AGENDA

Meeting Type:	S
Date:	02-21-1992
SUBJECT	CITY COUNCIL RETREAT

City of Charlotte, City Clerk's Office

AGENDA

CITY COUNCIL RETREAT
FEBRUARY 21-22, 1992
CHARLOTTE-MECKLENBURG GOVERNMENT CENTER

Friday, February 21

1 00	TEAM BUILDING
	(This session will be in Room 270 All other sessions and events will be in Room 267 unless otherwise noted)
2 45	Break
3 00	CRIME AND DRUGS*
4 45	Process Review
5 00	Social Hour and Dinner (Omni Hotel, Graves Room, 3rd floor)

Saturday, February 22

8 00	COFFEE
8 15	Process Review
8 30	RESOURCES
10 30	Break
10 45	REGIONALISM
12 00	Lunch
1 00	CITY WITHIN A CITY
3 00	Break
3 15	POLITICAL CONSOLIDATION
4 30	Process Wind Up

**Staff will join the Mayor, Council and Manager at this point.*

Brenda F

CHARLOTTE

Memo

Tom Flynn
Assistant to the City Manager

2-14

RECEIVED
FEB 14 1992
OFFICE OF CITY CLERK

TO: Council Retreat Staff.

Attached is a revised agenda for the Council retreat. Please call me at 4630 if you have any questions.

Thanks

Tom

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CITY COUNCIL RETREAT
SMALL GROUP ASSIGNMENTS
CRIME AND DRUGS
(FRIDAY)

	Lobbying	Coordination	Brainstorming New Ideas
3:00-3:30	1.Campbell 2.Clodfelter 3.Hammond 4.Majeed	1.Mangum 2.Martin 3.McCrory 4.Patterson	1.Reid 2.Scarborough 3.Vinroot 4.Wheeler

	Lobbying	Coordination	Brainstorming New Ideas
3:30-4:00	1.Reid 2.Scarborough 3.McCrory 4.Patterson	1.Campbell 2.Clodfelter 3.Vinroot 4.Wheeler	1.Mangum 2.Martin 3.Hammond 4.Majeed

	Lobbying	Coordination	Brainstorming New Ideas
4:00-4:30	1.Mangum 2.Martin 3.Vinroot 4.Wheeler	1.Reid 2.Scarborough 3.Hammond 4.Majeed	1.Campbell 2.Clodfelter 3.McCrory 4.Patterson

CITY COUNCIL RETREAT
SMALLGROUP ASSIGNMENTS
CITY WITHIN A CITY
(SATURDAY)

	Council Priority + Untargeted Neighborhoods	Building Neighborhood Partners	Selecting Future Neighborhoods
1:00-1:30	1.Martin 2.McCrory 3.Patterson 4.Reid	1.Scarborough 2.Vinroot 3.Wheeler 4.Campbell	1.Clodfelter 2.Majeed 3.Hammond 4.Mangum

	Council Priority + Untargeted Neighborhoods	Building Neighborhood Partners	Selecting Future Neighborhoods
1:30-2:00	1.Mangum 2.Hammond 3.Wheeler 4.Campbell	1.Martin 2.McCrory 3.Majeed 4.Clodfelter	1.Scarborough 2.Vinroot 3.Patterson 4.Reid

	Council Priority + Untargeted Neighborhoods	Building Neighborhood Partners	Selecting Future Neighborhoods
2:00-2:30	1.Scarborough 2.Vinroot 3.Majeed 4.Clodfelter	1.Mangum 2.Hammond 3.Patterson 4.Reid	1.Martin 2.McCrory 3.Wheeler 4.Campbell

REQUESTED BRIEFING PAPER

EXISTING CRIME AND DRUG FIGHTING ACTIVITIES IN THE COMMUNITY

The following are brief descriptions of existing programs in the community the target aim of which is relating to fighting crime, drugs and violence in the community.

MECKLENBURG COUNTY CRIMINAL JUSTICE COMMISSION

The Mecklenburg County Board of Commissioners established an advisory commission to be known as the "Mecklenburg County Criminal Justice Commission". The Criminal Justice Commission was established to study all aspects of the criminal justice and crime prevention systems within State, County, municipal and private agencies within Mecklenburg County. This purpose is to include the study of the health and human services and educational systems, as they relate to criminal justice and crime prevention. This Commission has the authority to make recommendations to the Board of County Commissioners, the City Council and to any other appropriate agencies/officials on policies and programs designed to accomplish the following objectives:

- To provide overall coordination to law enforcement and crime prevention efforts in Mecklenburg County.
- To provide an efficient, cost-effective and timely criminal justice system in Mecklenburg County.
- To effect the reduction of crime in Mecklenburg County.

The Criminal Justice Commission was given authority and powers as follows:

- To review research and evaluation of existing systems and programs within the scope of the Criminal Justice Commission.
- To establish task forces or subcommittees to study key aspects of programs and systems in criminal justice.
- To review the work of the Planning Committee and other reports on the criminal justice system including the American University studies and follow-up reports.
- To review and comment on operating and capital budget requests and make recommendations to appropriate parties.
- To make recommendations on modifying, creating, or abolishing public or private systems and programs within the scope of the Criminal Justice Commission.
- To make recommendations on modifying, creating, or abolishing legislation, ordinances, or regional or County-wide comprehensive plans dealing with criminal justice systems and programs.

CHARLOTTE-MECKLENBURG DRUG AND ALCOHOL COMMISSION

The Charlotte-Mecklenburg Drug and Alcohol Commission was established in August, 1989 and is charged with the task of developing and implementing a community awareness program on the problem of substance abuse, making recommendations for a comprehensive action plan and overseeing the planned implementation. The Commission was established by the following:

The United Way of Central Carolinas, the Mecklenburg County Board of Commissioners, Charlotte City Council, the Alcohol Beverage Control Board, the Charlotte-Mecklenburg Board of Education, the Charlotte Chamber of Commerce, the Junior League of Charlotte. The Commission has made 10 recommendations as follows:

- Recommended a media campaign on community awareness of substance abuse.
- Recommended promotion of a 24-hour drug and alcohol abuse hot-line.
- Recommended the design of a program for working with youth in the public schools.
- Development of a work place substance abuse awareness program working with the Charlotte Chamber of Commerce (a business assistance program).
- Recommended organizing an educational seminar for clergy and workers with religious communities.
- Recommended a position in the public school system to study the overall problem of substance abuse.
- Recommended the creation of 1200 new jail beds in Mecklenburg County.
- Recommended a program on "Do Drugs, Do Time" fashioned after the Phoenix, Arizona program.
- Recommended hiring a consultant to study 24-hour care for adolescent substance abusers.
- Recommended that the Drug and Alcohol Commission be an ongoing body in Mecklenburg County.

PROJECT FIGHTING BACK

Project Fighting Back is a community based substance abuse program under the auspices of Mecklenburg County. The program's objective is to reduce the demand for illegal drugs and alcohol. the program's focus is generally the Westside of Charlotte (the County Commission District #2).

Residents of West Charlotte joined with County government, churches, business and civic leaders, and others to combat growing substance abuse problems in the target community. The project's aim is to develop a comprehensive program including prevention, education, early intervention, treatment, and after-care services for drug abuse, drug abusers and potential drug abusers in the targeted community.

DRUG INTERDICTION PROGRAM THE CHARLOTTE POLICE DEPARTMENT

The Charlotte Police Department has two drug interdiction efforts. They are as follows:

Street Drug Interdiction Program

This program targets streets and neighborhoods where there are open drug sales. The tactics include:

- Uniformed patrol
- Reverse sting operations
- Undercover surveillance

Airport Drug Interdiction

This interdiction program targets certain flights that tend to be from cities where there is drug activity or from which drugs are suspected to come. The program also works on targeting individuals who fit the FBI/DEA defender profiles. This program also targets bus and train stations for potential drug traffickers.

STOP THE KILLING PROGRAM

The "Stop the Killing Program" is a program conceived of and organized by Reverend James Barnette. The program's aim is to increase citizen awareness of the problems associated with crime and drugs in Charlotte-Mecklenburg and to form a broad based citizen coalition, and define community solutions to the problem. The program is funded through contributions and the sale of such items as t-shirts, hats, and bumper stickers. The program receives various kinds of support from the Charlotte Police Department and other agencies.

THE NEIGHBORHOOD WATCH PROGRAM

Neighborhood Watch is a program for individual neighborhoods working with the Charlotte Police Department to enhance the security of local neighborhoods. The criteria for Neighborhood Watch is as follows:

- Fifty percent of the households in the defined neighborhood must agree to participate.

- Fifty percent of the participants must engrave their valuables with their North Carolina driver's license number.

- The Neighborhood Watch organization must hold at least two meetings per year. The meetings will be attended by representatives from the crime prevention section of the Police Department and on occasion, an officer from the appropriate patrol district and other City officials.

- The Chair person of the Neighborhood Watch Association must attend an annual meeting of the Chair persons of all programs.

There are currently 113 Neighborhood Watch Programs classified as active and number of others in various stages of organization.

VARIOUS CHARLOTTE POLICE DEPARTMENT/CRIME AND DRUG TASK FORCE ACTIVITIES

- Code Enforcement Team.

  This program involves several City departments including Code Enforcement, Police Department, Fire Department, and others as appropriate. The program targets residential and commercial or business buildings in neighborhoods that are known or suspected to be involved in drug trafficking.

- Community Based Policing in Targeted Neighborhoods.

  This program involves community policing efforts in Belmont, Dalton Village, Seversville, Grier Heights and teams of police officers both uniformed and non-uniformed, working long term in the community on community needs identifying with residents and involving the residents in taking back their community.

- Community Based Policing in Charlie 1.

  This is the Police Department's test model for community based policing which will involve all of Charlie 1 patrol district.

OTHER ANTI-DRUG PROGRAMS IN THE COMMUNITY

DARE

DARE is a program involving police officers in both City and County Police Departments working with elementary age or junior high age students on drug education.

"I'm Special"-- a Junior League Program

This program sponsored by the Junior League works with elementary school children helping to build strong self-concepts and anti-drug attitudes.

Drug Education Center

The County's Drug Education Center has a number of programs including a work place program which emphasizes drug education and drug screening in the work place.

EAP (Employee Assistance Programs)

A number of employers in Charlotte-Mecklenburg have employee assistance programs that emphasize counseling and treatment for employees who are identified as having drug or alcohol problems.

Save the Seed

Save the Seed organized by Ron Leeper is a program involving mentors working with young men on the Westside. The program involved volunteers from various churches and other organizations.

Success by Six

Success by Six is a United Way program involving participation from the YMCA, United Way, the City's Neighborhood Centers Department, Mecklenburg County, and Foundation for the Carolinas.

YMCA Community Development Program

This is a new program being organized by the YMCA emphasizing involvement with families and individuals in "high risk" areas. The program will target a number of individual needs and will include an anti-drug component.

YES

The YES program is sponsored by the Y's in Charlotte.

COUNCIL BRIEFING PAPER

CITY WITHIN A CITY: BELMONT

HISTORY: The Belmont Task Force was established by the City Manager in March 1987 to investigate the myriad problems facing residents of Belmont. In October 1988 the Task Force presented a lengthy report to City Council containing dozens of recommendations. Belmont neighborhood representatives were asked to prioritize which traditional City services were most likely to address problems identified in the report. In order of priority they were (1) crime prevention; (2) neighborhood cleanliness; (3) employment and training; (4) housing conditions; and (5) recreation.

The Belmont Implementation Plan, approved by Council in October of 1989, reflects these priorities. The City hired five additional field staff persons for Belmont in early 1990: two Police Officers; one Community Improvement Inspector; one Employment and Training Counselor and one Housing Inspector. Since that time, this group of City employees has been meeting monthly in Belmont along with representatives from County agencies, nonprofits, churches, residents' groups and others.

SUCCESSES: While the problems facing Belmont require a long-term approach for lasting success, much progress has already been made.

- Crime: Several drug operations were driven out of the neighborhood. In most categories, however, both reported crime and arrests were up in 1991. Paradoxically, this is probably more evidence of success than failure. More arrests should follow increased police presence in the neighborhood, and more crime reported can signal greater confidence in the reporting system. By now, most residents know Officer Leon Threatt by name and feel safer knowing that they can call upon him as a resource.

- Neighborhood Cleanliness: From February 1990 to November 1991, 62 neighborhood clean-ups were held removing 337 tons of waste and attracting 389 volunteers. Both residents and staff report that the neighborhood looks cleaner than it did five years ago as a result of the Solid Waste Department's efforts.

- Job Training: During 1990 and 1991, a total of 45 residents were placed in classroom training and 46 were referred to on-the-job training. Of the latter, 2 were placed in jobs and another 27 clients found jobs/direct placement on their own.

- Housing: In 1990 and 1991, 337 houses were brought up to code, 28 dilapidated units were demolished and 16 low-interest rehab loans were made. Habitat for Humanity built 61 new houses for low-income families. These results exceed the annual targets for housing set forth in the 1988 Task Force Report.

- Child/Youth Services: St. Paul Baptist Church established a day care center in 1989 to accommodate 100 children. The City sponsored an after school program at the church for children ages 5-12. The Belmont Library reports that overall circulation has increased faster in Belmont than citywide. United Way recently implemented its Success by Six initiative in Belmont and surrounding neighborhoods.

- Infrastructure: Belmont received $65,000 for sidewalk repairs in 1991. Contracts for $1.4 million in storm drainage and minor street improvements, new sidewalk and curbing will be awarded in early 1992.

- Community-based Organizations: Implementing a key recommendation of the 1988 Task Force Report, the Belmont Community Development Corporation was incorporated in July 1990. Half of its Board is made up of residents. The Belmont Neighborhood Strategy Force, made up of neighborhood residents, meets regularly to address neighborhood concerns.

- Changing the Way We Do Business: Coordination among City field staff working in Belmont has become routine, and team members' work is more effective as a result. The County and other agencies with resources and vital roles to play have gradually been brought along, making the Belmont Plan a model for coordinated action in other communities.

ISSUES: Despite these accomplishments, a number of issues can be highlighted for further attention.

- Crime: While Officer Threatt and Officer Brown's efforts to build relationships with neighborhood residents are part of a long-term, preventive approach to crime and drugs, they cannot be in all places at all times. Problems they identify include prison overcrowding, which returns offenders to the community, and the lack of adequate substance abuse treatment services.

- Resident Involvement: Lack of information, high occupancy turnover, and general economic distress are among the reasons most often cited for what some perceive to be limited success in the area of citizen participation. A few highly committed individuals have worked tirelessly on behalf of the neighborhood, but their time and energies are stretched. Some see a need to promote leadership development and community organizing training for neighborhood organizations and to strengthen the City's outreach and communication efforts.

- Commercial Development: Unfortunately, little progress has been made in the area of commercial revitalization since the Task Force Report. The recession, market dynamics and perceptions of risk on the part of private investors have all played a part. Meanwhile, the Belmont CDC, a potential vehicle for such efforts, got off to a slow start for a variety of reasons. The CDC is now exploring the feasibility of developing new businesses aimed at neighborhood needs.

- Recreational Space: The Task Force Report identified a lack of accessible recreation space for neighborhood youth. To date this remains a significant problem. Parks and Recreation is exploring the possibility of utilizing Hawthorne School in off-hours for recreational activities.

- Supporting the Neighborhood Team: Some team members report that they Occasionally experience burnout, partly because their work is inherently difficult, and partly because understanding of their efforts is not always present in higher ups. Others who have been recognized for their efforts have been promoted out of the neighborhood. Ways need to be found to reward team members professionally while keeping them in the neighborhood, where their reservoir of skills and information is much needed.

COSTS: Program Budget (for capital expenditures, see infrastructure above).

Item	FY90 (6 mos.)	FY91 Budget	FY92 Budget	FY93 Projected
Personnel/Misc.	$85,620	$154,005	$176,205	$183,080
St. Paul Program	$15,368	$ 45,349	$ 43,674	$ 44,500
Total Cost:	$100,988	$199,354	$219,879	$227,680

NOTE: In FY90 and FY91, the total cost of the Belmont implementation Plan was funded by the Community Development Block Grant Program. Due to HUD audit findings against the City, costs for everything but the St. Paul Program were shifted from CDBG to the General Fund.

GENESIS PARK PROJECT

WHERE: Genesis Park, an area comprising of Kenny, Gibbs, Wayt and Double Oaks Streets - known previously as a center for Charlotte's drug trade.

WHO: Charlotte Genesis, Inc., Community Outreach Mission Church, the Charlotte-Mecklenburg Housing Partnership (CMHP), Habitat for Humanity, Family Housing Services, various City departments.

WHAT: An effort to transform the neighborhood into a safe and attractive place where families will want -and be able- to buy homes.

HOW: • Acquisition and rehab of rental properties for resale to low-income families • Construction of new in-fill housing on vacant lots • Use of volunteers to provide "sweat equity" • Credit counseling ° Family support services to new homebuyers.

CITY ROLE: • Enhanced security and, starting July 1, community policing ° A $250,000 loan from the Innovative Housing Fund • Infrastructure improvements • Stepped-up housing and litter code enforcement • Bulky item pick-up during the renovations • Job training outreach.

SEVERSVILLE COMPREHENSIVE COMMUNITY REVITALIZATION PLAN

WHERE: Seversville, a residential neighborhood just west of the Five Points intersection and adjacent to Johnson C. Smith University.

WHO: The City, the Charlotte-Mecklenburg Housing Partnership, the Northwest Corridor Community Development Corporation, Johnson C. Smith University, Habitat for Humanity, the Charlotte-Mecklenburg Schools, The Seversville Community Organization, Seversville Partners, Family Housing Services and others.

WHAT: A Comprehensive neighborhood revitalization initiative to improve the quality of life for residents.

HOW: • Development of a 47-unit apartment complex for low-income families • Acquisition and rehab of rental properties for sale to low-income families • Construction of new in-fill housing on vacant lots • Credit counseling • Commercial development and revitalization • Job creation • Potential development of community center and neighborhood park.

CITY ROLE: • Infrastructure improvements • Enhanced and community-oriented policing • Housing and litter code enforcement • Relocation assistance • Housing rehabilitation • Job training outreach • Small business loans • Assistance in developing community center and community park.

FUNDS COMMITTED TO DATE: CITY - $195,000 loan to CMHP for acquisition of the Old School Site • CMHP- $580,000 for apartment complex ° and $1.3 million over 4 years for homeownership opportunities.

ADDITIONAL

INFORMATION REQUESTED

ON

COUNCIL BRIEFING

City-County Consolidation

The following services are not necessarily a duplication of effort because the scope of work and/or target geographic area for services may be different. However, these are commonly viewed as a duplication of service.

Community Services (services to the public)

1. Arts, science, cultural facilities funding
2. Stormwater Programs
3. Transportation and Road Planning (County Engineering) and City DOT
4. Capital project design and project management (City and County Engineering)
5. Public Service and Information
6. Community Development

Internal Services

1. County Fleet Maintenance and City Equipment Services
2. County Data Processing and City CIS
3. County Radio Services and City CIS
4. County Buildings and Grounds and City Buildings and Grounds
5. County Mail and Print Shop and City Print Shop and Mail Services

Staff Functions (examples only)

Finance
Human Resources/Personnel
Office of Productivity Improvement/Internal Consulting
Legal
Clerk etc.

Question: **Provide Council with a breakdown of funds the City spends on regional entities.**

1. **Carolinas Partnership Regional Business Council**

   →FY92: $150,000

   →FY93: $150,000

2. **Centralina Council of Governments**

   →FY92: $ 67,309

   →FY93: $ 67,309

3. **Mass Transit Partnership**

   →FY92: $ 10,000

4. **Regionalism Coordination (regional cities initiative)**

   →FY92: $ 31,500

   →FY93: $ 19,000

Impact of State Legislative Actions
On City Revenues FY 84 Thru FY 92

New 3% Occupancy Tax
- enacted in FY 84
- generates $3.4m in FY 92
- dedicated to CCVB and Debt Service.

New 1/2% Sales Tax
effective in FY 84
- generates $5.7m in FY 92
- dedicated to Transit
- per capita distribution vs. point of collection

Motor Vehicle License Tax
- effective in FY 87
- generates $7m in FY 92
- rate has increased from $5 to $25 dedicated to Transit ($12.50), PAYG ($7.50) and General Fund ($5 00)

Increased Powell Bill Allocation
effective for FY 88
- increased dedication to cities from 1 3/8 cents to 1 3/4 cents per gallon of gasoline - generates $10.3m total in FY 92

New 1/2% Sales Tax
- effective in FY 87
- generates $5 7m in FY 92
- dedicated to Debt Service
- per capita distribution vs. point of collection

Repeal of Inventory Tax
- phased in over FY 87 - FY 89
- replaced with a reimbursement with little growth
- estimated loss in FY 92 $4 2m after reimbursement

Repeal of individual personal property (household) tax
- effective FY 88
- estimated loss of $1.8m in FY 92

Adjustments to Sales Tax

- repealed merchant's discount
- changed collection on out of county sales
- positive impact on revenue, amount undeterminable

Additional 3% Occupancy Tax

- effective FY 91
  generates $4 2m in FY 92
  dedicated to new convention center

New 1% Prepared Food and Beverage Tax

- effective in FY 92
  generates $6 3m in FY 93 (first full year)
  dedicated to new convention center

Withholding of local funds to balance State budget

- affected FY 91
  withheld $1 9m from funds due to the City

Freezing of state shared revenues and reimbursements

- amount of these funds distributed to local units in FY 92 and FY 93 will be frozen at FY 91 levels with any growth being retained by the state
  reduction in state shared revenues to cities for Clean Water Act funding
- estimated loss of $1 4m in FY 92 and in FY 93

City Council Workshop Follow Up

What can be done on Channel 32 to further publicize City services and programs?

Plans are currently underway to focus Channel 32 programming on customer service and the value citizens receive for their City tax dollars. Specific enhancements to programming include

- Bulletin Board Information A new and revamped bulletin board with information on City services, programs and activities will be activated in several weeks. Information will change more frequently with the focus on City services in a new section called At Your Service.

- New City Issues Program A new, live, one-hour call-in program will begin airing in April. The program will feature the mayor, City Council members and community leaders discussing current issues and answering viewers telephone questions. This program will replace Spectrum which was a 30-minute taped show.

- At Your Service A new, taped 30-minute video magazine featuring City services, helpful customer information and a featured department or program. This show will include information on how to obtain City services, who to call for what, answers to frequently asked questions and did you know information. Show will begin airing in late Spring.

- Other Programs Existing programs will also feature City Council focus issues on subjects such as City Within A City, Community Policing, Stormwater, etc.

In addition, the City will also produce a live, one hour call-in program on WTVI each quarter. The program will be hosted by the mayor and will include area elected officials and community leaders as quests. Program topics will be more regional in nature because of the coverage of WTVI's broadcast signal. The first program will air March 25. Shows will be rebroadcast on Channel 32.

CITY OF CHARLOTTE

TURNOVER RATES FOR
SELECTED JOB CLASSES - CITYWIDE
(By Calendar Year)

Job Class	1990 (%)	1991 (%)
3102 - Police Officer	8	5
3104 - Senior Police Officer I	0	8
3106 - Senior Police Officer II	0	1
3108 - Senior Police Officer III	0	2
3006 - Firefighter I	5	3
3008 - Firefighter II	1	2
3011 - Firefighter Engineer	7	4
1010 - Laborer I	20	14
1011 - Laborer II	13	14
1510 - Treatment Plant Operator	7	8
1105 - Equipment Operator I	13	4
1106 - Equipment Operator II	16	7
1036 - Sanitation Crew Chief I	7	8
2366 - Drafting Technician II	5	0
2003 - Administrative Officer I	7	8
2007 - Administrative Officer III	5	5
2211 - Accountant II	13	7
2310 - Civil Engineer I	2	2
2312 - Civil Engineer III	10	0
0003 - Office Assistant III	8	9
0004 - Office Assistant IV	10	4
0005 - Office Assistant V	6	10

CITY OF CHARLOTTE

TURNOVER RATES FOR
SELECTED DEPARTMENTS
(By Calendar Year)

Department	1990 (%)	1991 (%)
Police	6	7
Fire	4	4
Solid Waste Services	13	12
Transportation	11	9
CMUD	10	7
Total Citywide Turnover	8	7

ANNEXATION COSTS AND REVENUES

1991 Annexation Areas	Operating Costs (Million)		Revenues (Million)	
	1st year	2nd year	1st year	2nd year
1. Prosperity Church /Browne Rd.	$2.27	$2.16	$1.38	$1.71
2. Old Concord Rd./I-85	2.65	1.74	4.02	4.93
3. Plott Road	.60	.53	.42	.52
4. Margaret Wallace/Independence Blvd.	1.61	1.14	.81	.97
5. Beam Road	1.80	1.22	1.06	1.31
1991 Annexation Totals	$8.93	$6.79	$7.69	$9.44
1989 Annexation Area				
1. I-77 Corridor North	$3.59	$2.20	$.99	$1.16
2. Rea Road/Elm Lane West	1.03	.59	.97	1.16
3. Hemphill	.16	.13	.18	.21
4. Arrowood I	.52	.39	1.22	1.45
5. Arrowood II	.15	.12	.53	.63
1989 Annexation Totals	$5.45	$3.43	$3.89	$4.61

MAJOR CITY SERVICES
PROVIDED IN ANNEXATION AREAS

Police

- Anti-Crime and Drug Program (School Resource, Street Interdiction, etc.)
- Patrol Operation and Crime Prevention
- Felony Investigations
- Crime Laboratory
- Information Services (911 calls, Data Processing, Record, & Public Information)

Fire

- Fire Suppression, Emergency Medical Response, Hazardous Materials Control, Heavy Rescue, and Aircraft Crash/Rescue Services
- Fire Code Inspections
- Fire Investigations
- Public Education Programs

Solid Waste Services

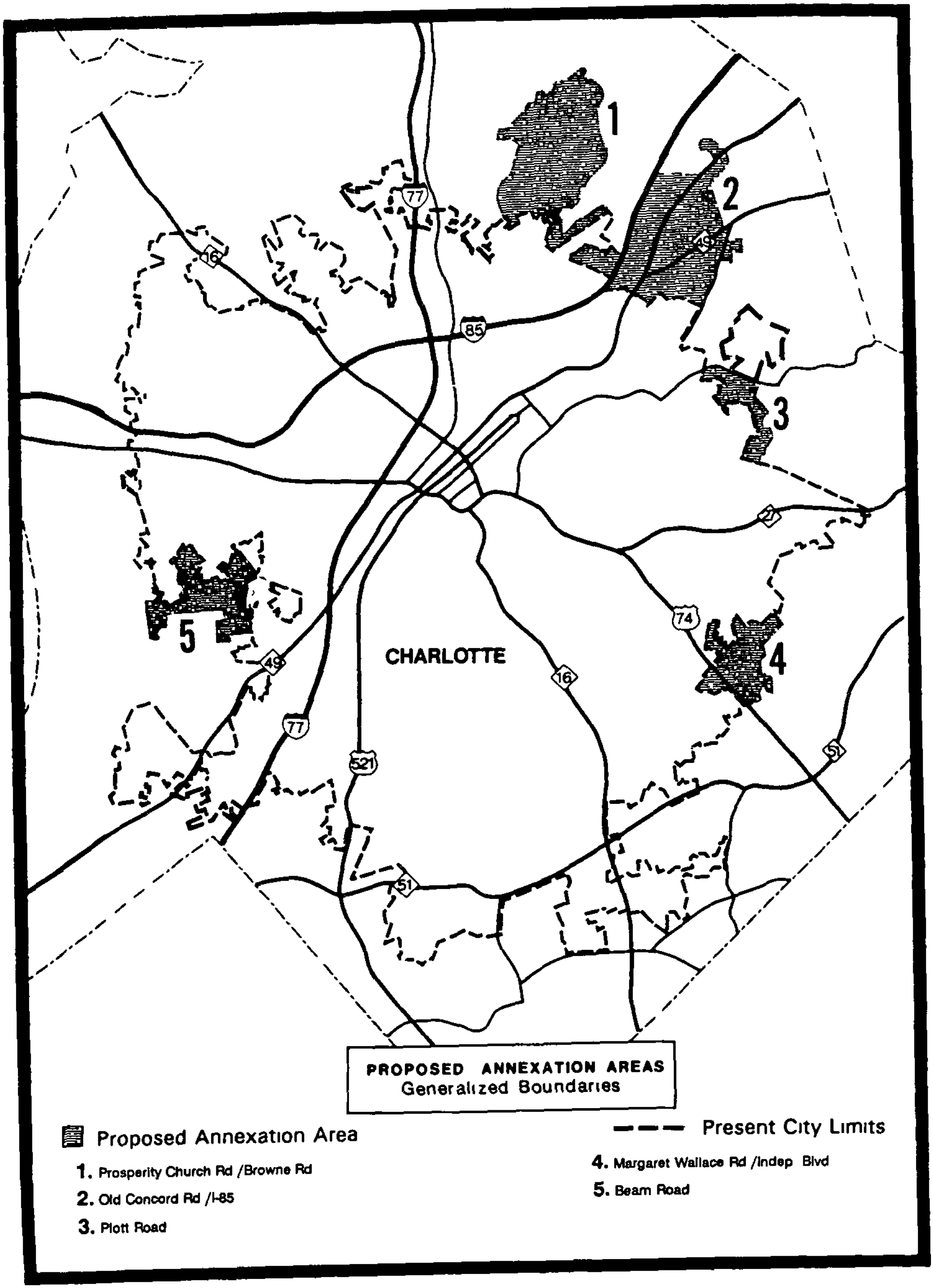
- Once-Weekly Backyard and Curbside Collections
- Recyclable Multi-Materials and Yard Waste Collections
- Enforcement of Litter and Abandoned Vehicles Ordinances
- Assist Neighborhoods in Anti-Litter Cleanup Campaigns
- Bulky Item Pick-Up and the U-Load-It Program

Transportation

- Build and/or Reconstruct Substandard Streets to City Street Standards
- Installation and Maintenance of All Traffic Control Signs, Signals, and Pavement Markings
- Surface Repair, Resurfacing, and Street Grading
- Storm Drainage Ditch and Shoulder Repair and Maintenance
- Transportation System Analysis and Planning

Water and Sewer

- Design and construction of the basic system of fire hydrants/water mains and sewer trunks in a manner consistent with the existing annexation laws and the May 1975 Water/Sewer Extension Policy. For example, water street mains are extended along residential streets, such that each residential structure is within 1,000 feet of a fire hydrant. The sewer trunks are extended to the low point in each street of the residential subdivision.


1
2
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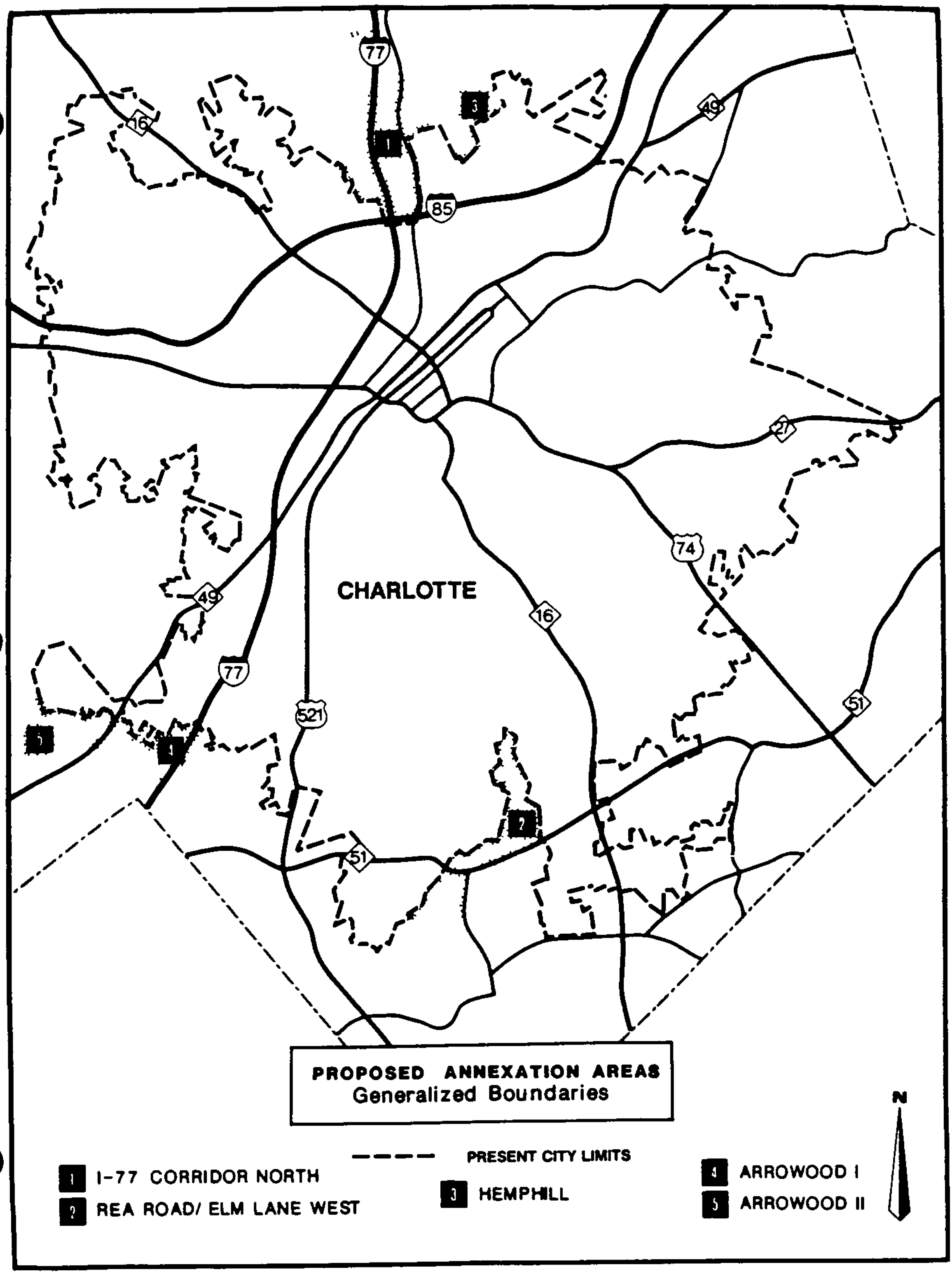
5
CHARLOTTE
77
16
85
49
521
51
74
21
PROPOSED ANNEXATION AREAS
Generalized Boundaries
Proposed Annexation Area
Present City Limits
1. Prosperity Church Rd /Browne Rd
2. Old Concord Rd /I-85
3. Plott Road
4. Margaret Wallace Rd /Indep Blvd
5. Beam Road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CHARLOTTE
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PROPOSED ANNEXATION AREAS
Generalized Boundaries
N
PRESENT CITY LIMITS
1 I-77 CORRIDOR NORTH
2 REA ROAD/ ELM LANE WEST
3 HEMPHILL
4 ARROWOOD I
5 ARROWOOD II

Municipal Annexation: A Review of National Trends with an Analysis of Annexation in Charlotte, NC from 1979 to 1989

August 22, 1990

by
Gary R Rassel, Ph.D
Jane A. Miles, M U.A.
Stephen A Coppola

Urban Institute
University of North Carolina at Charlotte

EXECUTIVE SUMMARY

Annexation is the primary means available for bringing areas already bound together economically and socially into a single political jurisdiction

This report.

- Summarizes the different methods of annexation in the U S
- Compares frequency of annexations among the states
- Reviews North Carolina's annexation statutes
- Evaluates Charlotte's annexation policy
- Reviews annexation in Charlotte from 1979 to 1989
- Summarizes financial information for annexation reports of all Charlotte annexations from 1979 to 1989

Reasons for Annexation

Many arguments have been promoted as justification for annexations These include

1) to provide services to fringe areas;
2) to maintain or increase the city's tax base;
3) to manage and control growth on the city's fringe; and
4) to require residents of the fringe already receiving municipal services to pay for those services.

When fringe areas become urban in character by virtue of development, they will need urban services, including police and fire protection, water and sewer services and others. When population densities reach certain levels, urban services are required to maintain the quality of life.

Annexation can be important in allowing the city to retain or increase its tax base. Urban cities in the Northeast have experienced problems with the inability to capture the tax base on their fringes. Many people moved to the suburbs, taking the tax base with them. Moving to the fringe of the central city allowed residents and owners of property to continue receiving the benefits of urban life, while avoiding some of its costs.

When cities are able to annex relatively undeveloped fringe areas, they can use zoning as well as other municipal authority to manage development. Other cities are able to manage growth when the state permits the exercising of zoning and subdivision regulation outside normal municipal boundaries.

Most suburban residents use and receive benefits from the services of the central city. This includes the use of roads, police and fire protection, and parks and recreation facilities, as well as the benefits of the city's economic development efforts. Residents move to the fringe of cities to have access to urban amenities. Bringing these residents into the municipality enables them to pay for many of these amenities.

The reasons for annexation show that all parties can benefit from annexation that is properly conceived and implemented.

Methods of Annexation

State annexation laws have been classified into five categories based on the primary institution or method entrusted with making the final decision. These five methods are 1) state legislatures; 2) popular elections, 3) municipal ordinance; 4) judicial boards and, 5) quasi-legislative or administrative boards. The state legislative and popular election methods have been found to reduce the ability of municipalities to annex Annexations are more likely to occur in states which entrust the annexation decision to judicial, administrative or municipal governing boards than in states depending on state legislative acts or provisions for popular votes. Annexation by municipal ordinance has been promoted on the grounds that annexation is a municipal decision and should be made at the municipal level.

Charlotte's Legal Responsibility

The North Carolina annexation law adopted in 1959 has been termed a "model law" by the Advisory Commission on Intergovernmental Relations (ACIR). This law permits municipalities to annex areas on their fringe as the areas become "developed for urban purposes." North Carolina is one of only 12 states permitting municipalities to annex by local ordinance.

In North Carolina, areas qualify for annexation by the following standards:

1. At least 1/8 of boundaries contiguous with municipal boundaries.
2. No part may be within another municipality's boundaries

and either

3. a. at least 2.00 persons per acre

   or

   b. at least:
      - 1.00 person per acre, and
      - 60% of acreage in lots 5 acres or less, and
      - 65% of lots are 1 acre or less

   or

   c. at least:
      - 60% of lots used for residential, commercial, industrial, governmental, or institutional purposes,

      and

      - 60% of all acreage not used for commercial, industrial, governmental or institutional purposes are in lots of 5 acres or less

or

4. Lies between existing city boundary and area "developed for urban purposes" and providing services to the land "developed for urban purposes" requires extension through the less developed area

or

5. Area is contiguous on at least 60% of its borders to any combination of city boundaries and boundaries of an area "developed for urban purposes"

All areas must meet the qualifications of 1 and 2, above. If an area also meets the standards of 3a, 3b, or 3c, it is defined as "developed for urban purposes." The other

standards are available for annexation of land that is adjacent to areas "developed for urban purposes."

The law also demands that areas annexed under these provisions must receive municipal services at substantially the same level as within existing city limits. In fact, Jake Wicker of the University of North Carolina's Institute of Government, who helped write the law, states that the primary purpose of annexation is to get services to fringe areas

The procedures for annexation mandated by North Carolina law are as follows

1 Prepare plans (report) for extension of boundaries
   a. Map with current/proposed boundaries, water and sewer lines, and land use patterns
   b. Statement of area characteristics, showing that areas meet the standards established in North Carolina law
   c. Statement of plans for extension of services at substantially the same level as in the existing city limits
   d. Statement of the impact of the proposed annexation on rural fire departments
2. Notice of public hearing
   a. Set day, time & place of public hearing
   b. Provide clear description of area, including map
   c. Make report above (Plans for extension of boundaries) available to the public 30 days before public hearing
3. Public hearing
4. Ordinance annexing territory may be passed after at least 10 days, but not more than 90 days following the public hearing
5. Effective date - at least 40 days and not more than 400 days after the date of the ordinance

The North Carolina Constitution permits new incorporation of municipalities near existing municipalities only with a three-fifths majority in each house of the General Assembly. This places some limitations on the ability of fringe areas to incorporate as a defense against annexation. The combination of state annexation law and incorporation law indicates a strong bias for: 1) providing municipal services to developed areas, and 2) having existing municipalities as the vehicle for providing such services.

Charlotte's Policy

Charlotte's annexation policy might be summed up by three statements

1) Annex as soon as areas meet the standards;
2) Do not discriminate based on the fiscal impact on the city, and,
3) Work toward orderly and amicable annexations

Annexing as soon as areas meet standards means that studies of fringe areas occur frequently (every other year), and that all areas around the city are studied for levels of development. This enables Charlotte to keep up with the growth that is occurring on its fringe

The policy of not discriminating against areas based on fiscal impact means that areas which do not currently have the tax base to support the services the city provides will still be annexed. These lower tax base areas will be annexed on the same schedule and in the same way as areas with ample tax base to support municipal services. Choosing not to annex areas where the additional revenues to the city do not meet the costs of extending services, while at the same time annexing high tax base areas against their wishes, has been labeled an abuse of annexation power by the Advisory Commission on Intergovernmental Relations (ACIR).

Charlotte has worked toward making the annexation process, which is often contentious, less so. In the past, it has adopted a policy of early notification to residents and developers in proposed annexation areas. When that failed due to competitive annexations by other municipalities, the City of Charlotte promoted and approved "spheres of influence" agreements with other nearby municipalities. These agreements have been credited with making annexations in Mecklenburg County much more amicable and predictable.

Charlotte's policy contributes greatly to the management of growth in the metropolitan area. Fringe areas are not allowed to become urban in character and remain without urban services. Charlotte's policy of annexing as soon as areas qualify, and of not discriminating against lower tax base areas, means that urban areas will receive services in an orderly fashion. These policies contribute to the perception of fairness in annexation.

Charlotte Annexation Planning

The annexation planning process in Charlotte embodies the city's annexation policy. The process includes the following:

1) Reports showing that areas exceed the statutory standards by as wide a margin as possible, to demonstrate that areas proposed for annexation are truly "developed for urban purposes";
2) Department projections of capital costs and first and second year operating costs for extension of services to annexation areas, and,
3) Finance Department projections of first and second year revenues from the proposed annexation areas.

Showing that areas exceed statutory standards by as wide a margin as possible contributes to the process in two ways. First, it demonstrates that areas are urban in character and, therefore, in need of urban services. Second, it limits opportunities for legal challenges to the annexation.

The cost and revenue projections are conducted to help the city plan for its future needs but are not a major consideration in annexation decisions. Indeed, to discriminate

against areas that need services, but without the tax base to support those services, would be an abuse of annexation powers

Charlotte Annexations 1979-1989

Between 1979 and 1989, Charlotte annexed 34 areas, 45 7 square miles and 53,880 new residents The 34 areas ranged in population from the Park Road/Quail Hollow's 8,444 residents, to the two annexations in Arrowood that had no residents The areas also ranged in size from about one-tenth of a square mile up to Raintree/Providence Plantation's 4.7 square miles.

First year revenues among the 34 areas are consistently and substantially lower than second year revenues, while first year operating expenses are consistently higher than second year operating expenses. First year revenues are lower due to the sales and intangibles taxes not being received until the second year Therefore, second year revenues and operating expenses give a better picture of the long term fiscal impact of an annexation area. Only four of these 34 areas were projected to have second year operating costs that exceeded the second year revenues from those areas

Six of the 34 areas required the construction of a new fire station. However, the added fire stations were usually intended to serve more than just the one annexation area. While the costs of construction of a fire station may be included in an annexation study, the area to be annexed may not be the sole recipient of the benefits.

Fiscal Impact of Charlotte's Annexation

A recent study presented evidence of economies of scale in the provision of services to citizens over the past twenty years and through numerous annexations While the individual tax effort and property tax rates have gone down, there is no evidence of a reduction in city services. In addition, the per capita assessed valuation in real dollars has increased over the last twenty years, providing the city with a greater tax base per capita, and allowing a decrease in tax effort.

Finally, annexation in Charlotte has improved the criteria upon which municipal bonds are rated. The city has been able to keep the costs of borrowing lower by virtue of its favorable bond rating.

Conclusions

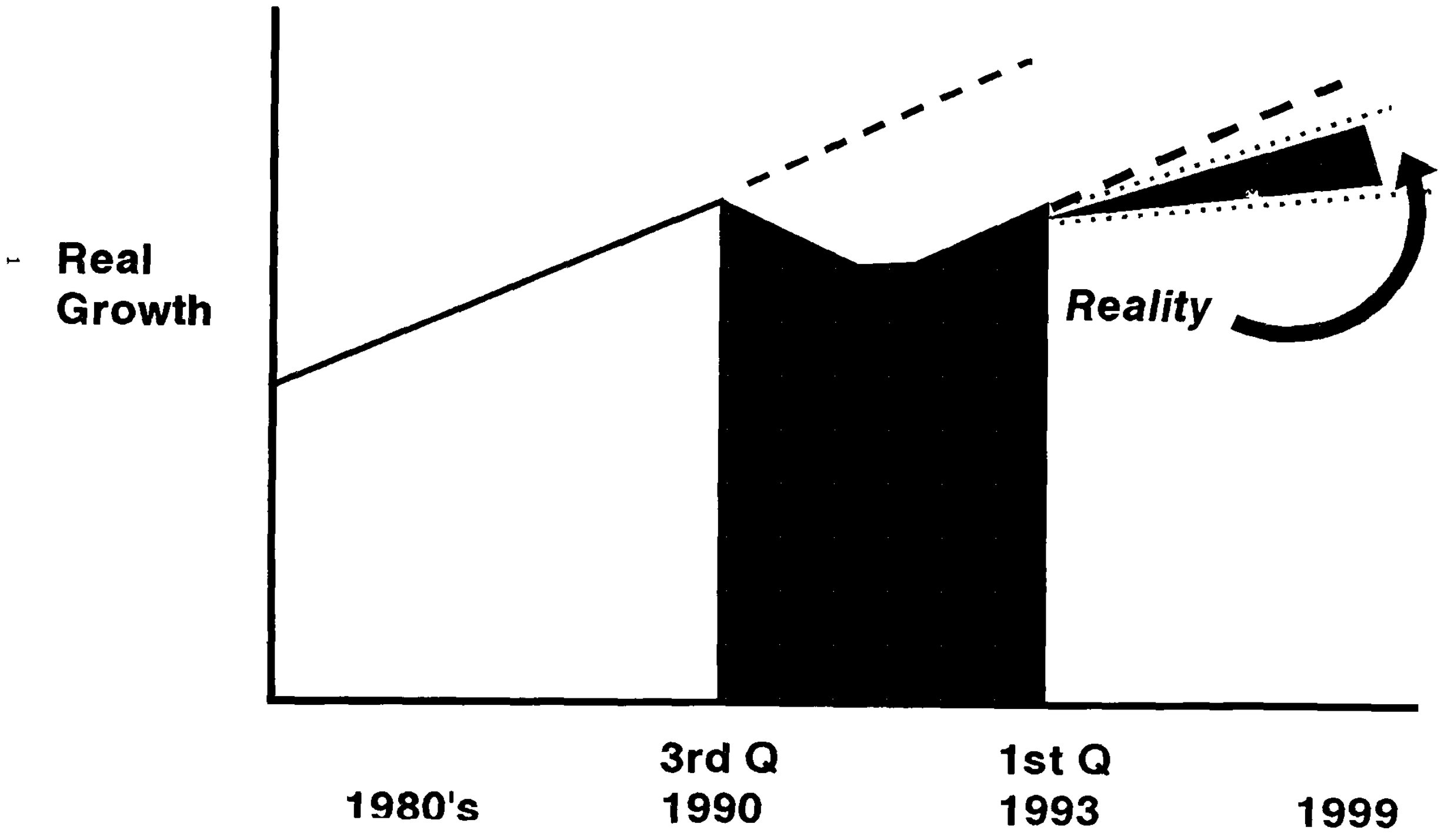
Charlotte's financial analysis seems to be of a much better quality than in most cities. Projecting costs within all departments, and examining each revenue source gives a relatively accurate picture of an annexation's impact.

Over the last ten years, annexations have enhanced the fiscal condition of the city Analysis of cost and revenue projections for the 34 areas annexed between 1979 and 1989 indicate that operating costs have been greatly exceeded by the additional revenues In addition, the city's tax rate has gone down over the period without a reduction in services to the citizens.

While, overall, the city has enhanced its fiscal condition through annexation, the policy of not discriminating against low tax base areas has resulted in annexation of some areas that return less in revenue than the additional costs of providing services. This is in keeping with the spirit and intent of North Carolina's annexation law and with the Advisory Commission on Intergovernmental Relations' judgment of proper annexation

FY93 GENERAL FUND
OPERATING BUDGET OVERVIEW

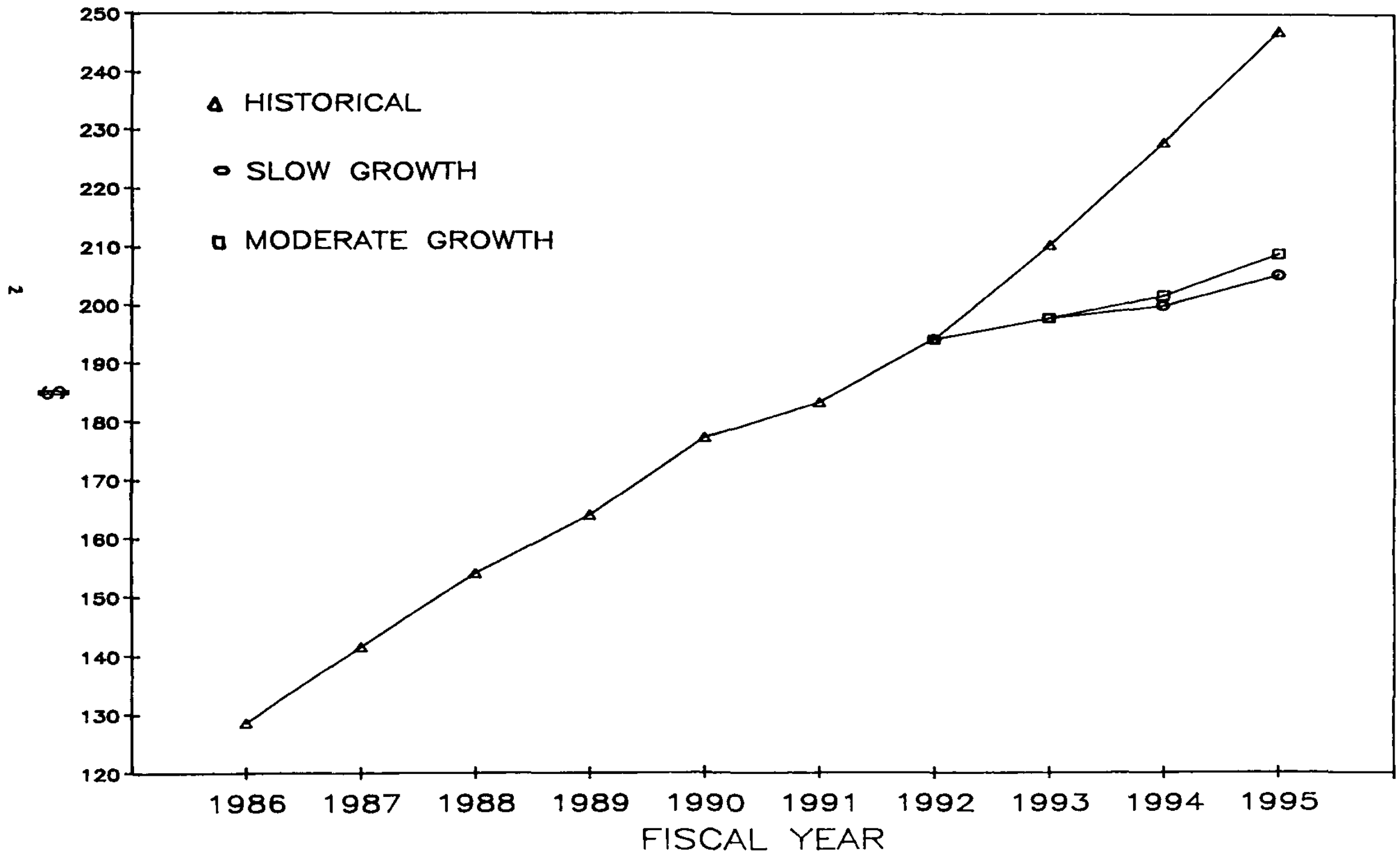
North Carolina's Economic Growth
Won't be as Rapid in the 1990s...



GENERAL FUND REVENUE PROJECTIONS

FY 93 – FY 95

(millions)



FY 93
BUDGET
STATUS

Trends and Conditions

- Slowdown in construction
- Legislature froze revenue
- Reduced retail sales growth
- Distribution of sales and intangibles taxes

GENERAL FUND REVENUE PROJECTIONS
FY 93 – FY 95
(millions)

SLOW GROWTH

	FY 93	FY 94	FY 95	AVG GROWTH FY 86 – FY 90
TOTAL REVENUES	$198.0	$200.2	$205.4	
increase in revenue	$3.7	$2.2	$5.2	
% increase	1.9%	1.1%	2.6%	8.37%

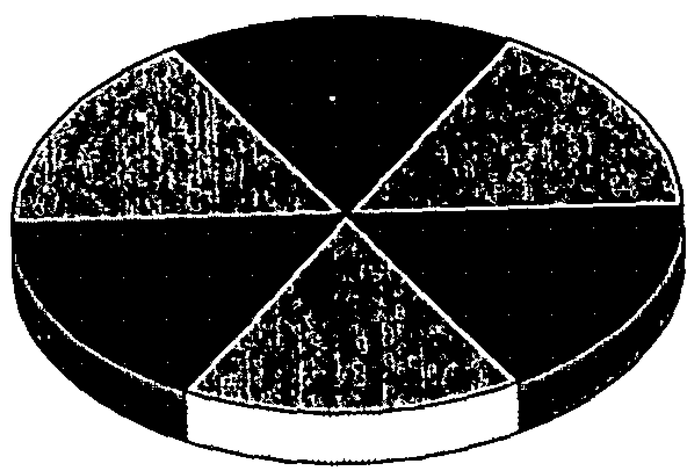
MODERATE GROWTH

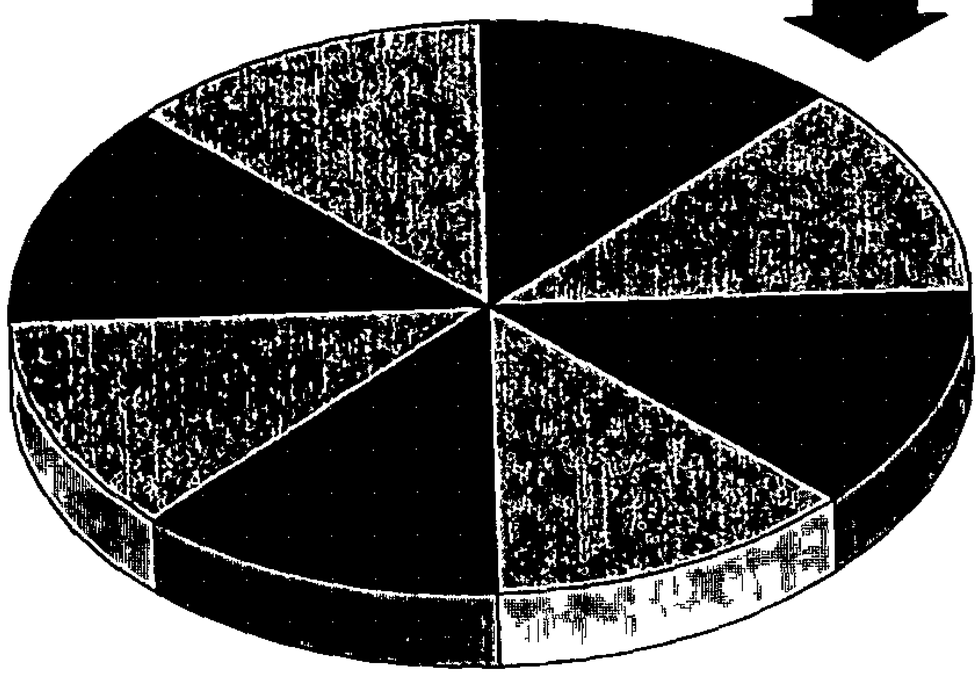
	FY 93	FY 94	FY 95	AVG GROWTH FY 86 – FY 90
TOTAL REVENUES	$198.0	$201.9	$209.0	
increase in revenue	$3.7	$3.9	$7.0	
% increase	1.9%	2.0%	3.5%	8.37%

As Demands Increase on Local Government

What are the choices...?

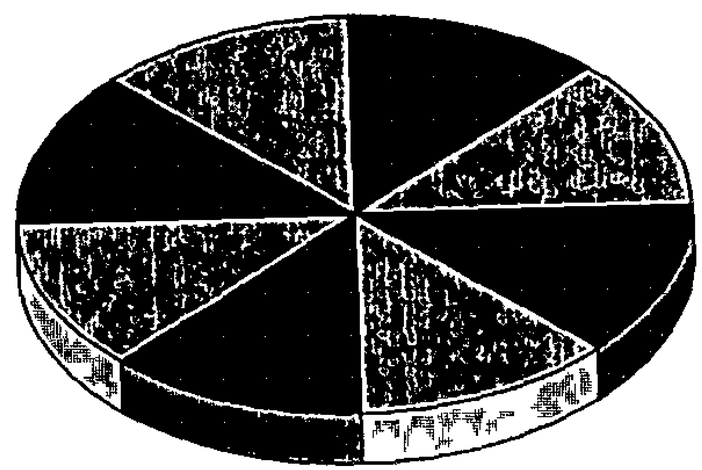
The '80s
Budget Pie





Bigger Pie?

And the
'90s

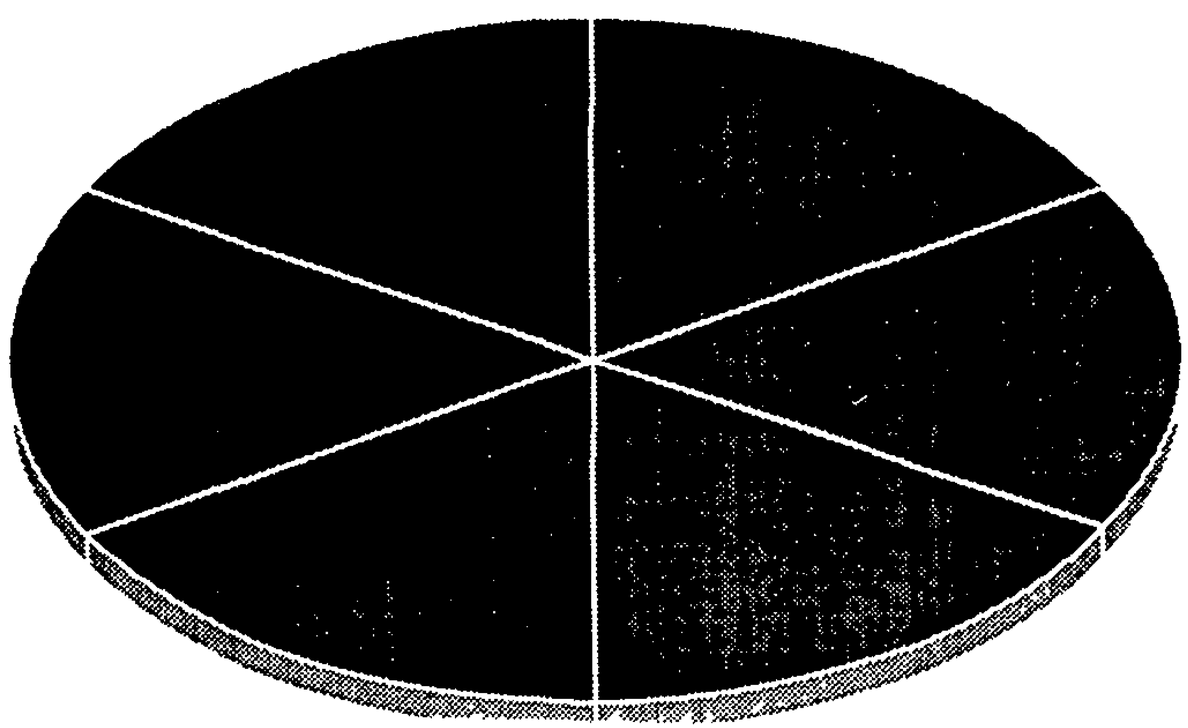


Smaller Slices?

The Challenge...

- **Will it be harder to be a Councilmember in the 1990s ?**

Slicing the pie...



FY93 GENERAL FUND RECONCILIATION

FEBRUARY 22, 1992

REVENUES

REVENUE SOURCES	ORIGINAL ESTIMATE	CURRENT ESTIMATE	DIFFERENCE
Property Tax ($ 55)	$120 5	$117 9	($2 6)
Inventory Reimbursement	6 6	6 8	0 2
Sales Tax 1%	24 8	21 8	(3 0)
Utility Franchise Tax	15 1	15 1	(0 0)
Intangibles Tax	6 2	5 8	(0 4)
SUBTOTAL	$173 2	$167 4	($5 8)
Other Revenues	29 5	30 6	1 1
TOTAL REVENUES	$202 7	$198 0	($4 7)
Transfers	0 4	0 4	0 0
Fund Balance Contribution	1 4	1 4	0 0
TOTAL GENERAL FUND	$204 4	$199 8	($4 6)

EXPENDITURES

Original Plan Revised

EXPENDITURE HIGHLIGHTS	ORIGINAL ESTIMATE	REVISED ESTIMATE	DIFFERENCE
Department Totals	$147 3	$145 7	($1 6)
Cost of 2 5% Pay Adjustment	0 0	1 4	1 4
Employee Fringe Benefits	29 7	33 4	3 7
General Insurance	5 1	9 3	4 2
City Within a City	0 1	0 1	0 0
Vacancy Rate Add Back	0 0	1 0	1 0
Other	22 2	22 2	0 0
Sub-Total Revised Original Plan	$204.4	$213.1	$8.7

New Departmental Requests

Police Workload - Investigations	0 0	0 7	0 7
Community Policing (100 Officers)	0 0	4 0	4 0
Street Interdiction/Drugs	0 0	0 5	0 5
Multi-Family Recycling	0 0	1 0	1 0
Sub-Total New Requests	$0 0	$6 2	$6 2
TOTAL EXPENDITURE REQUESTS	$204 4	$219 3	$14 9

OPTIONS TO BALANCE

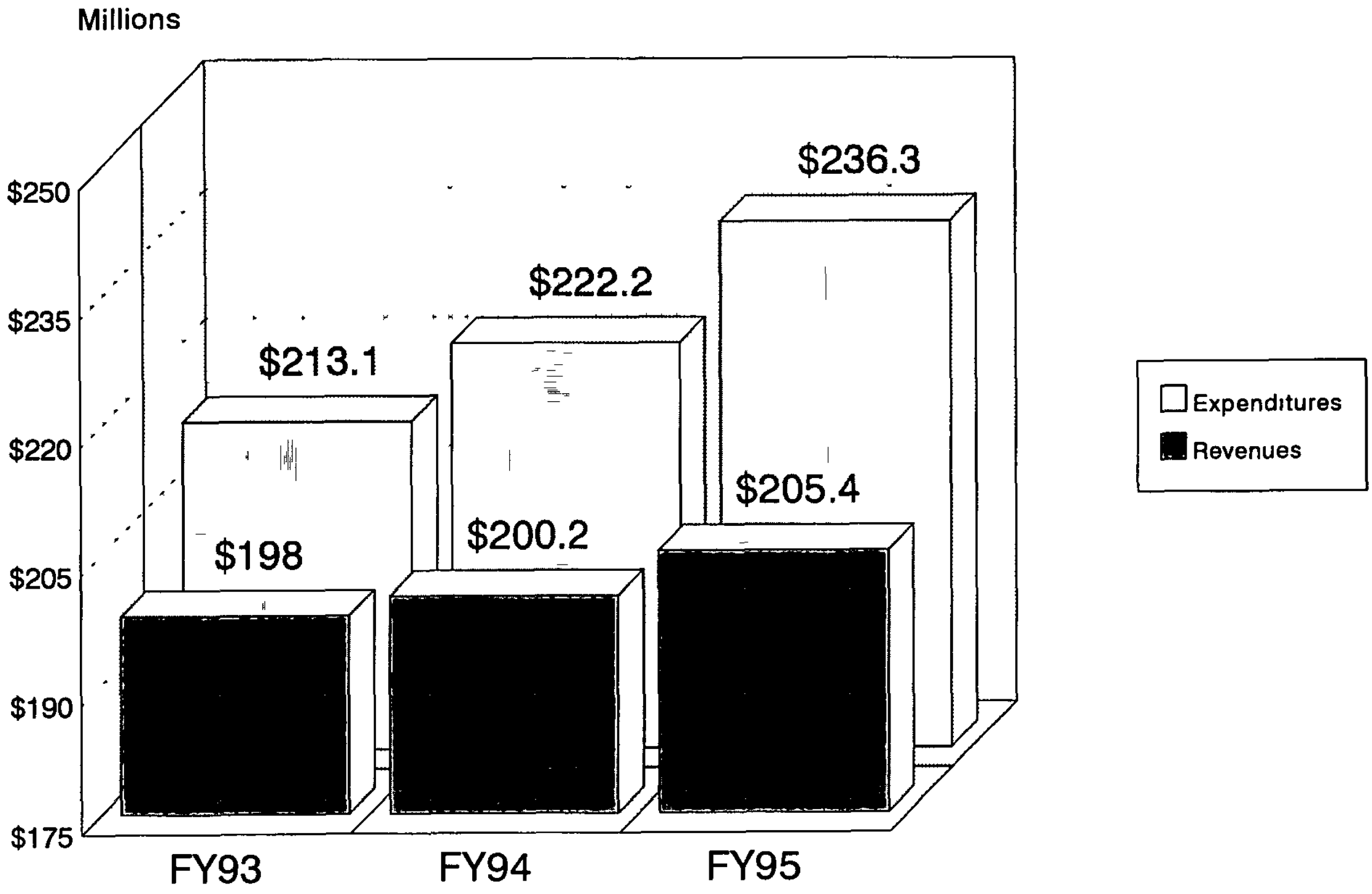
Hugo Reimbursement (revenue)	2 5
Pay-As-You-Go Transfer (revenue)	1.0
Debt Service Transfer (revenue)	?
Increase Fund Balance Contribution (revenue)	6 0
Reduction in Force (expenditure)	3 5
Increase Powell Bill Charges (expenditure)	2 5
OPTIONS TOTAL	$15.5 + ?

CITY OF CHARLOTTE
1992 COUNCIL RETREAT

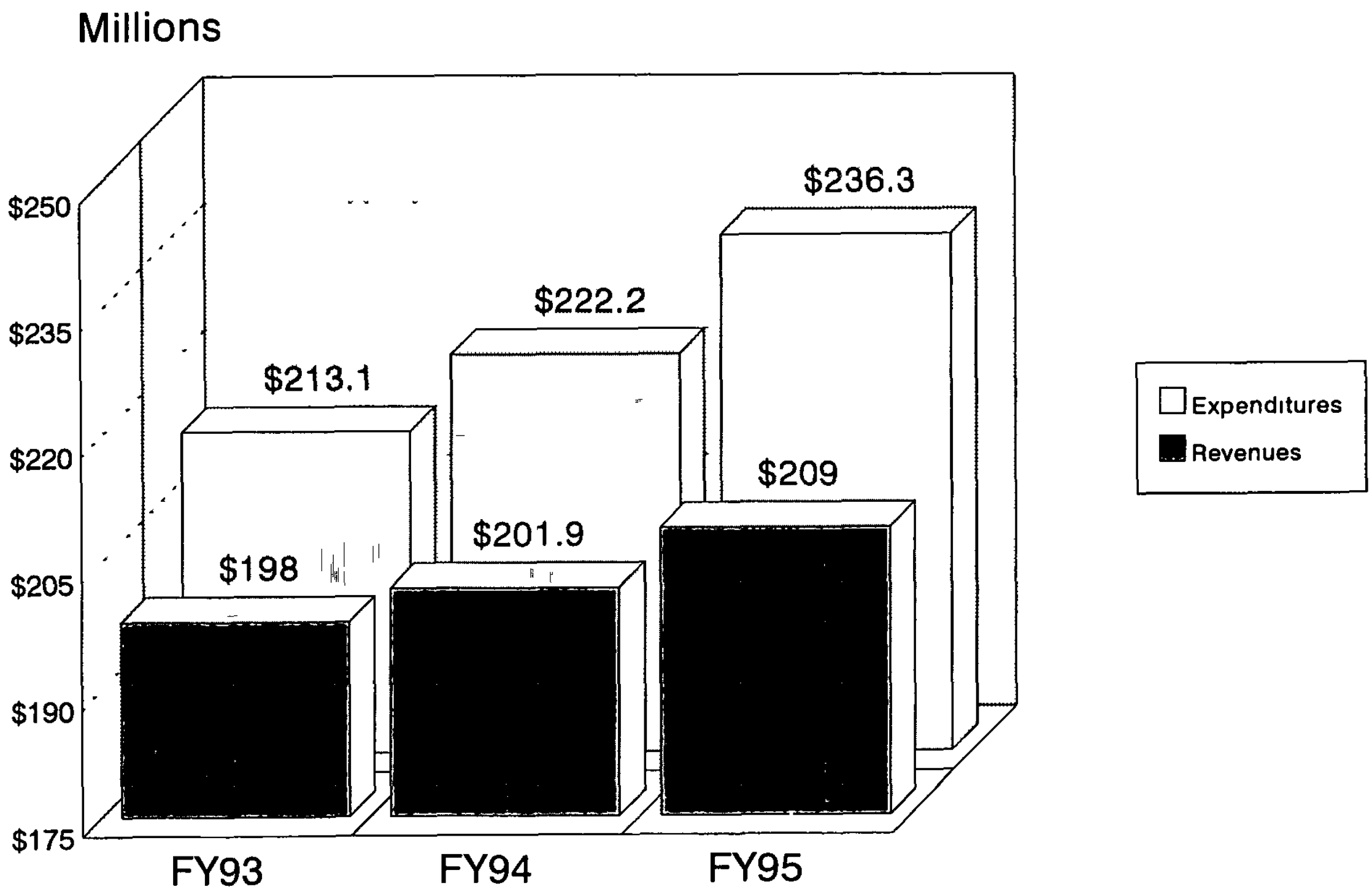
MAJOR UNFUNDED OPERATING ITEMS WITHIN EXISTING GOALS AND POLICIES

COUNCIL INITIATIVES	
Community Policing	$4,000,000
City Within A City	?
DEPARTMENTAL REQUESTS	
Multi–Family Recycling	$1,000,000
Drugs – Interdiction and Forfeiture	$450,000
Organizational Automation Needs	$500,000
Pay Adjustment	?
OUTSIDE REQUESTS	
Performing Arts Center	$300,000
District Attorney Assistance	?
Outside Agencies	$150,000
Criminal Justice Commission Operating Costs	?
Hildebrandt Study	?
INCREASED OPERATING COSTS	
Employee Health Insurance	$3,700,000
General Insurance – Liability – Worker's Compensation	$4,200,000

PROJECTED GENERAL FUND REVENUES & EXPENDITURES, FY93-FY95
Slower Growth Projection



PROJECTED GENERAL FUND REVENUES & EXPENDITURES, FY93-FY95
Moderate Growth Projection



18 MONTHS TO ACT

DIFFERENCE OF	$20 m
Tax Rate	8 cents
Workforce Reduction	15%
New Revenues	?

HOW?

RIGHTSIZING

CITY OF CHARLOTTE
1992 COUNCIL RETREAT

IMMEDIATE UNFUNDED NEEDS
REQUIRING FUNDING

Program	Five-Year Cost
Environmental Clean-Up	**$26 0 million**
Statesville Landfill	
York Road Methane	
Leaking Underground Storage Tanks	
Fire Pits	
Operational Facilities	**$5 2 million**
Solid Waste - Recycling	
LEC Parking Deck	
Fire Burn Building	
Building Maintenance	**$0 2 million**
Nature Museum	
TOTAL	**$31.4 million**

CITY OF CHARLOTTE
1992 COUNCIL RETREAT

FY93-97 CAPITAL PROGRAM
FUNDING STRATEGIES

FY93-97 Capital Improvement Program

1 Slow-down road construction program

2 Use road bond savings and unspent park bonds debt capacity for Environmental Bonds

3 Reallocate park capital program pay-as-you-go to operational and maintenance needs

4 Others

Future Strategies

1 Review all pay-as-you-go tax levy (3 25 cents) projects in conjunction with op operating needs

2 Review strategies to slow-down capital program (i e five to seven year pr project schedules)

3 Review existing planning policies (i e redefine objectives)

4 Others

CITY OF CHARLOTTE
1992 COUNCIL RETREAT

FY93-97 UNFUNDED CAPITAL NEEDS
(PRELIMINARY)

Program	Five-Year Cost
Environmental Clean-Up	$ 26 0
Statesville Landfill	
York Road Methane	
Leaking Underground Storage Tanks	
Fire Pits	
City Within a City	$ 71 5
Housing	
Commercial Revitalization Loans	
Day Care	
Transportation	$196 6
Local Road Projects	
Transit Expansion	
Light Rail Starter System	
Concourse Expansions	
Operational Facilities	$ 53 4
Solid Waste – Recycing	
LEC Parking Deck	
Central Yard Plan – Phase I	
Cultural and Tourism	$ 53 0
Aquarium	
Spirit Square Annex	
Water and Sewer	$ 36 0
New Water Main Extensions	
Rock River Outfall	

CITY OF CHARLOTTE

POSITION BANK: A procedure for the organization to continue to review position allocations in the context of rightsizing.

A HISTORY:

January 1991	Freeze on positions
October 1991	Budget Reduction Task Force reduces 34 Positions
December 1991	Freeze Accumulates 200 Vacant Positions
January 1992	Permanent Reduction of 200 (5%) of Workforce Made

THE POSITION BANK:

- Maintains accurate record of vacancies
- Establishes Benchmark to remain vacant for rightsizing
- Determines high/low priority needs for reassignment
- Designates funding for retraining

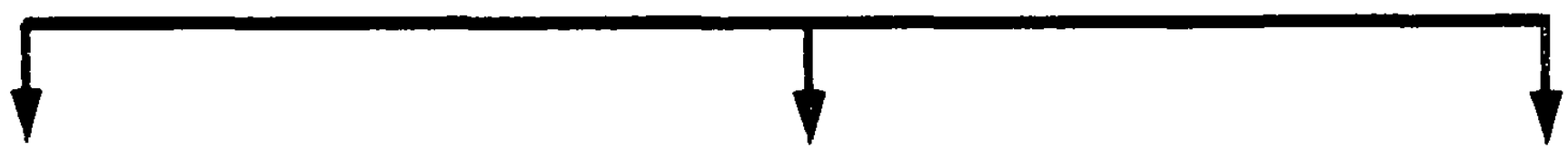
January 20, 1992

POSITION STATUS

GENERAL FUND AND GENERAL FUND DEPENDENTS

	CURRENT VACANCIES AS OF 1/29/92	POSITION COUNT HISTORY					
		FY93	FY92	FY91	FY90	FY89	FY88
MAYOR & COUNCIL	0	6	6	7	5	5	6
CITY MANAGER	4	25	25	24	14	14	13
CITY CLERK	1	4	4	4	4	4	4
CITY ATTORNEY	2	15	15	17	17	15	16
PUBLIC SERVICE AND INFO	1	21	21	20	19	17	17
ECONOMIC DEVELOPMENT	0	4	4	4	3	3	3
BUDGET AND EVALUATION	1	12	12	12	12	13	13
COMMUNITY RELATIONS	0	11	11	11	10	11	10
NEIGHBORHOOD CENTERS	1	25	25	27	27	29	29
PURCHASING	1	18	18	17	17	18	14
PLANNING	1	47	47	50	50	50	46
COMM AND INFO SYSTEMS	9	86	86	65	61	60	59
HUMAN RESOURCES	5	28	28	30	29	28	29
FINANCE	4	122	122	124	124	128	127
POLICE							
Sworn Personnel	20	881	881	818	755	700	686
Civilian Personnel	20	229	229	218	208	211	211
FIRE							
Uniformed Personnel	(9)	738	738	717	717	703	684
Civilian Personnel	4	75	75	67	67	68	67
TRANSPORTATION	20	417	417	414	145	145	136
GENERAL SERVICES	20	176	176	188	175	163	167
ENGINEERING	16	183	183	179	158	148	133
SOLID WASTE SERVICES							
Sanitation Workers	32	327	342	365	369	304	280
Other Personnel	8	125	125	116	382	350	350
ANIMAL CONTROL	4	60	60	63	53	41	41
PARKS AND RECREATION	47	326	322	313	305	297	301
MINT MUSEUM	3	38	38	41	41	41	41
(LESS 200 – POSITION BANK)		(200)	–	–	–	–	–
SUBTOTAL	215	3,799	4,010	3,911	3,767	3,566	3,483
EMPLOYMENT AND TRAINING	5	22	22	24	22	20	20
COMMUNITY DEVELOPMENT	7	58	58	59	58	57	61
HIRM	1	21	21	20	20	12	0
TOTAL	228	3,900	4,111	4,014	3,867	3,655	3,564

Position Bank



Reduction in Force	New Needs	Retrain
200	25	0
($3.4m)	$0	$100K

CITY OF CHARLOTTE

COMPARISON OF EMPLOYEES PER 1000 POPULATION

YEAR	POPULATION	GENERAL FUND EMPLOYEES	ANNEXATION POSITIONS	# EMPLOYEES PER 1000 POP.
1980	315,473	3242		10 28
1987	366 225	3428		9 36
1988	373,806	3406	77	9 32
1989	380,000	3566		9 38
1990	389,650	3672	95	9 67
1991	396,500	3911		9 86
1992	424,000	3831	179	9 46
1993	432,000	3799 estimate		8 79

POLITICAL CONSOLIDATION
Retreat Discussion Outline

I. Compelling Reasons for Consolidation According to the Mayor

- Regional competition
- Scarce resources
- Criminal justice system problems
- Priorities
- (others provided by the Mayor)
-
-

II We Know What Process Will Not Work. Citizen Committees

- 1970 Charter Study Commission
- 1984 City-County Consolidation Study Committee
- 1991 Charlotte-Mecklenburg Consolidation Charter Study Commission

III Council Discuss Values for Deciding if Consolidation is a 1992 Focus Issue

- What are the primary values by which to judge consolidation?
- Given this value, what are the issues?

EXAMPLE

Values	Issues
Decision Making	Full or part time elected officials
Leadership	Strong or weak Mayor
Speak with one voice	Include small towns?
Accountability	Big government

IV Council Decision **Is Consolidation a Focus 92 Issue?**

- If yes, Mayor proposes process for Council Discussion
- Proposed Process
  - a Mayor sends all elected officials a "value/issue" questionnaire
  - b. Mayor reviews results of questionnaire
  - c Mayor sends results to committee of 2 Council members and 2 Commissioners for short review
  - d. Council and Commission decide to stop or continue process
  - e Mayor meets with elected officials to answer the issues
  - f. Charter Committee appointed to write new Charter

SUMMARY OF SELECT REGIONAL ORGANIZATIONS

Carolina Issues Academy

The Carolinas Issues Academy at the University of North Carolina at Charlotte is a catalyst for applied research and education focusing on the Charlotte Region As an interface between the faculty and regional leadership, the Academy is an idea broker It publishes a regional newsletter, offers legislative briefings, and faculty seminars on regionalism. Each fall the Academy hosts a major conference on one regional issue The university's Urban Institute and Office of Continuing Education and Extension co-sponsor Academy activities The Academy's annual regional conference will be held October 14, 1992, focusing on the Charlotte Region as part of an international, interdependent global network

Centralina Council of Governments

The Centralina Council of Governments (COG) is the primary regional planning agency in the Charlotte Region Centralina COG serves as a forum for local governments from eight of the region's 13 counties to address current problems and future needs Centralina's services are funded by member dues, state and federal contracts, and fees for specialized services Leadership is provided by a Board of Delegates from the counties, cities, and members' towns in the eight counties Centralina is one of 17 North Carolina COGs formed in 1968

Centralina COG provides community planning and technical assistance to local government members in the areas of land development plans, zoning ordinances, neighborhood improvement plans, water and wastewater system studies, capital improvement programs and mapping Centralina also administers state and federal service planning, emergency services, aging, workforce training, and economic development programs For example, the agency oversees the Centralina Development Corporation which, since its inception in 1982, has funded 96 new economic development ventures in the region

Centralina COG maintains a Regional Data Center for eight counties with population, education, employment, transportation, sales and utilities data By special agreement, Centralina provides technical assistance to regional efforts and conducts a wide variety of regional and local studies For example, Centralina is one of three COGs providing technical assistance to the Catawba River Task Force

The region's South Carolina counties, York and Lancaster, are served by the Catawba Regional Planning Commission, Catawba County is part of the Western Piedmont COG, and Anson County is served by the Pee Dee COG

Carolinas Counties Coalition

Formed in 1985 by county commissioners representing eight counties in North and South Carolina, the Coalition serves as a forum for discussing and dealing with concerns common to the counties represented. Among the tangible results of Coalition activities are the establishment of both the Carolinas Transportation Compact and the Lake Wylie Marine Commission Discussion of several multiple county projects also began with the Coalition For example, the establishment of a two-county, interstate special purpose water-sewer district and construction of a joint water treatment plant, serving Union and Lancaster counties, began at a Carolinas Counties Coalition meeting The Coalition meets quarterly Member counties are Anson, Cabarrus, Catawba,

Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Union in North Carolina and Chester, Lancaster and York in South Carolina.

- The Coalition's April 2 meeting in Charlotte at Spirit Square will focus on crime and the criminal justice system

Carolinas Transportation Compact

The Carolinas Transportation Compact (CTC) was formed in 1989 to advocate regional transportation needs Funded by 13 counties, North Carolina Department of Transportation and the South Carolina Department of Highways and Public Transportation, the CTC's mission is to "serve the individual counties by establishing coordinated, continuing, comprehensive, and proactive efforts to acquire federal, state and local resources for planning, constructing, operating and maintaining adequate regional transportation facilities that enhance the quality of life in each county and the economic opportunity of the region "

- Through CTC efforts, the NCDOT, in cooperation with SCDHPT, contracted with Parsons Brinkerhoff in January to conduct a 12-18 month feasibility study for the proposed Carolinas Parkway, a regional "outer-outer" beltway approximately 30-35 miles from central Charlotte

- A 40-member regional task force, composed of local elected officials, is overseeing a $105,000 regional transportation authority feasibility study The task force is exploring whether or not this region wants regional public transit.

- CTC has summarized transportation-related demographic information for each of its 13 counties In addition, it is in the process of summarizing labor force data and site characteristics for two general locations for a future cargo airport facility

Carolinas Partnership

The one-year-old Carolinas Partnership is a marketing program funded by local governments, corporations and economic development organizations in 13 counties. The five-year $7 5 million program is aimed at attracting quality businesses and enterprises to the Charlotte Region By combining county efforts and resources, the Partnership aims to project a unified message about the region's strengths Under the direction of a 42-member board, its purpose is to increase awareness and knowledge of the Charlotte Region, attract national and international business investments, expand existing regional businesses, promote public and private partnerships in regional planning, labor training, and political cooperation, and develop a contingency fund to handle unique opportunities as they arise

- The Partnership's national and international advertising campaign was launched in late fall of 1991 with the completion of the 24-page booklet, "Our Future Grows Brighter Every Day "

- Through a Partnership initiative, Charlotte/Douglas International Airport will soon have a special regional marketing program with a VIP briefing center for use by members of the Partnership when hosting prospects

- Through Partnership funding, economic development offices in each county are linked by an interactive computer network dedicated to information sharing about economic development activities

Metrolina Economic Development Council (X)

Founded in the 70s to market the region, Metrolina Economic Development Commission (MEDC) now parallels the Carolinas Partnership membership MEDC was the stimulus for development of a regional economic atlas and several economic profiles, researched and written by the Urban Institute The organization is currently addressing a new mission focusing on professional development and special-topic educational programs for regional economic development executives

Regional Organization of Cities

Following a series of "city-to-city" meetings in the Charlotte region, seven cities — Charlotte, Concord, Gastonia, Kannapolis, Monroe, Mooresville, and Rock Hill — are considering forming an organization to identify issues and areas of cooperation between municipalities The group is discussing development of an urban agenda to ensure the health and vitality of the individual localities and the region A purpose of the organization is to communicate local government needs to legislative representatives The group plans to address issues related to transportation, economic development, environmental issues, crime and the preservation of small town identities Membership will include the mayor, city manager, and one councilperson from each of the participating "20-mile cities"

Catawba River Task Force

The Task Force, which was created following the 1990 Carolinas Issues Academy conference on the Catawba River, "seeks to preserve and enhance the quality of the Catawba River from its headwaters in the mountains of North Carolina to Lake Wateree, South Carolina, as a primary water source for citizens and business and as a unique environmental and recreational resource "

Voting Task Force members are local elected officials appointed by the five Councils of Governments along the river Seven of the counties with representatives on the Task Force are in the Charlotte Region — York, Lancaster, Mecklenburg, Gaston, Lincoln, Iredell, and Catawba Non-voting members of the Task Force are COG staff representatives, Duke Power, Crescent Land and Timber, and the Urban Institute

The first priority of the Task Force is preservation of the river as a high quality source of drinking water Other objectives include the sharing of information, conducting research, implementing public education programs and exploring solutions to developmental, recreational, and other environmental issues related to river use.

- The three N C COGs recently received a grant from the N.C Department of Health, Education and Natural Resources to do extensive water quality monitoring along the entire North Carolina portion of the Catawba River to identify problem areas

Lake Norman and Lake Wylie Marine Commissions

Created almost ten years apart, the Lake Norman and Lake Wylie Marine Commissions have vastly different powers The authority of the Lake Norman commission, which was established in 1969 by the N C General Assembly, is far less than the newer commission on Lake Wylie, which was established in 1988 by Congress Both commissions are responsible for activities on the lakes such as navigational aids, piers and commercial uses of the lakes, including

pumping water out of the lake However, the Lake Norman commission's authority is advisory to the four county governments which it serves The Lake Wylie Marine Commission may make and enforce regulations applicable to Lake Wylie and its shoreline areas

Carolinas Leadership Program

To provide local leaders throughout the region with a greater understanding of issues which transcend county lines, the Urban Institute is developing a regional leadership program The aims of the program, which would accept 40 participants each year, are to increase understanding of regional issues and regional problem-solving processes Program organizers see that such a program will enhance regional thinking and cooperation among leaders from diverse communities throughout the 13 country Charlotte Region Program development is currently in the proposal stage, with a projected start-up date of late 1992

Charlotte Area Educational Consortium (X)

The purpose of the Consortium, an organization of community colleges, colleges and universities in the thirteen-county area, is to encourage multi-institutional use of resources Full-time undergraduate students at member institutions are eligible to enroll in courses at other Charlotte Area Educational Consortium schools without paying additional fees The Consortium sponsors faculty visitations as well as conferences and forums on issues in higher education

State Health Planning Coordination (X)

One of nine North Carolina Area Health Education Centers, AHEC provides health care information for health care professionals and coordinates graduate education and residency training programs as part of a statewide network Counties served are Anson, Cabarrus, Cleveland, Gaston, Lincoln, Mecklenburg, Rutherford and Stanley The state's Health Service Agency III office was phased out more than two years ago However, the region it served, which is contiguous with Centralina COG, is still used by the state as a planning region for a limited number of health services Generally statewide health planning functions have been decentralized and Mecklenburg County, for example, is a planning unit unto itself

Museum of the New South Established

A new museum has been established to collect, preserve and interpret historic material from throughout the region From an office in downtown Charlotte "Museum of the New South," newly-hired executive director, Robert Weiss, will work closely with other institutions in the region to develop exhibitions focusing on the New South period, roughly since 1880 The museum's work, directed from loaned office space in First Union National Bank, will be linked closely with other regional groups, particularly regional colleges and universities

Museum leadership, which describes the Museum of the New South as a grassroots project, plans to build an oral history archive based on interviews of individuals throughout the region The museum's first exhibition will be in Founders Hall at the new NationsBank building when it opens later this year Plans for a permanent museum site will be considered in the future