the needs of the community.

D When?

Identify and recruit the sponsoring agency by November 1990

E How?

1 Sponsoring agency adopts the idea
2. Develop budget
3 Secure funding
4. Hire director
5. Locate site

F Where?

The following sites are recommended:

1 Statesville Avenue Area
2 Beatties Ford Road/5-Points Area
3 West Boulevard

The Equal Distribution of Resources Committee is aware that both of these recommendations will take considerable time and effort to initiate However, there are some things which can be done in the short-term to address some of the concerns raised during the committee's discussions The committee recommends that an Information Services Fair be held in targeted areas of the city.

Recommendation III Information Services Fair

A. Why?

One of the origins of the perceived dissatisfaction in the allocation of resources is the lack of understanding of services and ways to access them. The Information Services Fair would be a way of bringing information about the various city and county services, and the people who provide them, to the people who use them.

B Who?

United Way

The Information Services Fair would involve most departments and would fall under the direction of both the City and County Public Service and Information Departments.

C. What?

The Information Services Fair would have representatives from the various service departments within local government on site to provide information on the type of service they provide, procedures for accessing the service and address various other citizen concerns.

D When?

At a time when most of the citizens could attend, either evening or on a Saturday morning. The Fairs, if successful, could be held as often as quarterly, beginning in the Winter of 1990.

E. How?

- o Gain support from governmental bodies
- o Identify target areas
- o Seek assistance in planning Information Fair from target areas
- o Identify services where concerns or dissatisfaction exist within an area and make sure those services are represented at the Information Fair.
- o Publicity efforts would be required to ensure attendance by 200-500 citizens.

F. Where?

In any large public facility such as a church, school, neighborhood center in the vicinity of the following areas

West Boulevard and Remount Road area
Five Points area
Statesville Road area

CONCLUSIONS

This community has always been a leader in facing its challenges Through the initiation of this task force, it accepted the challenges to examine more fully some of the problems faced by Charlotte-Mecklenburg's citizens. The committee's original charge from the Civic Index Stakeholders Group was to determine if there is fairness and equity in the distribution of public and private resources and services throughout the community At the beginning stages of the investigation, the committee determined that this task was too large to be handled by this committee in the time period allocated. *Consequently, the committee focused its investigation on the westside of Charlotte-Mecklenburg*

The challenge is not complete. The committee desires for the original charge to be fulfilled Consequently, it recommends that successor Equal Distribution of Resources committees be appointed at later dates by the Civic Index Stakeholders Each successor committee would investigate a geographical area of the Charlotte-Mecklenburg community to determine if there is fairness and equity in the distribution of public and private resources and services Such successor committees could use the procedures and work of *this committee as a model in its task*

During this committee's deliberation, it appeared that following the westside, the northeast section of Charlotte may perceive that public and private resources and services are not equitably distributed to it Consequently, this committee recommends that the northeast section of Charlotte-Mecklenburg be the next geographical area studied by a successor Equal Distribution of Resources Committee

The recommendations made in this report only serve as a step in the work that must be done *The challenge will be to implement the recommendations made in this* report and to insure that all of Charlotte-Mecklenburg enjoys and partakes of the fruits of this thriving community

LOCAL GOVERNMENT

LOCAL GOVERNMENT

CITY COUNCIL WORKSHOP

OCTOBER 1, 1990

Introduction

At the February retreat, Council identified the role and structure of our local government to be an issue upon which to focus The following expectation was developed at that time

> "We would like a Charlotte striving to have a local government with clear and understandable roles, which has the trust of the citizens, operates with a coordinated local policy direction, and has clear goals and stated implementation strategies "

A copy of the issue identification page from the retreat booklet is attached, which shows the problems, opportunities and possible action steps identified at that time

The local government issue will be developed using the same questions used to develop previous issues

1 What does City Council want to accomplish?

2 What is the City's role in accomplishing these goals?

3 Who are the key actors?

4 What are the constraints on City actions?

5 How may these constraints be addressed?

In addition, the following background material is included

1 Civic Index Report

ISSUE: LOCAL GOVERNMENT

Summary

People expect more of local government and are holding it more accountable. But the nature of leadership is changing, and the role of city government itself needs to be clarified in relation to other institutions and governing bodies.

Problems

- leadership needs to look at bigger picture, the longer view
- difficult to reconcile Council responsibilities with community expectations in sorting through big/little agenda issues
- less public tolerance for mistakes (the stakes are higher)
- diverse population makes it more difficult to achieve consensus
- growing population makes it more difficult to focus on broad community concerns rather than specific neighborhood issues
- nature of leadership is changing to single-issue, direct-impact
- public may be searching for simple answers to complex problems

Opportunities

- public expectations creating more and better accountability
- promotes need for improved leadership that balances community/neighborhood/individual needs
- promotes need to "think larger" for coordinated policy direction
- scale of problems leads to "regional thinking" to address them
- less federal grants promotes need/opportunity for more public/private partnerships
- pressure for innovative approaches to problem-solving

Expectation

We would like a Charlotte striving to have a local government with clear and understandable roles, which has the trust of the citizens, operates with a coordinated local policy direction, and has clear goals and stated implementation strategies.

Possible Action Steps

1. Work toward regional policy direction for regional issues, and regional funding for regional facilities. Specifically, work toward regional solutions for concerns in land use, transportation, waste management, and criminal justice.

2. Work toward more effective ways to explain Council decisions to the public, and to receive feedback in many forms.

3. Look at ways to improve Council's handling of agenda items and delegating responsibilities to staff.

4. Review the structure of government; specifically, move forward to a decision on consolidation of services.

o WHAT DOES CITY COUNCIL WANT TO ACCOMPLISH?

1 How can accountability to the public be increased?

2 How can the City provide leadership to balance community-wide issues, neighborhood issues and individual needs?

3 Can communication to/from the citizens be enhanced?

4 Should alternatives for the handling of Council issues and agenda items be considered?

5 Is it appropriate to delegate more responsibilities/decisions to staff?

6 Which roles need clarification among companion governmental units and how may they be clarified?

7 Is the correct political structure in place relative to length of terms, partisan elections and the combination of at large and district representation?

8

9

10

o WHAT IS THE CITY'S ROLE IN ACCOMPLISHING THESE GOALS?

1 Should the City spearhead building a regional coalition on issues such as growth, transportation and solid waste management? (Note regionalism relative to the Growth Issue was discussed at the July workshop and will be incorporated in the Policy Statements developed before your November retreat)

2 How should leadership be structured to balance progress achieved on issues ranging from state or regional issues to neighborhood, individual, or special interests?

3 Can better use be made of public/private partnerships?

4 Is the City satisfied with the channels of communication it has with citizens, or is it appropriate to consider new methods of public information and customer service?

5

6

7

8

9

- WHO ARE THE OTHER KEY ACTORS?

  1. Citizens?
  2. Neighborhood groups?
  3. Special Interest groups?
  4. Regional municipalities and counties?
  5. Mecklenburg County?
  6. The State of North Carolina?
  7. The local media?
  8. City staff?
  9.

- WHAT ARE THE CONSTRAINTS ON CITY ACTIONS?

The problems, opportunities and possible action steps identified at the February retreat for the Local Government Issue focus on four areas accountability/information, Council process/agenda, role clarification and government structure Possible constraints are grouped in that way These "constraints" may also be perceived as strengths in some cases

1 Accountability/Public Information

- Complexity of issues/solutions make decisions difficult for the public to understand
- The role of the media
- Cost and logistical problems with reaching the public with complex information
-
-

2 Council Process/Agenda Handling

- Time constraints
- Policies outlining decisions allowed at the administrative level and those requiring Council consideration
- Meeting schedule (too long/too short, too frequent/too infrequent)
-
-

3 Role Clarification

- Public confusion over which governing body does what Council, County Commission, School Board, Housing Authority, Coliseum Authority, State Government, Federal Government
- Competition for resources
- Leadership
-
-

4 Governmental Structure

- o Partisanship
- o 2-year terms
- o non-staggered election
- o at-large/district representation
- o City/County consolidation or lack of consolidation
- o Part-time Council
- o
- o
- o

- HOW MAY THESE CONSTRAINTS BE ADDRESSED?

  1. Accountability/Public Information

     - Media briefings on complex agenda items
     - Direct mailings/updates to citizens
     - Regular district meetings
     -
     -

  2. Council Process/Agenda

     - Address ways to speed up or lighten Council's workload
       - Committee structure
       - Delegation to staff
       - Council meeting format changes
       -
       -
     -
     -

  3. Role Clarification

     - Take leadership role in regionalism
     - Define role ambiguity and share problem with other elected/appointed bodies
     - Publication on local roles and responsibilities
     -
     -
     -

4 Governmental Structure

- Discussion of alternatives to Council's current structure/ system
- Continue working toward resolution of political consolidation issue
- Incorporate Local Government issue concerns into action plans for other issues education, growth, crime and drugs and public resources
-
-

CIVIC INDEX ELECTIVE PROCESS COMMITTEE

I *Introduction*

The development of the Elective Process Committee resulted from issues identified and a recommendation made by the Civic Index Stakeholders' Committee.

The recommendation from the Civic Index is as follows:

> INCREASE CITIZEN INTEREST, PARTICIPATION, UNDERSTANDING AND OWNERSHIP OF THE COMMUNITY'S ELECTIVE PROCESS FOR LOCAL AND LEGISLATIVE OFFICES.

The procedure for meeting this obligation was defined in the final report of the Civic Index and is as follows:

> Form a broadly-based citizens committee to conduct an in-depth study of the local elective process. Study possible changes in the length of terms for members of the County Commission, City Council and Board of Education; a possible limit to the number of terms served; the comparative arguments for partisan vs. non-partisan elections to local office; changes in the timing of local elections; and other matters pertaining to local elective offices.

According to the final report, this broadly-based citizens committee was to "make recommendations to responsible elected bodies for changes that would rekindle citizen interest, understanding and participation as well as instilling in the public a greater sense of ownership in the election process."

This broadly-based citizens committee was chosen by the Civic Index Stakeholders. The membership of the committee is as follows:

Bill Coley, chair
Ernest Alford
Linda Ashendorf
Kirk S. Ashton
Ken Baker
Thomas E. Baldwin
Fran Barnhart
Daniel Berry
J. Robert Bryant, Jr.
Sandy Carnegie
Joe Champion
Jim Cook
Bill Cowden
Doris Cromartie
Carol Donaldson
Carla DuPuy
Kenneth D. Forrester, Jr.
James F. Foxx
Susan Hancock
Don Harrow
Kimm Jolly
Sylvia Jordan
Randy Kincaid
Elliott Lynch
Joe Martin
Daryl McCall
Joe L. Miller
Cyndee Patterson
Steve Porter
Kevin Patterson
Bea Quirk
Samuel Reid
Sam Smith
John Stroup, Jr.
Ken Szymanski
Ella Talley

Bill Coley was selected as chair of this committee and Ted Arrington, Bill Culp and Bill McCoy were chosen to serve as a resource committee for the citizens' group.

The first meeting of the group was held on February 5, 1990, and successive meetings were held approximately at three-week intervals through July, 1990. At the first meeting, the committee decided that its decision rule would be by consensus and that it would spend most of its time in an open discussion of a variety of issues that were identified by the resource committee and the committee of the whole. Data and information that would serve as the basis for the discussions would be provided by the resource committee, the committee of the whole, and community resource persons invited to participate in the discussion of the issues.

These processes were adhered to during the ensuing discussions. All decisions were made by consensus and that consensus was checked at least once during another meeting in order to insure that any committee members who might object had ample opportunity to do so.

This format led to a series of recommendations on the following topics: the short ballot, the timing of elections, campaign reporting, partisan vs. non-partisan elections, consolidation, election law, and the role of the media. Among the recommendations are calls for action from local governing officials and the state legislature as well as some suggested responses that could be made by local institutions, state institutions, and the media that might assist in meeting the committee's charges.

The recommendations of the Civic Index Elective Process Committee are found in the next section of this report.

II Recommendations

A. SUBJECT: *The Short Ballot*

RATIONALE: We believe that one important reason for the lack of public participation in the political process is that voters are asked to go to the polls too often, and the ballot is too long and complicated. This is not a product of local election procedures for the most part, but a remnant of state policies designed for a rural, 19th Century North Carolina which is gone forever.

RECOMMENDATION: We recommend the following changes in General Statutes and the State Constitution:

1. Elimination of the run-off primary.

2. Reduce the number of judicial positions on the ballot by electing Superior Court Judges in their districts.

3. Investigate judicial selection systems that would remove at least District Court and Superior Court Judges from the ballot entirely, but retain public control with voter retention or recall provisions.

4. Study the council of state to determine which, if any, of the positions should be elected and remove the others from the ballot.

5. Seek provisions of local option to make Register of Deeds a county civil service appointment and Clerk of Superior Court an appointment of Superior Court.

B. SUBJECT: The timing of elections

RATIONALE. We believe the current process of electing some local officials in even numbered and some in odd numbered years is confusing to the voters, introduces state and national issues and trends into local government and lessens the effectiveness of citizen participation.

RECOMMENDATION: We request that the local governing authorities consider holding all local elections at the same time. They should take the necessary steps through local ordinances or through requesting state legislative action to have elections for Charlotte City Council, Mecklenburg County Board of Commissioners, Charlotte-Mecklenburg Board of Education and Town Councils in odd numbered years. Time these elections as follows:

1. Have the first primary the second Tuesday in September.

2. Have the runoff primary, if one is needed, the first Tuesday in October.

3. Have the general election on the first Tuesday after the first Monday in November. This would include a simple plurality system for the School Board on this date.

C. SUBJECT: Campaign Reporting

RATIONALE We believe that the campaign reporting process should disclose financial information in a clear and precise manner Full public disclosure will require some changes in state law.

RECOMMENDATION. We recommend the following changes in the General Statutes

1. Require name and address for all contributors giving an amount of $50 or above.

2. Centralize filing of campaign reports for members of the General Assembly. Currently most legislators file reports in Raleigh, with the remainder scattered in Election Offices in 16 counties in single member districts. Require that a duplicate of each report be filed in the Election Office of legislators home county.

3. Require that contributors of $250 or more identify their occupation or place of employment and that this information be noted on campaign reports.

D. SUBJECT Partisan vs. Non-Partisan Elections

RATIONALE· Partisan elections have been proven in this locality to facilitate the recruitment of strong candidates for public office, provide useful cues for voters, give a basis for building coalitions for previously unknown candidates, reduce the role of money and special interest groups, and provide contacts between local officials and national and state leaders.

RECOMMENDATION. We endorse the current system of partisan elections for City Council and County Commission.

E. SUBJECT: Consolidation

RATIONALE The question of consolidation of the city and county governments is outside the jurisdiction of this panel. We have, however, reached a consensus that consolidation will not harm citizen participation in local government in Charlotte and Mecklenburg County and it could enhance it

RECOMMENDATIONS We have also reached consensus on some aspects of the structure of a possible consolidation government which we believe would facilitate citizen involvement:

- Elections should be partisan. Partisan elections have been proven in this locality to facilitate the recruitment of strong candidates for public office, provide useful cues for voters, give a basis for building coalitions for previously unknown candidates, reduce the role of money and special interest groups, and provide contacts between local officials and national and state leaders.

- Elections should be held during odd numbered years. The primary should be held on the second Tuesday in September, the run off (so long as this is required under North Carolina law) on the first Tuesday in October, and the elections on the First Tuesday after the First Monday in November This schedule will facilitate the focus on local issues by the electorate and the candidates, and reduces the congestion of the ballot during Presidential and off-year elections.

- Officials in the consolidated government should serve for two-year terms, with no staggering of terms. We believe that short terms keep officials close to the voters, and the normal retirements in this locality have provided adequately for turnover of elected officials with sufficient continuity from one year to the next. In an expanded commission/council steady turnover would be even more likely.

- A presiding officer of the consolidated commission/council should be elected directly by the voters separately from the other members of the body. The powers to be granted this presiding officer are an important consideration, but outside our charge. It is clear that voters are motivated to participate by the sharpening of issues that occurs in a one-on-one race for the top official of the government.

- The consolidated commission/council should contain a mix of district and at-large members. The size of the commission/council should be larger than the present County Commission (7), but no larger than the combination of the present City Council and County Commission (19). The commission must be small enough to act efficiently, but large enough to accommodate districts for unique areas such as northern Mecklenburg while still providing some at-large members for balance. Simple justice and the provisions of the Voting Rights Act dictate that the number of majority African-American districts as a percentage of the total membership of the commission/council must exceed 18%. This is the current proportion of African-American districts provided by the City Council, while the County Commission has only 14%. Neither body currently provides sufficient minority representation.

- The timing of elections for the School Board should be brought into line with the new consolidated government. We do not have a consensus on whether School Board elections should be partisan or nonpartisan. If School Board elections are partisan, then the timing scheme presented above is appropriate for the School Board. If School Board elections remain nonpartisan, then we suggest a single plurality election for this body to be held at the same time as the elections for the consolidated commission/council (i.e., November of odd numbered years). Educational issues are inherently woven into the fabric of local government, and will get more attention from voters when separated from high visibility state and national elections. Since the consolidation commission/council will determine the budget for the schools, there is no basis for separating elections of these bodies.

- The question of district elections for School Board is an important matter with implications for public participation whether or not the city and county are consolidated. While we did not reach consensus on districting the School Board, we did agree that the various arguments for and against districting for other local governing units also apply here. Also applicable is the consideration of the number of district and at-large seats discussed above with reference to a consolidated commission/council.

- We believe that the public is impeded from meaningful participation in the formation of educational policy by the overlapping, conflicting, and unclear lines of authority in both the North Carolina and local School systems. At the state level the division of authority between the elected Superintendent and appointed School Board is confusing to voters and prevents them from placing responsibility for education on the Governor, the General Assembly, the State Board of Education, or the separately elected Superintendent. We suggest elsewhere a partial solution to this in our recommendations for shortening the ballot. At the local level the division of authority between the County Commissioners, who authorize the budget, and the Board of Education, which determines educational policy, is equally confusing to voters and is compounded by unclear roles of the elected Board as opposed to the appointed Superintendent. While we were not able to reach consensus on solutions to the local problems, we were able to agree that the current system is unsatisfactory because it makes it impossible for voters to determine who should receive praise for the things that go well and who to blame for inadequacies.

NUMBER OF BLACK DISTRICTS THAT COULD BE DRAWN AND PROPORTION
OF AT-LARGE MEMBERS THAT COULD BE ADDED
WITHOUT IMPERMISSIBLE DILUTION OF THE BLACK VOTE

NUMBER OF DISTRICTS DRAWN IN COUNTY	BLACK DISTRICTS (65% + BLACK POP)		MAXIMUM AT-LARGE THAT COULD BE ADDED	SIZE OF BODY AT MAX AT-LARGE	% BLACK AT MAXIMUM AT-LARGE
	NUMBER	PERCENT			
3	1	33%	2	5	20%
4	1	25%	1	5	20%
5	1	20%	0	5	20%
6	2	33%	5	11	18%
7	2	28%	4	11	18%
8	2	25%	3	11	18%
9	3	33%	7	16	18%
10	3	30%	6	16	18%
11	3	27%	5	16	18%
12	4	33%	10	22	18%
13	4	31%	9	22	18%
14	4	28%	8	22	18%
15	5	33%	12	27	18%
16	5	31%	11	27	18%
17	5	29%	10	27	18%
18	6	33%	15	33	18%
19	6	32%	14	33	18%
20	6	30%	13	33	18%

Table Drafted 21 June 1990

F. SUBJECT: Election Law

RATIONALE. Public participation can be enhanced by making registration and the physical act of voting easier and more pleasant.

RECOMMENDATIONS: We have reached consensus on two minor, but useful, changes which would make registration and voting easier.

- We recommend that legislation be introduced to provide for a mail system of voter registration. Virtually all studies of the election process show that the inconvenience of registration is the major hurdle preventing many people from voting. Where registration is easy, voter turnout is increased. As long as the deadline for registration remains as in current law, there is no reason why registration by mail should encourage fraud or be administratively difficult.

- We recommend that the Charlotte/Mecklenburg Board of Education provide for teacher's workdays for all regularly scheduled general elections and primaries in their regular academic calendar for each year. Congestion and confusion in both parking areas and voting rooms is engendered by the presence of students and vehicles. This adds to the time necessary to vote and to the difficulty, especially for working people with limited time and for handicapped citizens. Teacher's workdays are often scheduled in the week preceding or following elections. Minor calendar changes by the Board of Education can be made which will accomplish this goal. The Board of Education has provided for teacher's workdays for Presidential elections for many years, so the principle is firmly established.

G SUBJECT: Role of the Media

RATIONALE: We believe that the diversity and size of the audience that both print and electronic media enable them to play an important role in informing and educating the public about the electoral process. By providing more indepth, creative and frequent election coverage, the media could be one of the educational tools by which voter apathy is reduced, knowledge of election process is enhanced and voter turnout increased.

RECOMMENDATION: We suggest that the media consider the following ways to enhance their role in providing election coverage:

1. Review their philosophy on informing and educating the public about the electoral process.

2. Pursue cooperative programming efforts between public and commercial media.

3. Increase coverage on candidate's performance in office.

4. Consider a government and election coverage updates in formats similar to Final Edition (WTVI), Healthbeat (WSOC) and Business Journal (WBTV), which are regular programs shown at consistent times.

5. Provide coverage on the process of voting and the elective process.

6. Improve coverage of the political parties to include precinct meetings, county conventions, and the decisions made at such meetings.

III. Conclusions

The recommendations in this report are directed to the local governing agencies (City Council, County Commission, School Board, and town officials), the local delegation to the General Assembly, the consolidation charter commission, and the media.

The Elective Process Committee seeks an appropriate forum to present these recommendations to those parties responsible for the policy changes advocated in this report.