# AGENDA

| | |
|---|---|
| Meeting Type: | SPECIAL |
| Date: | 05/06/1997 |
| | BUDGET RETREAT |

City of Charlotte, City Clerk's Office

# City of Charlotte
# FY98 Budget Half-day Retreat

**May 6, 1997**
**2:00 p.m. - 6:00 p.m.**
**Room 267**

| | | |
|---|---|---|
| 2 00 p m | Public Funding for the Arts Task Force | Michael Marsicano |
| 2 45 p m | Charlotte-Mecklenburg Utility Department<br>Budget Overview<br>Optimization Impact<br>Water and Sewer Rates | Doug Bean |
| 3 30 p m | Competition<br>Competition Status Report<br>5-Year Competition Plans<br>Gainsharing | Doug Bean<br>Bill Spears |
| 4 15 p m | Transportation Services and Contracts<br>Marketing Contract<br>E-Z Rider | Jim Humphrey |
| 5 00 p m | Trolley Capital Project | Jim Schumacher |
| 5 30 p m | Review of Vacant Positions | Curt Walton |
| 5 45 p m | Budget Decision-Making Process | Pam Syfert |
| 6 00 p m | Adjourn | |

# May 6th
# Half-day Retreat Materials

**(Please place in Blue Half-day Retreat Notebook behind the last page of the April 21st materials.)**

# FY98 Budget
# Half-day Retreat

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# MEMORANDUM

**TO:** Mayor and City Council Members
City of Charlotte

**FROM:** Michael Marsicano
President

**SUBJECT:** Response to Council Questions

**DATE:** April 22, 1997

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I hope the City Council has had an opportunity to review the materials we submitted on April 7 in response to questions raised during the Budget Retreat on March 18 by individual City Council Members Subsequently, we have been asked to address a question about potentially controversial works on the applications submitted for review to the 1997-98 ASC Basic Operating Grants Committee.

We wish to confirm our intentions to respond with a report about the current grants review process at the scheduled May 6 Budget Retreat of the City Council During this time, we will review the time line for the citizens' review panel process and the evaluative approach to each application In addition, we will discuss the modifications ASC has made to the grants review process since the adoption of the Public Funding Task Force Report which specifically deals with the issue of controversial works

The May 6 Budget Retreat is timely since the citizens' review panels will be meeting April 22 through May 2 We will be in a better position to address the Council's questions following these review sessions

Thank you in advance for the opportunity to meet with the Council in an informal session which will afford us more time to thoroughly respond to the issues

227 West Trade Street • Suite 250 • Charlotte NC 28202 • Telephone 704 372 9607 • Facsimile 704 372 8210

# MEMORANDUM

TO. Charlotte City Council
Mecklenburg County Board of Commissioners
ASC Board of Directors

FROM Public Funding Task Force

THROUGH· Michael Marsicano, ASC President

DATE November 6, 1996

RE Public Funding Task Force Deliberations

## BACKGROUND

In June of 1996, the Arts & Science Council (ASC) pledged to appoint a task force of citizens to examine public funding for the arts and sciences in the wake of *Angels in America* In August of 1996, Mr William Simms, President of Transamerica Reinsurance, and Dr John Kuykendall, President of Davidson College, agreed to co-chair the Task Force of 27 individuals drawn from the diverse citizenry of Charlotte and Mecklenburg County During the months of September, October, and November 1996, the Task Force met on six separate occasions for a total of 12 hours

## INTRODUCTION

Despite diverse opinions on specific matters, all members of the Task Force are strongly in agreement that public funding for the arts and sciences enables gifted and creative members of our community to share their talent in a way which both expands our horizons and deepens the wellsprings of our common humanity. The arts and sciences are indeed windows to the human spirit, and our exposure to their best expressions, both classical and contemporary, enriches our lives individually and as a community. While there are occasions upon which people of good will differ as to the value of specific artistic and scientific works, we should all be grateful for the ways in which creative expressions of talented people enable us to enjoy and appreciate life more fully

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The following report represents the collective judgment of the Task Force which has been meeting to discuss the issues surrounding public funding We have experienced both joyful and painful moments in our deliberations, but we are all committed to establishing a strong foundation for public funding of the arts and sciences in our community We ask for your thoughtful consideration of our findings, which are divided into four categories Mutual Respect, Legal, Community Standards, and Process

## DECLARATION OF FINDINGS

### Mutual Respect

- Task force members believe that our great community supports the value and dignity of each individual citizen Accordingly, public funding of the arts and sciences must affirm the dignity of the individual and respect the right to self-expression

- Guiding principles of democracy are dignity, respect, inclusion, and tolerance of all and for all No group of citizens should be entitled to deprive or harm another group of citizens

- Throughout history, the arts, the sciences, and religious beliefs have intersected, and they continue to do so today Religious preferences are deeply rooted in the people of Charlotte and Mecklenburg County While the majority of our citizens may be informed by the Bible, public funding of the arts and sciences calls for a healthy respect for those who may be informed by something else

- Some cultural programming is controversial and may distress some individuals It is appropriate for citizens to disagree strongly on the merits of cultural programs as long as they tolerate and respect one another All individuals have the right and responsibility to voice their objections in a manner that does not ridicule or belittle others Confrontation can be avoided if concerted efforts are made to approach the community in search of common ground Cultural institutions that receive public funding are strongly encouraged to develop an understanding of the differing views that exist within our community and to consider these views in making programmatic decisions

- Public funding decisions in the arts and sciences will not violate the civil rights of an individual or a group, or violate the guidelines of the Arts & Science Council, nor shall they violate the four categories of guiding principles that constitute this declaration (Mutual Respect, Legal, Community Standards, and Process)

## Legal

- As American citizens, the Task Force acknowledges the United States Constitution as the supreme law of the land Cultural institutions receiving public dollars must inspire public confidence by abiding by the law In the City of Charlotte and Mecklenburg County, the legal tests for public funding of the arts and sciences are the laws and Constitution of North Carolina and the laws and Constitution of the United States of America. While many laws, statutes, and ordinances may guide public funding discussions, the whole range of law, be it common law or statutory law, is encompassed by the constitutional test.

## Community Standards

- The arts, sciences, and humanities reflect the high place accorded by the citizens of Charlotte and Mecklenburg County to our rich cultural heritage and to the fostering of mutual respect for the diverse beliefs and values of all persons and groups Believing that state and federal constitutions provide broad parameters of community standards, it is not necessary to define such standards Personal standards are not community standards, and uses of public funds cannot be limited to the preference of a majority The Task Force believes that community standards are upheld by a process of allocating public funds that assures maximum diversity on volunteer citizen panels

## Process

- There is no better way to determine artistic and scientific opportunities and constraints than through a process that involves groups of citizens giving their best judgments toward inherently subjective decisions Local citizen groups are the best source for making decisions about public arts and science funding The collective judgments of the numerous volunteer citizen panels at the Arts & Science Council is equally as advantageous and representative as that of the City Council and the Board of County Commissioners

- The Arts & Science Council should assure the City Council, the Board of County Commissioners, and the citizens at large that volunteer citizen panels are as representative and inclusive as is practicable Volunteer citizen panels must be drawn from the diversity of the Charlotte community beyond the traditional notions of race, religion, and gender; professional expertise must be balanced by ordinary citizens who can bring to the table common-sense concerns and wisdom Public sponsorship of the arts and sciences requires representation in decision-making from the broadest spectrum of the community Also, the Arts & Science Council should embrace citizens who have disagreed with past funding decisions as much as it embraces those who have supported those decisions

- The Arts & Science Council should establish a comprehensive program of public education regarding, and public access to, the guidelines and procedures for the allocation of public dollars An active approach to the dissemination of information is favored over a passive approach Nomination forms for service on volunteer citizen panels must be disseminated as widely as possible Citizens must have maximum access to timelines for grant application availability and grant application deadlines

- The general public should understand that the allocation of City and County dollars to the Arts & Science Council is not blank-check" funding To the contrary, the Arts & Science Council has orchestrated a rigorous and accountable review process of cultural institutions in selected areas For example, in the areas of fiscal responsibility, organizational management, and board diversification cultural institutions are under great scrutiny, they clearly understand the consequences of operating out of concert with these policies

- The Arts & Science Council grant application review process is designed to support high-quality programs Cultural institutions report on the results of their program menu for the year recently completed, as well as their program plans for the year ahead The package of programs is considered as a body of artworks and reviewed for balance, diversity, educational merit, excellence, public participation and community outreach. While potentially controversial performances or exhibitions have a place in the vast network of cultural programs in our community, these presentations must be handled with great care and respect.

- The City and County governments should continue their ongoing assessment and review of arts and science funding on a systematic basis

## CONCLUSION

With endorsement by general consensus, the Task Force submits this memorandum to the Charlotte City Council, the Mecklenburg County Board of Commissioners, and the Arts & Science Council Board of Directors. The Task Force respectfully requests the submission of this document into public record by both elected bodies The Arts & Science Council Board of Directors is asked to take the appropriate actions that weave these findings into policies, guidelines, and practices.

Thank you for your thoughtful consideration.

MM/kg

Attachment (List of Task Force Members)

tf6 doc

# CITIZENS' TASK FORCE

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University Park Baptist Church
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NC Blumenthal Performing Arts Center
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ARTS & SCIENCE COUNCIL
**1997-98 Basic Operating Grant Program**

(4/9/97)

Meeting Date ***Tuesday, April 22, 1997 - 8:00 a.m. - 6:00 p.m.***
Organizations Actor's Theatre, Children's Theatre, Charlotte Repertory Theatre, Theatre Charlotte

**THEATER PANEL**

Shannon G Smith, Chair — 348-1017
Director
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227 W Trade Street, Suite 2400
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Charlotte, NC 28232

Daniel M Boye — 892 2394
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Augusta M Brown — 372-7170
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Charlotte, NC 28232

ARTS & SCIENCE COUNCIL
**1997-98 Basic Operating Grant Program**

(4/8/97)

Meeting Date ***Thursday, April 24, 1997 - 8:00 a.m. - 6:00 p.m.***
Organizations Charlotte Choral Society, NC Dance Theatre, Charlotte Symphony Orchestra, Opera Carolina

**MUSIC/DANCE PANEL**

Marianne Battistone Norwood, Chair
President
S/D/F Educational Projects, Inc
2633 Richardson Drive, #6C
Charlotte, NC 28211
362-1230

or -

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B E Noel
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**ARTS & SCIENCE COUNCIL**
**1997-98 Basic Operating Grant Program**

(4/8/97)

Meeting Date ***Monday, April 28, 1997 - 8:00 a.m. - 6:00 p.m.***
Organizations Afro-American Cultural Center
Community School of the Arts
NC Blumenthal Performing Arts Center

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Charlotte, NC 28216

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Charlotte, NC 28202

**ARTS & SCIENCE COUNCIL**
**1997-98 Basic Operating Grant Program**

(2/26/97)

Meeting Date ***Wednesday, April 30, 1997 - 8:00 a.m. - 6:00 p.m.***
Organizations Carolina Raptor Center, The Light Factory, Discovery Place, Mint Museum

**EXHIBITIONS PANEL**

Gay Dillashaw, Chair — 364-6400
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Kevin Patterson — 595-3247
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8501 IBM Drive
Charlotte, NC 28262-8563

**ARTS & SCIENCE COUNCIL**
**1997-98 Basic Operating Grant Program**

(4/9/97)

Meeting Date ***Friday, May 2, 1997 - 8:00 a.m. - 6:00 p.m.***
Organizations Afro-American Children's Theatre, Charlotte Repertory Orchestra, Charlotte Children's Choir, innovative Theatre

**DEVELOPING ORGANIZATIONS PANEL**

T Michael Todd, Chair — 343-9700
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Charlotte, NC 28211

Juliana L MaGill, Marketing Associate — 348-1038
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Omega Performance Corporation
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Charlotte, NC 28217

# Competition-Based Gainsharing Plan

**Purpose of Proposed Plan**

Competition-Based Gainsharing is an incentive program which will be self-funded from savings achieved against 1) competitively-bid projects when the City is the low bidder, or 2) "optimization" projects "Optimization" is the application of benchmark standards (work processes, staffing, quality, etc ) developed during a successful competitive bid process to other similarly situated organizational units which have not competed Due to a need to reflect the unique nature of City services/business units, a number of individualized plans may be developed under the broad heading of Competition-Based Gainsharing

Competition-Based Gainsharing is consistent will our Human Resources Philosophy, congruent with other incentive plans and encourages continuous improvement by of the City organization The proposed plan will motivate employees to develop better and more efficient methods of performing work, making the City more competitive, saving taxpayer dollars and providing a direct monetary incentive to the employees who achieved the savings

**Process and Assessment**

- Work is identified for competitive bid or for optimization

**Competitive Bid**

- For work which is competitively bid, if the City submits the low bid and is awarded the contract, the organizational unit that won the bid would become eligible to participate in the Competition-Based Gainsharing Plan

- If the unit completes the work for less than the bid amount, up to one-half of the difference between the contract amount and the final actual cost will be shared with employees The total payout to an employee cannot exceed 25% of the employee's base rate of pay during the contract period

**Optimization Projects**

- If the principles of optimization are to be used, the organizational unit to which the benchmark standards are applied would become eligible to participate in the Competition-Based Gainsharing Plan

- If the unit completes the work for less than the benchmark amount (usually expressed in unit costs), up to one-third of the difference between the benchmark amount and the final actual cost will be shared with employees The total payout to an employee cannot exceed 17% of the employee's base rate of pay during the contract period

**Development of Plans/Approval**

- Individualized plans may be established to reflect the unique nature of a business unit/process Each Key Business Executive will develop the plan(s) to be used in their business unit, including plan structure, quality standards, how decisions will be made about the amount to be paid to each employee, etc

- All plans, whether competitively-bid or optimization, will require the prior approval of the City Manager Each plan should outline the following

  - Specifications for the bid/project, including a Memorandum of Understanding
  - Process for determining cost savings, including audit process
  - Performance and quality standards which must be met and how these will impact payouts, including whether there will be penalties on an individual or team basis
  - Whether there will be the potential for bonus awards above the basic amounts for significantly exceeding standards
  - How payout decisions will be made
    - Minimum savings which must be achieved before a payout will be made,
    - Percentage amounts to be paid,
    - Frequency of payouts, including whether partial payouts will be made during the year with a final payout at the end of the year
  - Eligibility requirements to participate in plan
    - Who/what level of employees will be eligible (for example, will managers, support staff or administrative staff be eligible?),
    - How long must the employee be in the unit to be eligible,
    - Whether temporary employees are eligible,
    - Performance levels that must be met to be eligible (for example, must be at Meets Basic or higher level to be eligible),
    - Disposition of employee shares when an employee does not meet quality, attendance, etc standards
  - How impact of incentive pay on overtime pay will be addressed

- The Key Business Executive's decision on payout is final and not grievable

**Disposition of Savings Not Awarded to Employees**

- The portion of the savings not paid to employees will be retained in a contingency fund in the business unit to cover possible cost overruns on other projects

# Transit Marketing Contract

**Background**

- During Council's review of the Department of Transportation's (CDOT's) FY97 budget, several Councilmembers expressed concerns about transit marketing expenditures, particularly funds spent on media advertising Council discussed the need for quantitative criteria to measure the effectiveness of the department's marketing expenditures

- In 1996, CDOT delayed a decision on a new marketing contract in order to

  1) review transit goals and objectives in the context of a broader transportation vision
  2) develop a transit marketing strategy

- CDOT has been assisted by Stegall and Castleberry (S&C) in developing a new Transit Marketing Action Plan The marketing action plan addresses several of the major goals of the 5-Year Transportation Plan approved by Council on January 31, 1997

  1) Increase transit ridership from 12 5 million to 17 5 million by 2002
  2) Expand vanpooling by 33 percent per year
  3) Expand carpool matches by 20 percent per year

**Marketing Communications Strategy**

- CDOT and S&C identified five **target markets** or audiences and **seven strategic approaches** for transit marketing This information was organized into a strategic matrix illustrating market segment, message, and strategic approach

- The proposed marketing strategy **reallocates a portion of the media advertising dollars** shown in the FY98-99 budget to prepare new marketing tools such as a "How to Ride Charlotte Transit" video and collateral materials supporting other action steps

- In order to evaluate the effectiveness of the new strategies being proposed, CDOT will conduct a **benchmark analysis** for each of the target markets so that quarterly monitoring can measure the success or failure of each action step

- The new marketing strategy prepared by CDOT and S&C is based on **increased partnerships** with businesses, educational institutions, social service agencies, and economic center associations

# PROGRAM REVIEW

## EZ RIDER TRANSIT SERVICES

### I. Background

CDOT began EZ Rider in 1994 to address requests from organizations such as the "Success by Six" program and the Amay James/West Boulevard Task Force for a low-cost, neighborhood-based service operating in the "City-Within-A-City" area.

EZ Rider North includes two routes which are centered on Johnston YMCA. The routes operate between 8:00 a.m. and 8:00 p.m., weekdays, and from 10:00 a.m. to 4:00 p.m. on Saturday. The frequency of service on each route is 60 minutes

EZ Rider West also consists of two routes with a focal point at Amay James Neighborhood Center. Operating hours are 8:00 a.m. to 8·00 p m., Monday through Wednesday, and 8:00 a.m. to 5:30 p.m. on Thursday and Friday. EZ Rider West service operates on Saturday between 10:30 a.m. and 4:30 p.m. The frequency on service on both EZ Rider West routes is 60 minutes.

EZ Rider's purpose is to provide direct connections for North and West Charlotte residents to nearby work sites, shopping areas, human service agencies, and recreation centers CDOT staff worked with Neighborhood Development and Johnston YMCA personnel to design the routes. EZ Rider offers fast, inexpensive transportation for those Charlotte citizens who do not have a car to make short-distance trips on a daily basis.

CDOT has contracted with private companies for EZ Rider operation. LATCO Enterprises, Inc. operated the service during its first year while CON-TOM, Inc. has operated EZ Rider for the past two years.

During 1996, EZ Rider patronage figures and costs were:

| | WEST | NORTH |
|---|---|---|
| Total Cost | $148,470 | $163,170 |
| Passengers | 49,809 | 38,113 |

During EZ Rider's three years of operation, CDOT has allowed the EZ Rider contractor to keep the 25¢ passenger fare as an incentive to provide good customer service and reduce City administrative costs. In FY96, CON-TOM retained $7,700 in passenger fares.

## II. EZ Rider Evaluation Criteria

In 1993, Council approved a ridership service standard of 8 passengers per hour to evaluate the productivity of EZ Rider routes. Attachment 1 summarizes the ridership criteria adopted by Council.

Attachment 2 indicates EZ Rider productivity by month and route for 1994 and 1995 while Attachment 3 provides this same information for 1996 and the first three months of 1997.

Since 1994, staff members from CDOT, Neighborhood Development, Johnston YMCA, and the contractor have monitored ridership monthly and met periodically to discuss ways to improve or maintain productivity. These reviews have resulted in numerous service adjustments which are discussed below.

EZ Rider West (Jackson Park)

As shown by the 1996-97 ridership graph included in Attachment 3, productivity has exceeded the 8-passenger standard over the past year. In June 1995, the route was extended to serve the Cityview Shopping Center on Freedom Drive. This is a major attractor of EZ Rider trips.

EZ Rider West (Revolution Park)

This route has historically been right at the 8-passenger patronage mark. Also in 1995, the route was changed to serve Carolinas Medical Center and Kenilworth Commons Center throughout the day rather than just on selected trips The Amay James - West Boulevard Task Force requested this change which has helped to increase ridership.

EZ Rider North (Bancroft and Norris)

As shown by its ridership graph, use of this route is trending upward following a September 1996 route extension. In response to customer requests, CDOT extended the route to two new locations – the Park 'n' Shop on North Tryon Street and Northpark Mall at Eastway Drive and The Plaza. This change plus some public information efforts by Johnston YMCA and CON-TOM personnel have boosted ridership close to the standard.

EZ Rider North (Carolinas Medical)

This route has had the lowest ridership since service inception, and a number of changes have been tried in order to increase usage.

In June 1995, the route was extended to Carolinas Medical Center, Presbyterian Hospital, Midtown Square, and Central Piedmont Community College (CPCC) on

alternate trips throughout the day in order to add four major trip attractions. On the other trips, the route served the Central Avenue business area, particularly the Harris-Teeter store at Central and The Plaza.

In September 1996, the service was modified again to operate to Carolinas Medical Center, Presbyterian, CPCC and Midtown on every trip. Johnston YMCA and Neighborhood Development staff members suggested this change as a way to promote more use.

## III. EZ Rider Customer Profile

In July 1996, CON-TOM, the EZ Rider contractor, surveyed passengers to determine who uses EZ Rider and why. Attachment 4 is a brief summary of the survey's findings.

Highlights from this survey include:

- Nearly three-fourths of EZ Rider passengers use the service three or more times a week.
- Grocery shopping the most popular reason for using EZ Rider
- Over half of EZ Rider users are travelling to or from medical facilities.
- Most EZ Rider passengers rode Charlotte Transit or walked before this service began.

## IV. Community Involvement of EZ Rider Contractors

As EZ Rider contractors, LATCO and CON-TOM have been supportive of community activities in north and west Charlotte. Both companies have provided transportation services at no charge to neighborhood groups and organizations such as:

- Project Hope
- Ponderosa Community
- Wingate Community
- Amay James/West Boulevard Task Force
- Charlotte-Mecklenburg Police Department
- Charlotte-Mecklenburg Schools
- Johnston Memorial YMCA
- Mecklenburg County Parks and Recreation
- Public Library of Charlotte and Mecklenburg County

## V. Recommendations and Conclusions

In 1994, Barton-Aschman Associates recommended expansion of EZ Rider service to

northwest Charlotte, in the Beatties Ford/Rozzelles Ferry Road area. The Northwest Enterprise Community Board endorses the expansion, and the recommendation was included in the 1995 "City-Within-A-City" Strategic Plan. In addition, neighborhood plans for Todd Park, Wingate, Seversville, and Druid Hills include implementation of an EZ Rider Northwest service.

CDOT's proposed FY98-99 budget includes continued operation of EZ Rider North and West plus expansion into northwest Charlotte, a new service recommended in the department's Five-Year Transportation Plan, approved by City Council on January 31, 1997

Changes to EZ Rider North (Carolinas Medical)

CDOT and CON-TOM have analyzed the use of the Carolinas Medical route operated in north Charlotte. There are several periods during the day when patronage is very low, impacting the route's overall productivity.

CDOT will eliminate five hours of service on this EZ Rider North route on weekdays -- 12:30 p.m. to 2·30 p.m and 5:30 p.m to 8.30 p m. The remaining 7 hours of service should be able to generate the 56 passengers per day required by the ridership standard.

EZ Rider Contract

On March 13, 1997, the City received proposals from 4 private transportation companies to operate EZ Rider for a 3-year period The award of this contract should be on Council's May 12 agenda.

With implementation of the new EZ Rider contract, the City will have the private operator return all passenger fares to the City. The recent RFP specified this change in fare accounting, designed to provide slightly more money for service provision.

Continued Monitoring of Productivity

Staff members from CDOT, Neighborhood Development, Johnston YMCA, and the EZ Rider contractor will continue to work with neighborhood leaders and others to ensure that the other 3 EZ Rider routes and EZ Rider Northwest meet the productivity standard.

# NEIGHBORHOOD DEVELOPMENT SERVICES EVALUATION CRITERIA

- Ridership will be monitored on a monthly basis. Ridership data will be used to focus service marketing efforts. Patronage results will serve as input to discussions with personnel from service agencies, Neighborhood Centers, etc. regarding route effectiveness.

- The first service evaluation will occur after 3 months of operation. Subsequent evaluations will be scheduled at 3-month intervals throughout the one-year demonstration period.

- The following ridership service standards will be used to evaluate the overall productivity of the two types of neighborhood services:

| | Passengers/Hour | | |
|---|---|---|---|
| | By 3rd Month | By 6th Month | By 9th Month & Thereafter |
| CROSSTOWN ROUTES<br>• City-Within-A-City<br>• Route 29 - Route 30 | 8 | 10 | 12 |
| NEIGHBORHOOD CIRCULATORS<br>• Amay James<br>• Johnston YMCA | 4 | 6 | 8 |

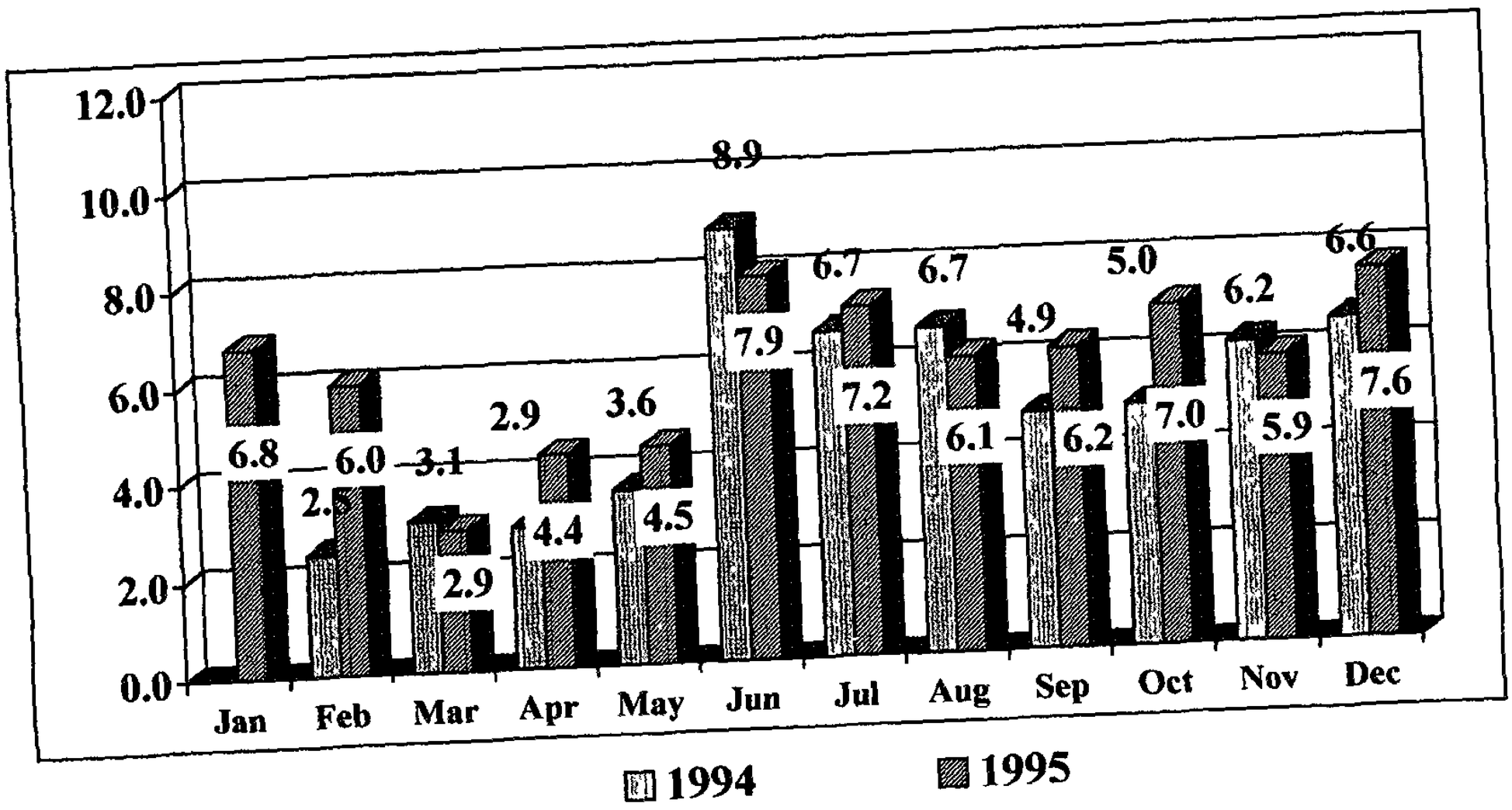
- As part of the review of each service, individual trips and route segments will be examined. At the 6 and 9 month evaluations, trips carrying fewer than 4 passengers (crosstown routes) and 2 passengers (neighborhood circulators) will be considered for termination. Non-productive route segments also may be eliminated in order to improve a service's performance to the standard.

- If route productivity has not reached the applicable standard by the end of the first year, service will be discontinued within 30 days. Service will not be terminated if a major route change surfaces which could increase productivity. This change will be evaluated after 3 additional months of operation, and a decision made on service continuation based on ridership results.

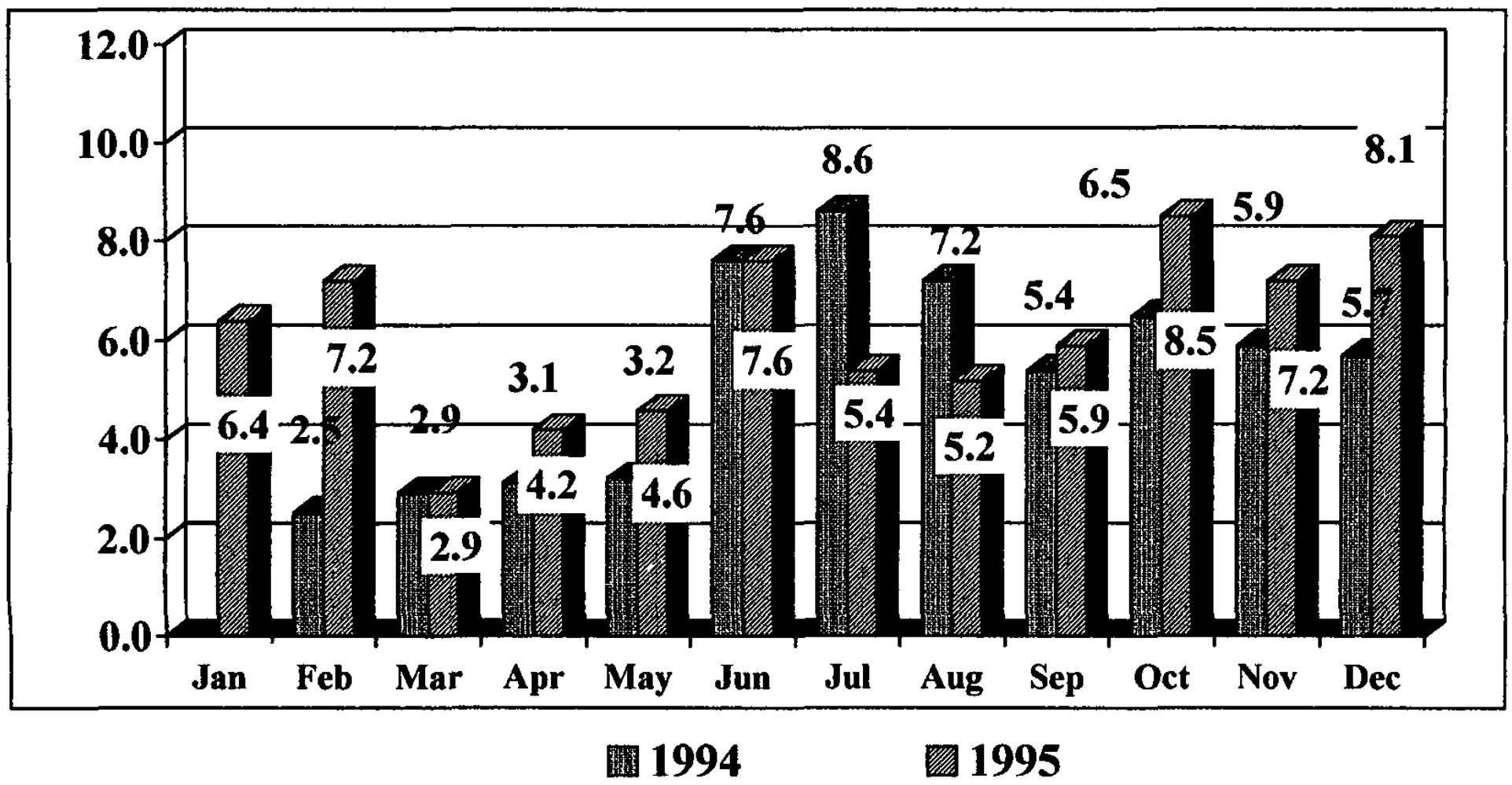
- After the one-year demonstration period, neighborhood transit services meeting the approved standards will be analyzed at 6-month intervals as part of Charlotte Transit's semi-annual systemwide evaluations.

lop21

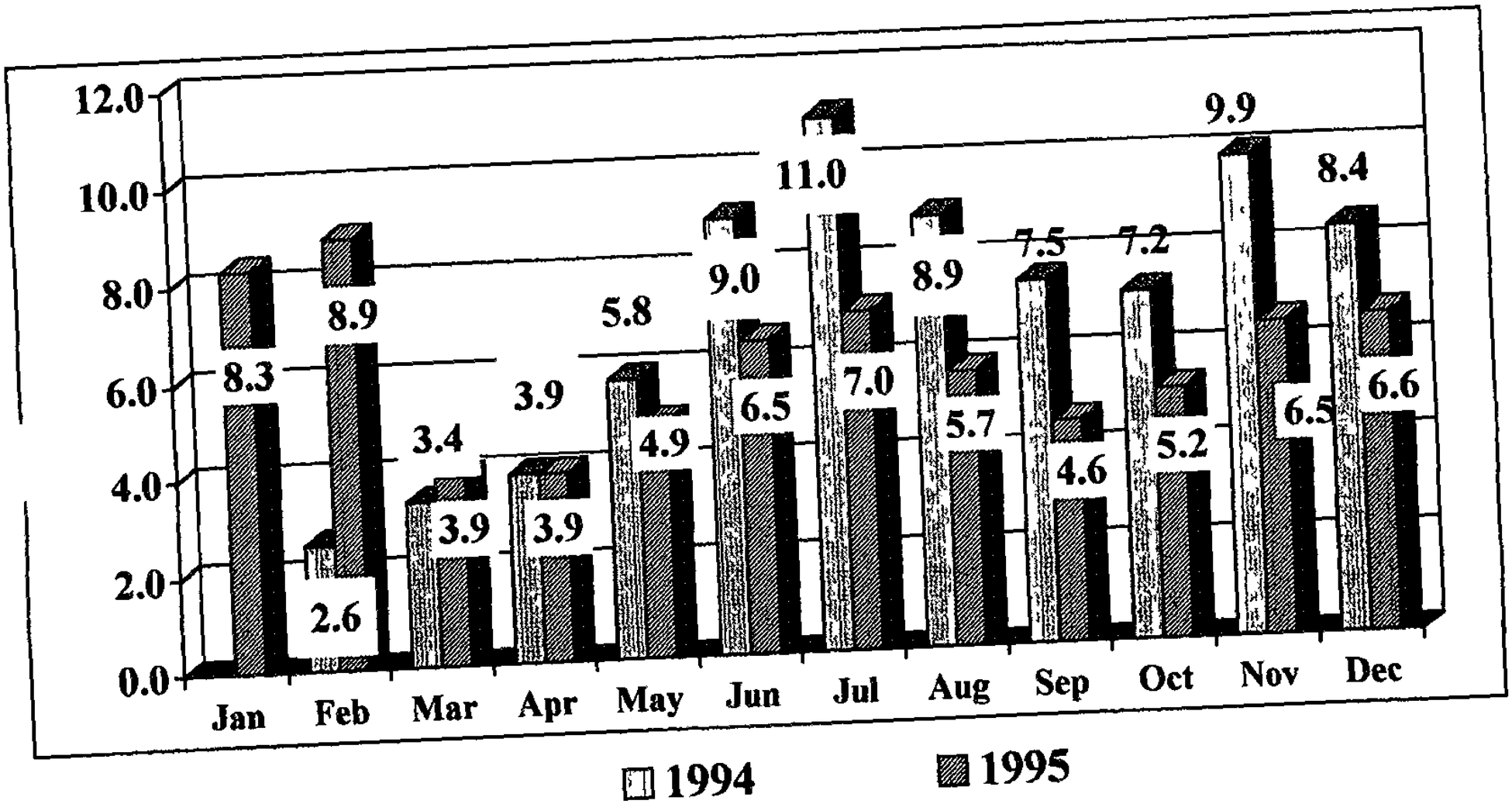
# EZ Rider
# Jackson Park
## Passengers / Hour



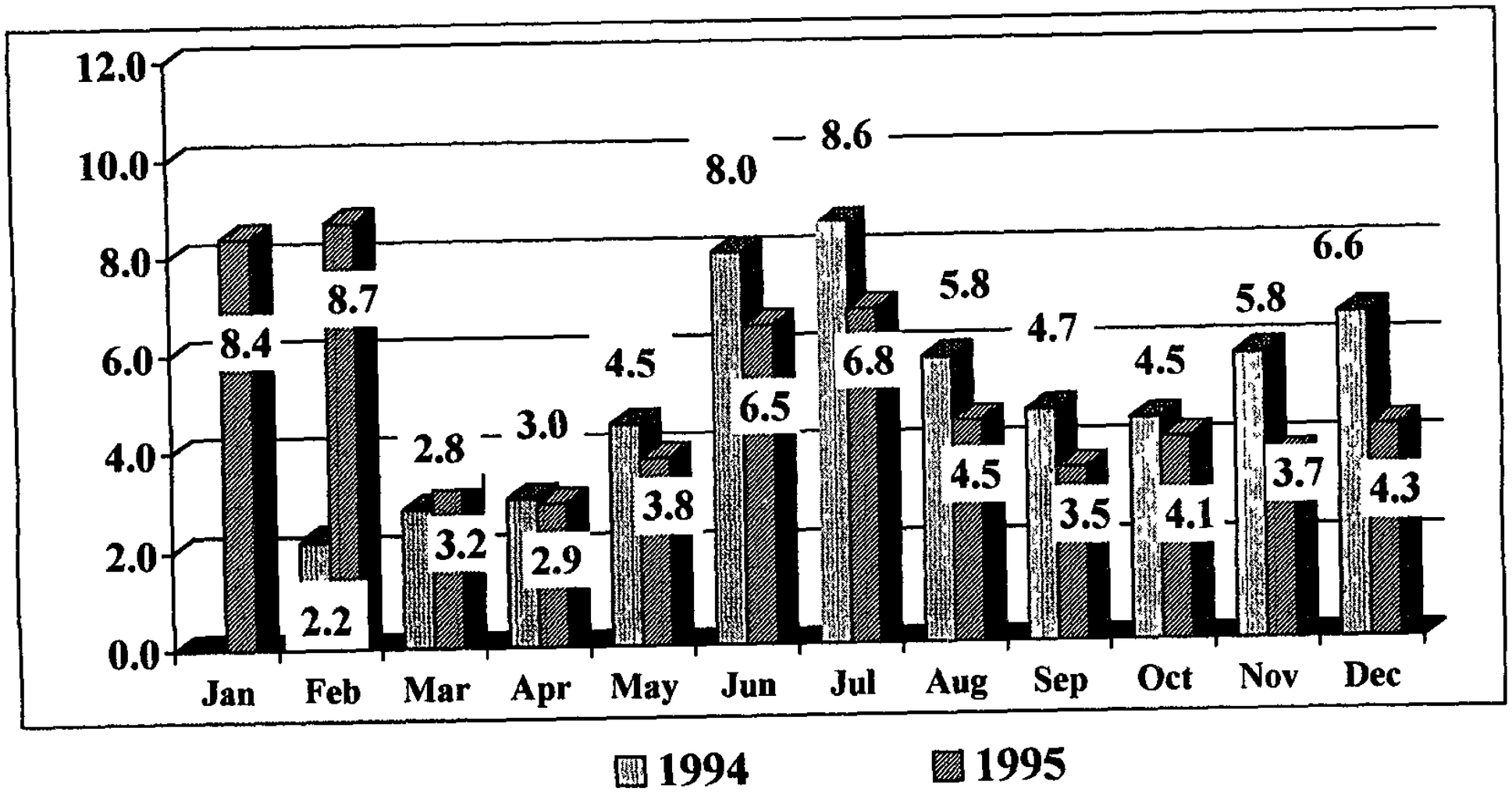
# EZ Rider
# Revolution Park
## Passengers / Hour



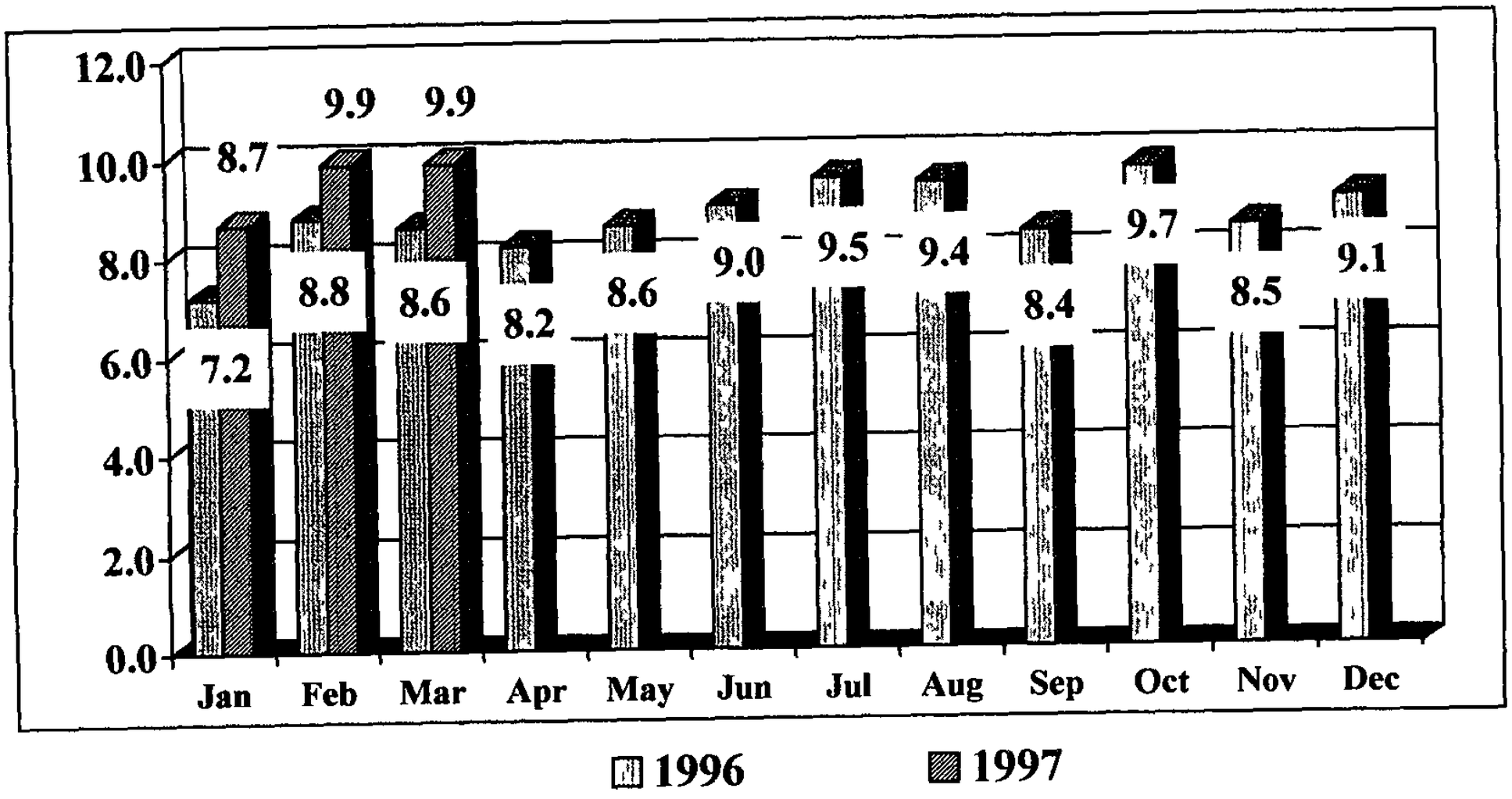
# EZ Rider
# Tryon Hills / The Plaza
## Passengers / Hour



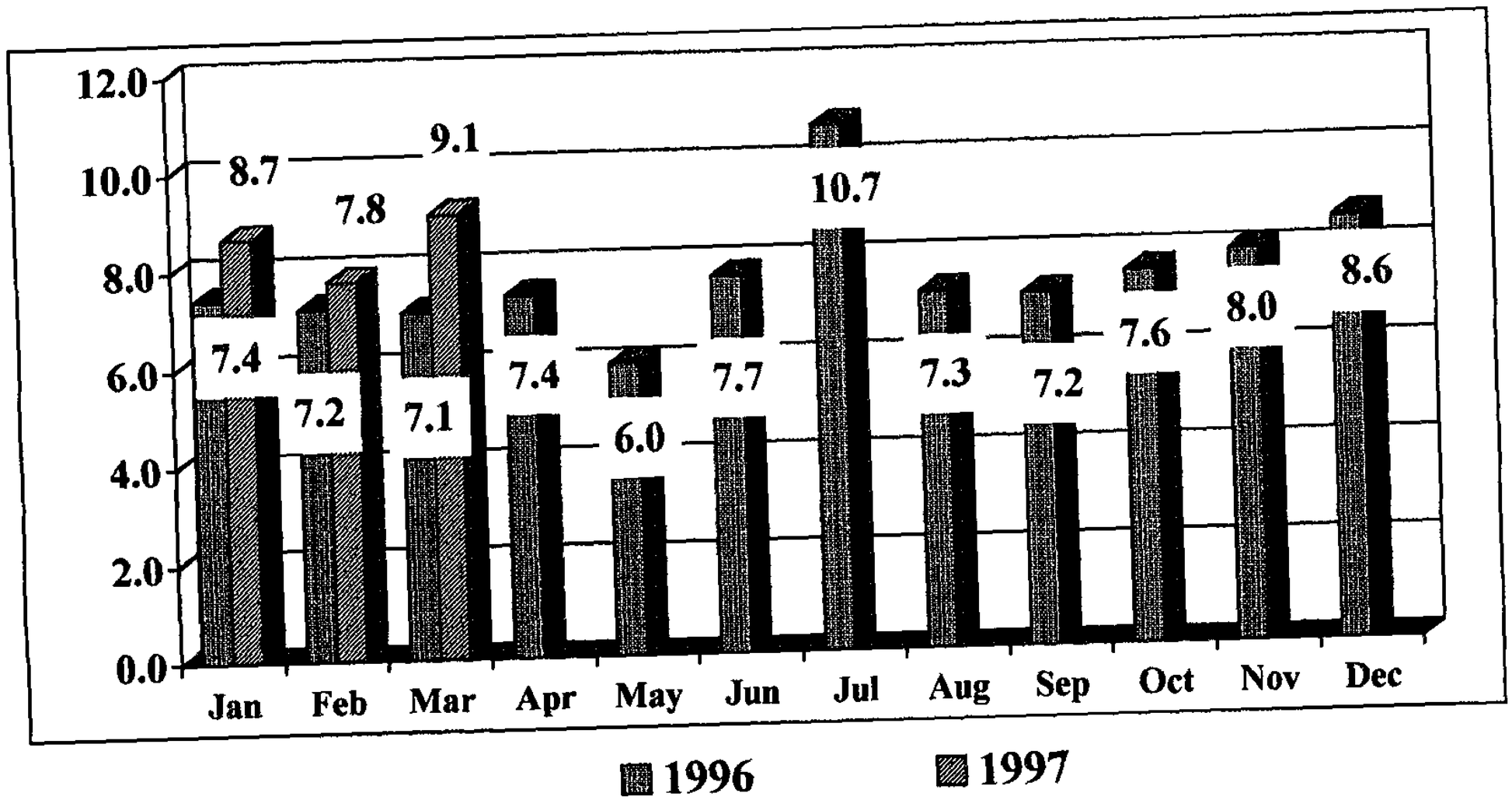
# EZ Rider
# Central Avenue
## Passengers / Hour



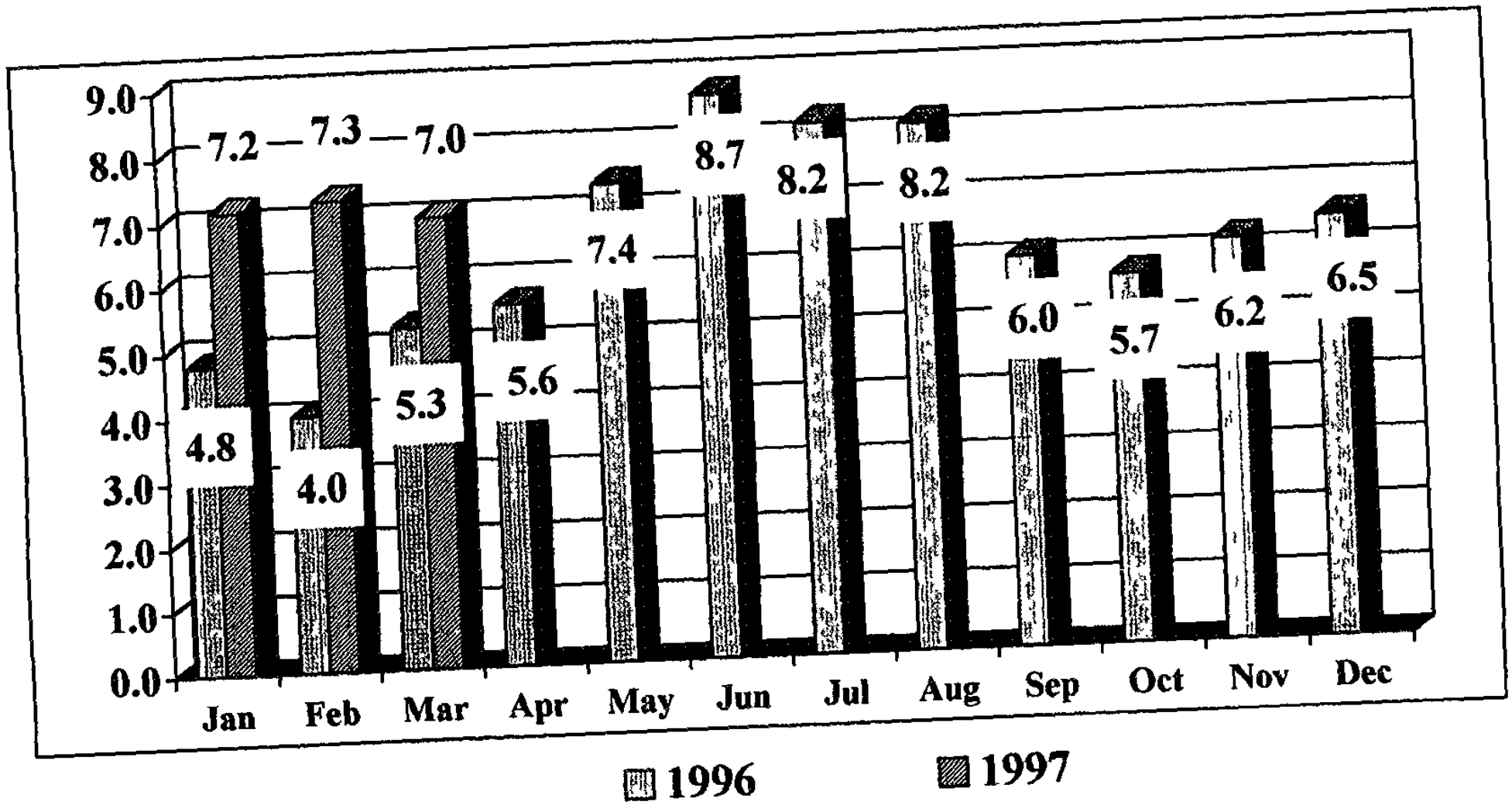
# EZ Rider
# Jackson Park
## Passengers / Hour



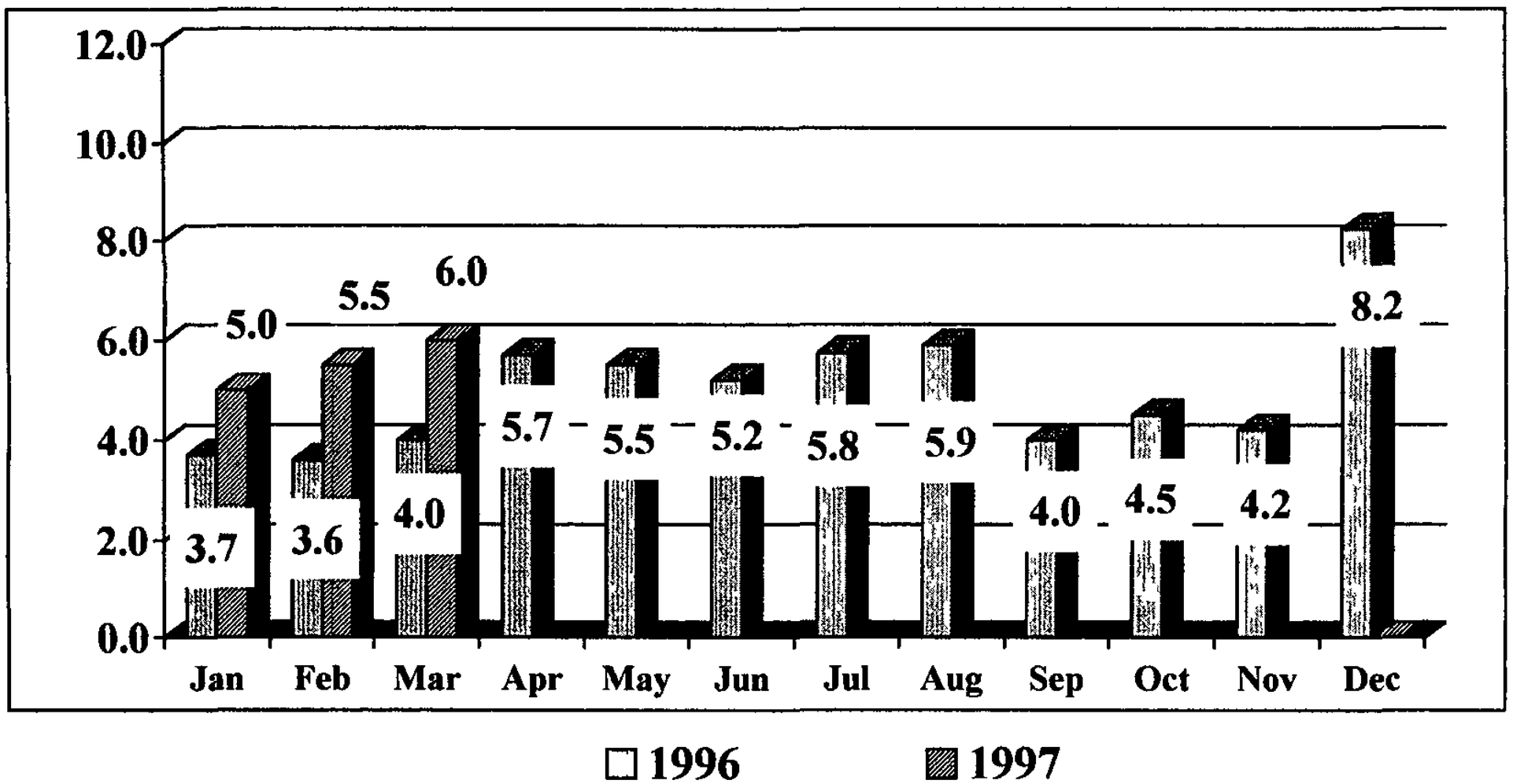
# EZ Rider
# Revolution Park
## Passengers / Hour



# EZ Rider
# Bancroft and Norris
## Passengers / Hour



# EZ Rider
# Carolinas Med.
## Passengers / Hour



# *RESULTS*

# *FROM THE*

# *E-Z RIDER SURVEY*

The survey was conducted during the month of July, 1996 One hundred four (104) persons responded to the survey The purpose of the survey was to ask riders where they wanted to go that the E-Z Rider did not already go Another reason for the survey was to obtain some demographic information and gauge usage, support and interest in the service

Completed surveys were received from both the West and North routes Sixty (60) respondents were from the North side and forty four (44) were from the West side The median age of the respondents was 33 years of age The oldest respondent was 82 years old and the youngest was 12 years old

***Question #1: How Often Do You Ride the E-Z Rider?***

- 11 percent of the survey respondents used the service once a week
- 16 percent of the survey respondents used the service twice a week
- 73 percent of the survey respondents used the service three or more times a week

***Question #2: Where do you go when you ride the E-Z Rider?***

In this and the next quote, most respondents indicated several of the options presented These percentages reflect those answers in each category

- 75% said they go shopping
- 41% said they get food stamps
- 24% said they go to recreational activities
- 53% use the E-Z Rider to go to get medical care
- 28% said they go to the bank
- 50% use it for other reasons

***Question #3: How Did You Get Around Before E-Z rider started?***

- 24% used a car
- 85% used Charlotte Transit
- 54% walked
- 13% used other means of transportation

***Question #4: Where Would You Like to Go that the E-Z Rider Does Not Already Go?***

Thirty one (31) different requests were made by the respondents Two locations were mentioned the most These locations were the Park 'N' Shop on North Tryon Street and Northpark Mall at Eastway Drive and The Plaza

There were several other locations that were noteworthy These were Social Services on Billingsley Road, Uptown, the Aquatic Center, Grier Heights neighborhood, and the Beatties Ford Road area

**Analysis and Conclusions**

Seventy three (73) percent of the respondents rode the E-Z Rider three or more times a week This shows that residents in the community are dependent on the E-Z Rider service for transportation and use it on a regular basis The fact that 75% of the respondents used E-Z Rider to get groceries shows that riders use the service to obtain necessities

Fifty three (53) percent use the E-Z Rider to get to medical care facilities This shows that the service is an important contributor to the health and well-being of the community

Forty one (41) percent use the E-Z Rider to get food stamps This is very significant because the E-Z Rider is important in making sure that children of the communities which we serve get their basic nourishment in a timely manner Although we are aware that it is the responsibility of the parents to fulfill that need, parents still need to go get the food stamps Forty percent of the respondents use the E-Z Rider for other reasons, one of which is getting to work

Eighty six percent rode Charlotte Transit exclusively before E-Z Rider started This shows that our riders are transit-dependent and don't generally have any other way of getting around

This survey confirms that people want the E-Z Rider to go to Park 'N' Shop on North Tryon Street and the Bi-Lo on Eastway Drive This survey also shows that the E-Z Rider is an important entity in the communities which it serves

The people that ride the E-Z Rider use the service regularly They take trips that are beneficial for the well-being of the community This helps the people feel a sense of community because E-Z Rider is serving its original purpose That purpose was to provide a community-based transportation service which people could depend on and use in the neighborhood Here are some examples of comments some riders made when asked about the E-Z Rider service

- "It covers all my needs "
- "I thank the Lord for E-Z Rider It's helpful to older people and children We at Mecklenburg County Parks and Recreation say thanks "
- "The drivers are very friendly "
- "I think E-Z Rider is the best thing that could have happened to the small community without cars "

These comments say best how the people feel about the E-Z Rider

**Note** This survey was conducted by the present contractor It was done as objectively as possible We do not intend to promote the E-Z Rider contractor It is our intention to show how important the E-Z Rider service is to the community

# Re-connection of Transit Corridor With Stonewall Street Bridge Construction and Related Improvements

The Department of Transportation, Engineering & Property Management, and the Planning Department have collaborated to develop a CIP project that provides for re-connection of the rail corridor paralleling South Boulevard and extending through Uptown between College and Brevard Streets This re-connection would allow the corridor to be used for transit service in the future, and for vintage trolley service in the near term The project would be implemented using a three-phase strategy, with Phase 1 expanding trolley service into Uptown, Phase 2 upgrading the trolley service south of Uptown, and Phase 3 connecting the two segments by constructing a bridge over Stonewall Street and extending the rail corridor through the space provided in the Convention Center The advantages of this strategy are

- Trolley Service is quickly expanded to serve First Ward, Uptown, and the Convention Center

- The design and construction of the Stonewall Street bridge and improvements through the Convention Center are delayed long enough to allow decisions on the potential use of the corridor for a busway, which could influence the design of those facilities

- A pedestrian/bikeway facility can be included in the upgrade of the corridor for trolley service, further supporting and encouraging private redevelopment along the corridor

- Definition and start-up of the trolley/pedestrian/bikeway use will provide the benefit of acquiring corridor amenities from the private sector as the corridor frontage is developed

The budget retreat presentation will outline the three-phase strategy, and illustrate the "building block" approach that has been utilized

The City is acquiring ownership of the corridor from Second Street to Eleventh Street from the North Carolina Railroad Corporation The City has also begun discussions with Norfolk Southern Railroad concerning the possible purchase of the corridor from south of the Convention Center to Scaleybark Road Charlotte Trolley, Inc is using the Norfolk Southern portion of the corridor for vintage trolley service between Tremont Avenue and Stonewall Street

Transportation studies are underway to determine the optimum use of the rail corridor for fixed guideway transit Options being evaluated include near-term busway and future light rail operating on the corridor, and alternative busway routes using City streets to enter Uptown Additionally, the Center City Plan Update and the First Ward Master Plan envision trolley service Uptown, eventually being connected to South End Trolley service is viewed as a catalyst for the desired mixed-use development in First Ward, Uptown, and South End

# City of Charlotte Vacancy Report

**May 6, 1997**

**Background**

For the past several years during budget workshops, City Council has asked for an analysis of vacant positions that showed the number of funded but unfilled positions In response to those requests, staff has developed a vacancy report that shows the total number of vacant and funded positions The report includes a breakdown of the vacant positions by Key Business Units (KBU) and the status of each vacancy Below are the vacancy status categories developed for that report for the upcoming year Each vacancy and the cost associated with it is placed into one of these five categories

1) Eliminated in the FY98 Budget
2) Vacant and under active recruitment
3) Vacant, but work is being performed by contract or temporary
4) Vacancy held pending competitive bid
5) Vacant and unfunded in the FY98 Budget

To develop this report, Budget and Evaluation began sharing with each KBU a monthly vacancy report showing the number of authorized, filled and vacant positions by business unit These reports were intended to help the KBU's identify position vacancies in their respective units and to deal with those vacancies in the FY98 budget development process The first of these reports (for month ending December 31, 1996) was distributed in January, 1997 to all KBU's A total of four of these monthly reports have been shared with the KBU's, the most recent showing the vacancy status of each business unit through March 25, 1997 The KBU's were asked to use the vacancy information from the March 25th report to distribute the number of vacancies in their respective units into the five categories used in the report Attached is a copy of the completed Vacancy Report for FY98 that resulted from this review process A brief summary of the report follows this background information

**Summary of Report**

Of the 355 City-wide vacancies

- 54 vacant positions (15 2% of the current vacancies) have been identified for elimination in the FY98 Budget Eliminating these positions will result in a reduction in the City's budget for Personal Services of about $883,000

- Following these reductions, the overall vacancy rate will be 6% of the current total allocated positions

- A total of 289 vacant positions (81 6% of the current vacancies) will be carried forward and funded in the FY98 Budget Funding for these positions will account for about $8 1 million of the total personal services budget

- 197 vacant positions (55 6% of the current vacancies) are outside of the General Fund, and the cost of these positions is not supported by property taxes or other general revenues

- 12 vacant positions (3 4% of the current vacancies) will be carried forward into FY98 without funding

- 216 vacant positions (60 8% of the current vacancies) are under active recruitment

- The work of 46 vacant positions (13% of the current vacancies), is currently being performed by contract or temporary employees

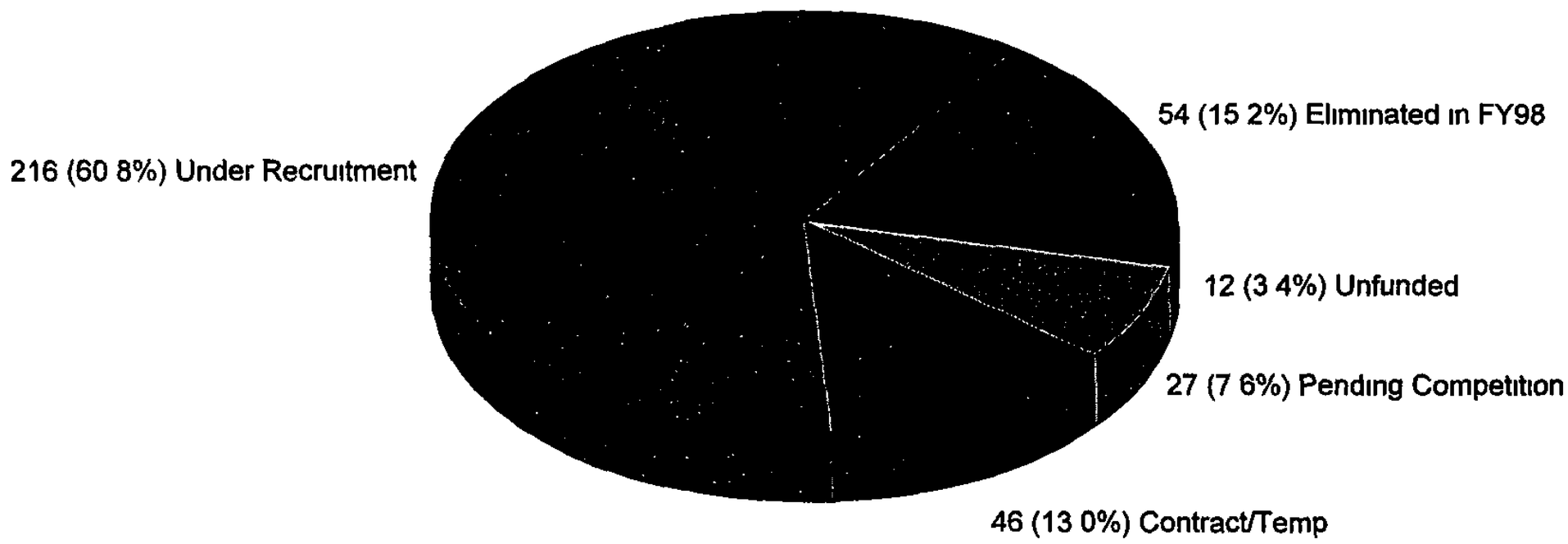
- 27 vacant positions (7 6% of the current vacancies) are being held pending the outcome of competitive bids

CITY OF CHARLOTTE
VACANCY REPORT
BY FUND
FOR FY98 BUDGET DEVELOPMENT
(Based on Payroll Ending March 25 1997)

| KEY BUSINESS | Total Allocated Positions | Total Vacant | % of KBU Positions | Eliminated In FY98 | | Under Recruitment | | Vacant by Contract/Temp | | Pending Competition | | Vacant and Unfunded |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | # | $ Value | # | $ Value | # | $ Value | # | $ Value | # |
| POLICE | | | | | | | | | | | | |
| SWORN | 1 283 00 | 3 | 0 2% | 0 | $0 | 3 | $118 252 | 0 | $0 | 0 | $0 | 0 |
| CIVILIAN | 388 50 | 34 | 8 8% | 0 | $0 | 22 | $607 205 | 6 | $190 262 | 0 | $0 | 6 |
| FIRE | | | | | | | | | | | | |
| UNIFORM | 775 00 | 7 | 0 9% | 0 | $0 | 7 | $180 845 | 0 | $0 | 0 | $0 | 0 |
| CIVILIAN | 73 00 | 5 | 6 8% | 0 | $0 | 5 | $191 202 | 0 | $0 | 0 | $0 | 0 |
| SOLID WASTE | 256 00 | 24 | 9 4% | 4 | $143 564 | 2 | $45 085 | 4 | $89 615 | 14 | $347 259 | 0 |
| TRANSPORTATION | 370 25 | 20 | 5 4% | 0 | $0 | 20 | $545 778 | 0 | $0 | 0 | $0 | 0 |
| ENG AND PROPERTY MANAGEMENT | 228 75 | 29 | 12 7% | 11 | $57 928 | 11 | $390 715 | 2 | $88 625 | 0 | $0 | 5 |
| PLANNING | 40 00 | 2 | 5 0% | 0 | $0 | 2 | $109 885 | 0 | $0 | 0 | $0 | 0 |
| MAYOR AND COUNCIL | 5 00 | 0 | 0 0% | 0 | $0 | 0 | $0 | 0 | $0 | 0 | $0 | 0 |
| CITY MANAGER | 43 00 | 1 | 2 3% | 0 | $0 | 0 | $0 | 0 | $0 | 0 | $0 | 1 |
| FINANCE | 99 00 | 8 | 8 1% | 1 | $22 586 | 5 | $178 871 | 2 | $48 190 | 0 | $0 | 0 |
| BUSINESS SUPPORT SERVICES | 168 50 | 22 | 13 1% | 3 | $133 864 | 9 | $578 304 | 5 | $272 045 | 5 | $189 120 | 0 |
| HUMAN RESOURCES | 18 50 | 1 | 5 4% | 0 | $0 | 1 | $28 095 | 0 | $0 | 0 | $0 | 0 |
| BUDGET AND EVALUATION | 11 50 | 1 | 8 7% | 0 | $0 | 1 | $67 800 | 0 | $0 | 0 | $0 | 0 |
| CITY ATTORNEY | 13 25 | 1 | 7 5% | 0 | $0 | 1 | $27 911 | 0 | $0 | 0 | $0 | 0 |
| CITY CLERK | 6 00 | 0 | 0 0% | 0 | $0 | 0 | $0 | 0 | $0 | 0 | $0 | 0 |
| **SUB TOTAL GENERAL FUND** | **3 779 25** | **158** | **4 2%** | **19** | **$357 942** | **89** | **$3 067 928** | **19** | **$688 737** | **19** | **$516,379** | **12** |
| WATER AND SEWER | 679 75 | 122 | 17 9% | 34 | $495 991 | 56 | $1 380 230 | 24 | $453 023 | 8 | $189 878 | 0 |
| AVIATION | 227 00 | 39 | 17 2% | 1 | $29 374 | 35 | $905 013 | 3 | $132 139 | 0 | $0 | 0 |
| NEIGHBORHOOD DEVELOPMENT | 110 00 | 4 | 3 6% | 0 | $0 | 4 | $129 000 | 0 | $0 | 0 | $0 | 0 |
| INSURANCE AND RISK MGT | 20 00 | 1 | 5 0% | 0 | $0 | 1 | $24 924 | 0 | $0 | 0 | $0 | 0 |
| STORM WATER | 42 00 | 5 | 11 9% | 0 | $0 | 5 | $188 179 | 0 | $0 | 0 | $0 | 0 |
| TRANSIT | 76 25 | 26 | 34 1% | 0 | $0 | 26 | $518,253 | 0 | $0 | 0 | $0 | 0 |
| **SUB TOTAL OTHER FUNDS** | **1 155 00** | **197** | **17 1%** | **35** | **$525,365** | **127** | **$3,125 599** | **27** | **$585 162** | **8** | **$189,878** | **0** |
| **TOTAL ALL FUNDS** | **4 934 25** | **355** | **7 2%** | **54** | **$883 307** | **216** | **$6 193 527** | **46** | **$1 273 899** | **27** | **$706 257** | **12** |

# City of Charlotte Vacancy Report

For Payroll Ending March 25, 1997



# Questions and Answers

**(Please place in blue Half-day Retreat Notebook behind the last page following the tab for Q's & A's.)**

# Questions and Answers

Council's questions from the previous half-day budget retreats are answered below and in the attached materials

**Q56. What are the farebox recovery rates in other cities comparable to Charlotte?**

Below is a chart which includes farebox recovery percentages and the current adult cash fare from peer cities

| City | FY95 Farebox Recovery | Current Adult Cash Fare |
|---|---|---|
| Richmond, VA | 52% | $1 25 |
| Nashville, TN | 42% | $1 35 |
| Memphis, TN | 41% | $1 10 |
| Orlando, FL | 41% | $0 85 |
| Savannah, GA | 39% | $1 25 |
| **Charlotte, NC** | **34%** | **$0.80** |
| Birmingham, AL | 27% | $1 00 |
| Jacksonville, FL | 22% | $0 60 |
| West Palm Beach, FL | 16% | $1 00 |

**Q58. Charlotte-Mecklenburg Housing Partnership: With respect to the rehabilitation of units, are there any standard costs associated with standard rehabilitation procedures? Please provide a listing of standard rehabilitation costs.**

Please see Attachment A

**Q59. Does the City of Charlotte provide shift differential pay for Police Officers? What do other cities do?**

The City of Charlotte does not currently pay a shift differential The paying of a shift premium to Police Officers is not a widespread practice in the Southeast and results in significant additional costs, including increasing the rate at which overtime must be paid for those receiving the differential In addition, the current approach affords greater flexibility in making duty assignments

During our Police/Fire Market Survey in November, 1996, we asked survey respondents whether their municipality paid additional pay for shift differential Of the 28 Southeastern cities responding to our survey, only 8 indicated that they paid a shift differential This differential was generally in the range of $ 15- 80/hr, with most paying about $ 60/hr

The practice of paying shift differentials is more common in national cities Of the 39 national cities (175,000-1 million population) responding to our survey, 22 indicated that they paid a shift differential This differential ranged from about $ 25-1 50/hr, with most paying about $ 60/hr

**Q60. How does Charlotte compare to other cities with regards to Police salaries?**

**Please see Attachments B-G.** Attached in chart form is information from the City of Charlotte Human Resources Department's annual survey of police classes in Southeastern cities of 100,000+ population and in national cities of 175,000-1 million population Data is shown for non-supervisory Police Officers, Police Sergeants and Police Captains Also shown is data on non-supervisory Police Officers comparing Charlotte to the other large North Carolina cities

In our survey for Police Officers, respondents are asked to provide their recruit level as the minimum rate, the maximum of their highest level of non-supervisory officer as the maximum, and the average actual rates of all non-supervisory officers as the average-actual Our data uses the maximum of our Senior Police Officer III level for a high school graduate for the comparison to the maximum The average-actual shown for Charlotte includes all Police Officers and Senior Police Officers as of February when our survey results were distributed The data comparison used in all cases is the median

**Q61. Please provide information on the current staff of Police Officers?**

**See Attachments H-I.**

Attachment A

# MEMORANDUM

**Date:** April 23, 1997

**To:** Mayor and Council

**From:** Stanley D. Watkins, Key Business Executive
Neighborhood Development Key Business

**Subject:** Affordable Housing Production Cost Comparison

Attached is information on affordable housing production costs requested by Councilmember Cannon and discussed at Council's March 18, 1997 Half-Day Budget Retreat The information includes the following:

- An overview of housing production and total square foot costs for the City and five City-funded nonprofit housing developers;
- A summary of various categories of costs for all partners organized by housing activity, and
- More detailed information organized by housing provider showing each project and costs associated with that project

This information was collected from the various providers and the City's own records. It covers the 12-month period from April 1996 to March 1997.

The cost comparison uses square foot costs to control for unit size, but a number of factors remain uncontrolled and may explain the variation in costs found among the City and other providers. Such factors include.

- standards of construction (these were requested of the providers and are available for review upon request);
- acquisition costs,
- number of bedrooms,
- oversight/project management capacity, and
- cost of construction financing

If you have questions or would like additional information, please contact me at 336-3796 or Lynne Jones Doblin of my staff (336-2753)

4/22/97

**Selected Affordable Housing Providers**
**Average Total Cost Per Square Foot**
**Units Completed Over the Past 12 Months**

| Housing Activity | City of Charlotte | Housing Partnership | Northwest CDC | Reid Park CDC | Grier Heights CDC | Habitat For Humanity | Total Units |
|---|---|---|---|---|---|---|---|
| **Single Family Rehabilitation** | **34.29*** | **$62 60** | **$48.14** | **$51.63** | **$39.75** | ***N A*** | |
| *Number of Units* | *14* | *34* | *5* | *2* | *1* | | *56* |
| **Single Family New Construction** | **$55.94** | ***N A*** | **$60.25** | **$61.06** | **$55.67** | **$47.31** | |
| *Number of Units* | *16* | | *1* | *4* | *4* | *31* | *56* |
| **Multifamily Rehabilitation** | ***N A*** | **18 21*** | **$31 98** | ***N A*** | ***N A*** | ***N A*** | |
| *Number of Units* | | *94* | *29* | | | | *123* |
| **Multifamily New Construction** | ***N A*** | **$70 79** | ***N A*** | ***N A*** | ***N A*** | ***N A*** | |
| *Number of Units* | | *55* | | | | | *55* |
| *Total Units* | *30* | *183* | *35* | *6* | *5* | *31* | *290* |

* Provider did not have acquisition cost associated with these projects
***N A*** - Provider did not engage in this activity over the past 12 months

**Definitions**
Single Family New Construction - Construction of a single unit on a lot
Single Family New Rehabilitation - Substantial rehabilitation of an existing unit Typically referred to as Gut Rehabilitation
Multifamily New Construction - Construction of a multifamily project
Multifamily Rehabilitation - Rehabilitation of an existing multi-family project

**Note** Except where noted total cost includes acquisition labor and material costs
**Comment*** Project cost may vary depending on construction standards number of bedrooms acquisition cost and other factors

*Prepared By Neighborhood Development Key Business Unit*

# SUMMARY OF AFFORDABLE HOUSING PROVIDERS' AVERAGE HOUSING PRODUCTION COSTS BY ACTIVITY

## Units Completed Last 12 Months

**SINGLE FAMILY REHABILITATION**

| Average | City | CMHP | Northwest Corridor CDC | Reid Park | Grier Heights | Habitat |
|---|---|---|---|---|---|---|
| Finished Size | 1,204 sq ft. | 1,323 sq ft. | 1,146 sq ft. | 1,299 sq ft. | 1,274 sq ft* | N/A |
| Acquisition Cost<br>Sq Ft. Cost | $ -0-<br>-0- | $20,015<br>$15 13 | $14,712<br>$12 83 | $21,675<br>$16 69 | $5,500<br>$4.32 | N/A |
| Rehabilitation Cost<br>Sq Ft. Cost | $23,367<br>$19 40 | $50,386<br>$38 10 | $40,175<br>$35 05 | $44,780<br>$34 47 | $45,142<br>$35 43 | N/A |
| Other Cost<br>Sq Ft. Cost | $17,932<br>$14 89 | $12,386<br>$9.37 | $300<br>$ 0.26 | $617<br>$0 48 | -0-<br>-0- | N/A |
| Total Cost<br>Sq. Ft. Cost | $41,299<br>$34.29 | $82,788<br>$62.60 | $55,187<br>$48.14 | $67,072<br>$51.64 | $50,642<br>$39.75 | N/A |
| Sales Price | N/A | $63,538 | $54,220 | $66,800 | $68,000 | N/A |

* One house only

**SINGLE FAMILY NEW CONSTRUCTION**

| Average | City | CMHP | Northwest Corridor CDC | Reid Park | Grier Heights | Habitat |
|---|---|---|---|---|---|---|
| Finished Size | 1,186 sq ft. | N/A | 1,120 sq ft.* | 1,243 sq ft. | 1,125 sq ft. | 1,060 sq ft. |
| Acquisition Cost<br>Sq Ft. Cost | $956<br>$ 0.81 | N/A | $ 5,830<br>$ 5.21 | $ 1,111<br>$0 89 | $ 4,850<br>$ 4.31 | $2,888<br>$2.72 |
| Construction Cost<br>Sq Ft. Cost | $60,255<br>$50 80 | N/A | $ 57,340<br>$51.20 | $67,862<br>$54.59 | 56,600<br>$50.30 | $33,105<br>$31.22 |
| Other Cost<br>Sq Ft. Cost | $ 5,142<br>$ 4.33 | N/A | $4,301<br>$ 3 84 | $6,944<br>$ 5 58 | $ 1,198<br>$ 1 06 | $14,176<br>$13.37 |
| Total Cost<br>Sq. Ft. Cost | $66,354<br>$55.94 | N/A | $67,474<br>$60.25 | $75,917<br>$61.06 | $62,648<br>$55.67 | $50,168<br>$47.31 |
| Sales Price | $64,650 | N/A | $69,478 | $76,076 | $65,022 | $47,826 |

* One house only

| MULTIFAMILY REHABILITATION | | | | | | |
|---|---|---|---|---|---|---|
| Average | City | CMHP | Northwest Corridor CDC | Reid Park | Grier Heights | Habitat |
| Finished Size | N/A | 977 sq ft. | 709 sq ft. | N/A | N/A | N/A |
| Acquisition Cost<br>Sq Ft. Cost | N/A | -0-<br>-0- | $15,053<br>$21.24 | N/A | N/A | N/A |
| Rehabilitation Cost<br>Sq Ft. Cost | N/A | $10,684<br>$10.94 | $4,655<br>$6.57 | N/A | N/A | N/A |
| Other Cost<br>Sq Ft. Cost | N/A | $7,100<br>$7.27 | $2,952<br>$4 17 | N/A | N/A | N/A |
| Total Cost<br>Sq. Ft. Cost | N/A | $17,784<br>$18.21 | $22,660<br>$31 98 | N/A | N/A | N/A |
| Sales Price | N/A | N/A | N/A | N/A | N/A | N/A |

| MULTI FAMILY NEW CONSTRUCTION | | | | | | |
|---|---|---|---|---|---|---|
| Averaged | City | CMHP | Northwest Corridor CDC | Reid Park | Grier Heights | Habitat |
| Finished Size | N/A | 1,028 sq ft. | N/A | N/A | N/A | N/A |
| Acquisition Cost<br>Sq. Ft. Cost | N/A | $2,182<br>$2 12 | N/A | N/A | N/A | N/A |
| Construction Cost<br>Sq Ft. Cost | N/A | $56,938<br>$55 41 | N/A | N/A | N/A | N/A |
| Other Cost<br>Sq. Ft. Cost | N/A | $13,627<br>$13.26 | N/A | N/A | N/A | N/A |
| Total Cost<br>Sq. Ft. Cost | N/A | $72,747<br>$70 79 | N/A | N/A | N/A | N/A |
| Sales Price | N/A | N/A | N/A | N/A | N/A | N/A |

## CITY OF CHARLOTTE NEIGHBORHOOD DEVELOPMENT KEY BUSINESS

### CHART 1

### SINGLE FAMILY SELECTIVE REHABILITATION COSTS

| | Address | Finished Size | Acquisition Cost | Rehabilitation Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
|---|---|---|---|---|---|---|---|---|
| 1 | 247 W Kingston Ave | 1611 | 0 | $48 634 | 0 | $48,634 | N/A | N/A |
| 2 | 1513 Parkwood Ave | 1254 | 0 | 21 528 | 1,676 | 23 204 | N/A | N/A |
| 3 | 1805 Merriman Ave | 900 | 0 | 28,070 | 37,506 | 65,576 | N/A | N/A |
| 4 | 2005 Thomas Ave | 934 | 0 | 14,124 | 28,154 | 42,278 | N/A | N/A |
| 5 | 3609 Jonquil St | 1326 | -0 | 27,639 | 2,184 | 29,823 | N/A | N/A |
| 6 | 1408 Parkwood Ave | 1632 | -0- | 6 222 | 721 | 6,943 | N/A | N/A |
| 7 | 1737 Wilmore Dr | 1492 | 0 | 28,532 | 26,003 | 54,535 | N/A | N/A |
| 8 | 1215 Seigle Ave | 1276 | 0 | 21 087 | 21 710 | 42,797 | N/A | N/A |
| 9 | 3315 Ross Ave | 540 | 0 | 15,659 | 1,160 | 16 819 | N/A | N/A |
| 10 | 3323 Tyron Dr | 1729 | 0 | 23 250 | 75,964 | 99,214 | N/A | N/A |
| 11 | 814 Woodside Ave | 916 | 0 | 29,200 | 4,823 | 34,023 | N/A | N/A |
| 12 | 4413 Collingwood Dr | 1142 | 0 | 10,685 | 19,315 | 30 000 | N/A | N/A |
| 13 | 3509 Ellington St | 833 | 0 | 34,753 | 2,588 | 37,341 | N/A | N/A |
| 14 | 1401 Kennon St | 1276 | 0 | 17,750 | 29,250 | 47,000 | N/A | N/A |
| | **TOTAL** | **16,861** | **0** | **$327,133** | **$251,054** | **$578,187** | | |
| | **AVERAGE** | **1204** | **0** | **$23,367** | **$17,932** | **$41,299** | | |
| | **Cost/Square Foot** | | | **$19 40** | **$14 89** | **$34 29** | | |

NOTE Other costs include contingency, closing costs and may include refinancing of existing debt

## CITY OF CHARLOTTE NEIGHBORHOOD DEVELOPMENT KEY BUSINESS

### CHART 2

### SINGLE FAMILY NEW CONSTRUCTION COSTS

| | Address | Finished Size | Acquisition Cost | New Construction Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
|---|---|---|---|---|---|---|---|---|
| 1 | 3213 Lasalle Street | 1192 | $ -0- | $ 59 312 | $ 4,650 | $ 63,962 | N/A | N/A |
| 2 | 6815 Rockwell Boulevard | 1192 | -0 | 59,312 | 8,895 | 68,207 | N/A | N/A |
| 3 | 6028 Carver Boulevard | 1192 | -0- | 59,312 | 5,850 | 65,162 | N/A | N/A |
| 4 | 6204 Carver Boulevard | 1192 | 0 | 59,312 | 8,895 | 68,207 | N/A | N/A |
| 5 | 5809 Greene Street | 1192 | 0 | 59,312 | 4,650 | 63,962 | N/A | N/A |
| 6 | 5625 Patton Street | 1192 | 0 | 59,312 | 8,895 | 68,207 | N/A | N/A |
| 7 | 3127 Ridge Avenue | 1080 | 0 | 62 500 | 6,404 | 68,904 | N/A | N/A |
| 8 | 1513 N Harrill Street | 1628 | 0 | 73 000 | 10,500 | 83,500 | N/A | N/A |
| 9 | 227 S Lander Street | 1219 | 0 | 60 377 | 5,000 | 65 377 | N/A | N/A |
| 10 | 2308 Booker Avenue | 1219 | 0 | 66,101 | 2,090 | 68,191 | N/A | N/A |
| 11 | 1833 Pegram Street | 1192 | -0- | 59,312 | 4,650 | 63,962 | N/A | N/A |
| 12 | 2741 Mayfair Ave | 1092 | 0 | 58 825 | 3,850 | 62,675 | N/A | N/A |
| 13 | 2656 Old Steele Creek Road* | 936 | 6,000 | 56,500 | 2,100 | 64,600 | 63 900 | (300) |
| 14 | 2660 Old Steele Creek Road* | 1292 | 3,000 | 57 200 | 1,947 | 62,147 | 64,900 | 2,753 |
| 15 | 2821 Mayfair Avenue* | 1090 | 3,300 | 57 200 | 1,947 | 62,447 | 64,900 | 2,453 |
| 16 | 2749 Mayfair Avenue* | 1080 | 3,000 | 57 200 | 1 947 | 62,147 | 64,900 | 2,753 |
| | TOTAL | 18,980 | $15,300 | $964,087 | $82,270 | $1,061,657 | | |
| | AVERAGE | 1186 | 81 | $60,255 | $5,142 | $66,354 | | |
| | Cost/Square Foot | | $0 81 | $50 80 | $4 33 | $55 94 | | |

NOTE *Wingate contracted prices Other costs for houses 1 13 include demolition, water/sewer tap-on fee and $1 000 closing costs

## CHARLOTTE MECKLENBURG HOUSING PARTNERSHIP

## CHART 1

## SINGLE FAMILY REHABILITATION

| | ADDRESS | FINISHED SIZE | ACQUISITION COST | REHABILITATION COST | OTHER COST | TOTAL COST | SALE PRICE | GAIN/LOSS |
|---|---|---|---|---|---|---|---|---|
| | GENESIS PARK | | | | | | | |
| 1 | 1921 Brewton Drive | 1,573 | $10 150 | $60 729 | $9 321 | $80 200 | $66,505 | $(13,695) |
| 2 | 2001 Brewton Drive | 1,154 | 18,750 | 57,923 | 6,034 | 82,707 | 55,300 | $(27,407) |
| 3 | 2012 Brewton Drive | 1 573 | 18 750 | 61,601 | 5,976 | 86,327 | 67,588 | $(18 739) |
| 4 | 2016 Brewton Drive | 1,573 | 18,750 | 61,981 | 11,113 | 91 844 | 68,092 | $(23,752) |
| 5 | 2020 Brewton Drive | 1 373 | 18 750 | 62 471 | 16,508 | 97,729 | 66 000 | $(31 729) |
| 6 | 2021 Brewton Drive | 1,449 | 18 750 | 59 776 | 14 067 | 92 593 | 61,400 | $(31 193) |
| 7 | 2105 Brewton Drive | 1 390 | 18,750 | 53,855 | 7,168 | 79 773 | 65,600 | $(14 173) |
| 8 | 2120 Genesis Park Place | 1,600 | 23 931 | 59 035 | 8 630 | 91 596 | 68,100 | $(23,496) |
| 9 | 1713 Rush Wind Drive* | 1,383 | 24 811 | 51 560 | 17,284 | 93,655 | 62,800 | (30,855) |
| 10 | 1805 Rush Wind Drive | 1,439 | 18,750 | 42 848 | 21,979 | 83 577 | 72,330 | (11,247) |
| 11 | 1808 Rush Wind Drive | 1,536 | 21,322 | 42 372 | 10,332 | 74,026 | 68,100 | (5 926) |
| 12 | 1809 Rush Wind Drive | 1,250 | 18 750 | 38,382 | 10,413 | 67,545 | 67,000 | (545) |
| 13 | 1812 Rush Wind Drive* | 1,232 | 17,127 | 46 437 | 12,694 | 76 258 | 63,925 | (12,333) |
| 14 | 1816 Rush Wind Drive | 1 160 | 18 750 | 43 292 | 16,265 | 78,307 | 60,000 | (18 307) |
| 15 | 1817 Rush Wind Drive | 1,450 | 22,096 | 52 482 | 15 435 | 90 013 | 63 855 | (26,158) |
| 16 | 1820 Rush Wind Drive | 1,160 | 19 456 | 48 919 | 8,367 | 76 742 | 65 444 | (11 298) |
| 17 | 1821 Rush Wind Drive | 1,450 | 22,150 | 48 442 | 12,133 | 82,725 | 63,800 | (18 925) |
| 18 | 1824 Rush Wind Drive* | 1,160 | 13,701 | 37,792 | 11,468 | 62,961 | 60 425 | (2,536) |
| 19 | 1900 Rush Wind Drive* | 1,160 | 22,920 | 39,458 | 10,984 | 73,362 | 62,100 | (11,262) |
| 20 | 1901 Rush Wind Drive* | 1,450 | 28,400 | 55,222 | 13,518 | 97,140 | 63,600 | (33,540) |
| 21 | 1912 Rush Wind Drive | 1,600 | 8 057 | 55 533 | 15 059 | 78 649 | 68 398 | (10 251) |

## CHARLOTTE MECKLENBURG HOUSING PARTNERSHIP

### CHART 1

### SINGLE FAMILY REHABILITATION

| | ADDRESS | FINISHED SIZE | ACQUISITION COST | REHABILITATION COST | OTHER COST | TOTAL COST | SALE PRICE | GAIN/LOSS |
|---|---|---|---|---|---|---|---|---|
| 22 | 2000 Rush Wind Drive | 1 512 | 18,750 | 53 901 | 10 791 | 83 442 | 65,000 | (18,442) |
| 23 | 2004 Rush Wind Drive | 1 474 | 15,869 | 44 892 | 10,811 | 71,572 | 67,400 | (4,172) |
| 24 | 2109 Rush Wind Drive | 1,242 | 17 568 | 54 316 | 17 672 | 89,556 | 70 400 | (19,156) |
| 25 | 2121 Rush Wind Drive | 1,244 | 18,209 | 54 541 | 11,137 | 83,887 | 62 000 | (21,887) |
| 26 | 2200 Rush Wind Drive | 1,244 | 24,217 | 48,511 | 8,971 | 81 699 | 62,400 | (19,299) |
| 27 | 2204 Rush Wind Drive | 1,320 | 21,322 | 45,589 | 13,279 | 80,190 | 65,857 | (14 333) |
| 28 | 2209 Rush Wind Drive | 1,337 | 28,238 | 49,099 | 8,464 | 85,801 | 68,362 | (17,439) |
| | **SCATTERED SITES** | | | | | | | |
| 29 | 2829 Ataberry Drive | 1,168 | 38 420 | 49,594 | 12,719 | 100,733 | 60,000 | (40,733) |
| 30 | 8404 Pence Road | 1 140 | 29,549 | 27,527 | 17,679 | 74 755 | 60,400 | (14,355) |
| | **SEVERSVILLE** | | | | | | | |
| 31 | 423 Katonah Avenue | 1,043 | 17,017 | 51,378 | 12,341 | 80,736 | 54,200 | (26,536) |
| 32 | 512 Katonah Avenue | 1,043 | 17,017 | 49,252 | 13,726 | 79,995 | 55,500 | (24,495) |
| 33 | 528 Katonah Avenue | 1,043 | 17,017 | 51,899 | 13,737 | 82,653 | 54,200 | (28,453) |

## CHARLOTTE MECKLENBURG HOUSING PARTNERSHIP

### CHART 1

### SINGLE FAMILY REHABILITATION

| | ADDRESS | FINISHED SIZE | ACQUISITION COST | REHABILITATION COST | OTHER COST | TOTAL COST | SALE PRICE | GAIN/LOSS |
|---|---|---|---|---|---|---|---|---|
| 34 | 422 S Bruns Avenue | 1 043 | 14 447 | 52 528 | 15 060 | 82 035 | 54,200 | (27 835) |
| | TOTAL | 44,968 | $680 511 | $1 713 137 | $421 135 | $2 814 783 | $2 160 281 | $(654 502 ) |
| | AVERAGE | 1 323 | $20 015 | $50 386 | $12,386 | $82 788 | $63,538 | $(19,250) |
| | COST/SQUARE FOOT | | 15 13 | 38 10 | 9 37 | 62 60 | 48 04 | |

**NOTES**

All houses have been substantially rehabilitated All houses were gutted to useable structural members and all new interiors finises building systems doors windows, cabinets finishes etc were installed to provide a product with life expectancy comparable to the 30 year mortgage

- Addresses with asterisks include Fannie Mae contributions of $30,000 used toward the cost of rehabilitation
- All houses sold in targeted neighborhoods are provided with an appliance package including, stove refrigerator, range and hood, dishwasher, washer and dryer The buyer has he option of including (at cost to the buyer) fences, alarm systems etc
- The range of renovation costs can be attributed to variances in conditions of useable structures, amount of additional materials or work required to prepare the site and variables in plans and features
- Other costs include, inventory costs (taxes, insurance, maintenance), development costs (legal fees, planning), community upkeep (cleaning of surrounding areas) program delivery costs (site supervision project support costs) appliances and options warranty charges and miscellaneous

## CHARLOTTE MECKLENBURG HOUSING PARTNERSHIP

### CHART 2

### MULTIFAMILY REHABILITATION

| Address | Number of Units | Square Footage | Acquisition | Rehabilitation Costs | Other | Total Costs | Total Cost/Unit |
|---|---|---|---|---|---|---|---|
| Pleasantview Apartments | 45 | 45,694 | $0 | $472 500 | $359,143 | $831,643 | $18,481 |
| Brighton Place Apartments | 49 | 46 110 | $0 | $531,772 | $308,286 | $840,058 | $17,144 |
| **TOTAL** | 94 | 91,804 | $0 | $1,004,272 | $667,429 | $1,671,701 | $17,784 |
| **AVERAGE** | 1 | 977 | $0 | $10,684 | $7,100 | $17,784 | |
| **COSTS/SQUARE FOOT** | | | | $10 94 | $7 27 | $18 21 | |

**Notes:**

- The complexes shown above were two of the four apartment communities transferred from CHA to CMHP and were known as the, "CFU's "
- Funding for rehabilitation was a combination of grant funds from the City of Charlotte and a bank loan from NationsBank
- Renovation of these complexes included the following

a The addition of a community space with a management office, Pathway office, laundry room and community meeting space
b The apartments were upgraded with the addition of central air conditioning, dryer hook ups, carpeting, all new appliances (range, hoods, refrigerators, dishwashers)
c Required repairs and renovations were based on repair lists developed for each unit/building
d The sites were completely landscaped and new site and building lighting installed

| CHARLOTTE MECKLENBURG HOUSING PARTNERSHIP | | | | | | | |
|---|---|---|---|---|---|---|---|
| CHART 3 | | | | | | | |
| MULTIFAMILY NEW CONSTRUCTION | | | | | | | |
| Address | Number of Units | Square Footage | Acquisition | Construction Costs | Other | Total Costs | Total Cost/Unit |
| Cheshire Chase Apartments | 55 | 56,521 | $120,000 | $3,131,585 | $749,494 | $4,001,079 | $72,747 |
| TOTAL | 55 | 56,521 | $120,000 | $3,131,585 | $749,494 | $4,001,079 | $72,747 |
| AVERAGE | 1 | 1,028 | $2,182 | $56,938 | $13,627 | $72,747 | |
| COSTS/SQUARE FOOT | | | $2 12 | $55 41 | $13 26 | $70 79 | |
| AVERAGE SIZE COST | | | | $56,938 | $13,627 | $72,747 | |
| | | | | | | | |

**Notes:**

- Chesire Place is a new apartment community that was funded through a combination of loan, tax credit financing and City finds
- The community space includes a management office, PATHWAYS office, laundry room and community meeting space
- Construction costs include cost of lease-up, cost of appliances (ranges, hoods, refrigerators, dishwashers)

| NORTHWEST CORRIDOR CDC | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| CHART 1 | | | | | | | | |
| SINGLE FAMILY REHABILITATION COSTS | | | | | | | | |
| | Address | Finished Size | Acquisition Cost | Rehabilitation Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
| 1 | 113 N Smallwood Place | 962 | 9,010 | 37,203 | -0- | 46,213 | 38,500 | $(7,713) |
| 2 | 2433 Dundeen Street | 869 | 10,600 | 36,000 | -0- | 46,600 | 41,700 | (4,900) |
| 3 | 2316 Dundeen Street | 1101 | 7,950 | 33,981 | 1,500 | 43,431 | 45,900 | 2,469 |
| 4 | 2623/25 Dundeen Street | 1400 | 23,000 | 46,149 | -0- | 69,149 | 72,500 | 3,351 |
| 5 | 2604/06 Dundeen Street | 1400 | 23,000 | 47,544 | -0- | 70,544 | 72,500 | 1,956 |
| | | | | | | | | |
| | **TOTAL** | **5732** | **$73,560** | **$200,877** | **$1,500** | **$275,937** | **$271,100** | **$(4,837)** |
| | **Average** | **1146** | **$14,712** | **$40,175** | **$300** | **$55,187** | **$54,220** | |
| | **Cost/Square Foot** | | **$12.83** | **$35 05** | **26** | **$48 14** | **$47 30** | |

| CHART 2 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| SINGLE FAMILY NEW CONSTRUCTION COSTS | | | | | | | | |
| | Address | Finished Size | Acquisition Cost | New Construction Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
| 1 | 2221 Booker Avenue | 1120 | $5,830 | $57,340 | $4,301 | $67,474 | $69,478 | 2,004 |
| | **TOTAL** | **1120** | **$5,830** | **$57,340** | **$4,301** | **$67,474** | **$69,478** | **2,004** |
| | **AVERAGE** | **1120** | **$5,830** | **$57,340** | **$4,301** | **$67,474** | **$69,478** | |
| | **Cost/Square Foot** | | **$5.21** | **$51.20** | **$3.84** | **$60.25** | **$62.03** | |

| CHART 3 | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| MULTIFAMILY REHABILITATION (RENTAL) | | | | | | | | | |
| | Address | Number of Units | Finished Size | Acquisition Cost | Rehabilitation Cost | Other Cost | Total Cost | Sales Price | Un-recovered costs |
| 1 | 2320 Dundeen St | 2 | 1400 | $21,200 | $36,377 | $4,173 | $61,750 | N/A | $4,173 |
| 2 | Dundeen Court | 27 | 19,150 | $415,350 | $98,603 | $81,436 | $595,390 | N/A | -0- |
| | **TOTAL** | **29** | **20,550** | **$436,550** | **$134,980** | **$85,609** | **$657,140** | **N/A** | **$4,173** |
| | **AVERAGE** | | 709 | **$15,053** | **$4,655** | **$2,952** | **$22,660** | | |
| | **Cost/Square Foot** | | | **$21.24** | **$6 57** | **$4.17** | **$31.98** | | **N/A** |

## REID PARK CDC

### CHART 1

### SINGLE FAMILY REHABILITATION COSTS

| | Address | Finished Size | Acquisition Cost | Rehabilitation Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
|---|---|---|---|---|---|---|---|---|
| 1 | 3124 Reid Avenue | 1299 | $21,675 | 44,780 | $724 | $ 67,179 | $ 72,000 | $4,821 |
| 2 | 3128 Reid Avenue | 1299 | 21,675 | 44,780 | 510 | 66,965 | 61,600 | (5,365) |
| | **TOTAL** | **2598** | **$43,350** | **$89,560** | **$1,234** | **$134,144** | **$133,600** | **(544)** |
| | **AVERAGE** | **1299** | **$21,675** | **$44,780** | **$617** | **$67,072** | **$66,800** | |
| | **Cost/Square Foot** | | **$16.69** | **$34 47** | **.48** | **$ 51.64** | **$51.42** | |

### CHART 2

### SINGLE FAMILY NEW CONSTRUCTION COSTS

| | Address | Finished Size | Acquisition Cost | New Construction Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
|---|---|---|---|---|---|---|---|---|
| 1 | 2916 Amay James Avene | 1295 | Grant | $70,137 | $5,867 | $76,003 | $ 72,000 | $(4003) |
| 2 | 3148 Amay James Avenue | 1330 | $ 2,222 | 66,704 | 11,100 | 80,026 | 84,450 | 4,424 |
| 3 | 3154 Amay James Avenue | 1,268 | 2,222 | 66,704 | 10,807 | 79,733 | 79,950 | 217 |
| 4 | 3127 Ridge Avenue | 1080 | Replacement | 67,904 | -0- | $67,904 | 67,902 | 2 |
| | **TOTAL** | **4,973** | **$4,444** | **$271,449** | **$27,774** | **$303,666** | **$304,302** | **$640** |
| | **AVERAGE** | **1243** | **$1,111** | **$67,862** | **$6,944** | **$75,917** | **$76,076** | |
| | **Cost/Square Foot** | | **.89** | **$54.59** | **$5.58** | **$61.06** | **$61.19** | |

| GRIER HEIGHTS ECONOMIC FOUNDATION (GHEF) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| CHART 1 | | | | | | | | |
| SINGLE FAMILY REHABILITATION COSTS | | | | | | | | |
| | Address | Finished Size | Acquisition Cost | New Construction Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
| 1 | 3117 Drennan Street | 1274 | $ 5,500 | $ 45,142 | -0- | $ 50,642 | $ 68,000 | $17,358 |
| | **TOTAL** | **1274** | **$5,500** | **$45,142** | **-0-** | **$50,642** | **$68,000** | **$17,358** |
| | **AVERAGE** | **1274** | **$5,500** | **$45,142** | **-0-** | **$50,642** | **$68,000** | **$17,358** |
| | **Cost/Square Foot** | | **$4.32** | **$35.43** | | **$39.75** | **$53.38** | |

| GRIER HEIGHTS ECONOMIC FOUNDATION (GHEF) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| CHART 2 | | | | | | | | |
| SINGLE FAMILY NEW CONSTRUCTION COSTS | | | | | | | | |
| | Address | Finished Size | Acquisition Cost | New Construction Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
| 1 | 2801 Marney Avenue | 1135 | $ 4,700 | $ 57,900 | $1,192 | $ 63,792 | $ 66,230 | $2,438 |
| 2 | 2809 Marney Avenue | 1122 | 4,700 | 55,300 | 1,200 | 61,200 | 63,500 | 2,300 |
| 3 | 416 Alpha Street | 1122 | 5,300 | 57,900 | 1,200 | 64,400 | 66,860 | 2,460 |
| 4 | 420 Alpha Street | 1122 | 4,700 | 55,300 | 1,200 | 61,200 | 63,500 | 2,300 |
| | **TOTAL** | **4501** | **$19,400** | **$226,400** | **$4,792** | **$250,592** | **$260,090** | **$9,498** |
| | **AVERAGE** | **1125** | **$4,850** | **$56,600** | **$1,198** | **$62,648** | **$65,022** | |
| | **Cost/Square Foot** | | **$ 4.31** | **$50.30** | **$ 1.06** | **$55.67** | **$57.79** | |

## HABITAT FOR HUMANITY

### CHART 1

### SINGLE FAMILY NEW CONSTRUCTION COSTS

| | Address | Finished Size | Acquisition Cost | Construction Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
|---|---|---|---|---|---|---|---|---|
| 1 | 1521 Sumter Street | 1024 | $ 5,289 | $ 33,092 | $14,176 | $ 52,557 | $ 47,400 | $ (5,157) |
| 2 | 1910 Double Oaks | 1024 | 3,763 | 31,411 | 14,176 | 49,350 | 47,400 | (1,950) |
| 3 | 1240 Louise Avenue | 1038 | 157 | 30,852 | 14,176 | 45,185 | 47,400 | 2,215 |
| 4 | 1726 Umstead Street | 1231 | 2,909 | 38,017 | 14,176 | 55,102 | 49,600 | (5,502) |
| 5 | 428 Jones Street | 1205 | 2,932 | 32,813 | 14,176 | 49,921 | 49,600 | (321) |
| 6 | 336 Jones Street | 1205 | 2,500 | 37,014 | 14,176 | 53,690 | 49,600 | (4,090) |
| 7 | 1612 Parson Street | 1038 | 2,674 | 34,090 | 14,176 | 50,940 | 47,400 | (3,540) |
| 8 | 332 Jones | 1038 | 2,714 | 33,509 | 14,176 | 50,399 | 47,400 | (2,999) |
| 9 | 1228 Siegel Avenue | 1038 | 3,210 | 33,993 | 14,176 | 51,379 | 47,400 | (3,979) |
| 10 | 1737 Hawthorne | 1038 | 2,665 | 35,376 | 14,176 | 52,217 | 47,400 | (4,817) |
| 11 | 1508 Caldwell Street | 1038 | 2,945 | 29,091 | 14,176 | 46,212 | 47,400 | 1,188 |
| 12 | 425 Jones Street | 1038 | 3,008 | 33,026 | 14,176 | 50,210 | 47,400 | (2,810) |
| 13 | 1001 Allen Street | 1031 | 1,523 | 32,751 | 14,176 | 48,450 | 47,400 | (1,050) |
| 14 | 1012 Harrill Street | 1031 | 3,190 | 29,158 | 14,176 | 46,524 | 47,400 | 876 |
| 15 | 1005 Allen Street | 1205 | 1,523 | 31,338 | 14,176 | 47,037 | 49,600 | 2,563 |
| 16 | 1516 McDowell Street | 1038 | 2,045 | 37,147 | 14,176 | 53,368 | 47,400 | (5,968) |
| 17 | 1615 Davidson Street | 1038 | 13,175 | 30,753 | 14,176 | 58,104 | 47,400 | (10,704) |
| 18 | 2212 Jennings Street | 1024 | 102 | 36,391 | 14,176 | 50,669 | 47,400 | ( 3,269) |
| 19 | 2216 Jennings Street | 1024 | 102 | 35,174 | 14,176 | 49,452 | 49,600 | 148 |
| 20 | 2220 Jennings Street | 1031 | 102 | 35,824 | 14,176 | 50,102 | 47,400 | (2,702) |

| | Address | Finished Size | Acquisition Cost | Construction Cost | Other Cost | Total Cost | Sales Price | Gain/Loss |
|---|---|---|---|---|---|---|---|---|
| 21 | 727 17th Street | 1031 | 2,697 | 32,315 | 14,176 | 49,188 | 47,400 | (1,788) |
| 22 | 1933 Allen Street | 1031 | 2,839 | 35,626 | 14,176 | 52,641 | 47,400 | (5,241) |
| 23 | 1925 Allen Street | 1031 | 2,839 | 35,254 | 14,176 | 52,269 | 47,400 | (4,869) |
| 24 | 1108 Belmont Avenue | 1024 | 8,746 | 31,191 | 14,176 | 54,113 | 47,400 | (6,713) |
| 25 | 325 Nelson Avenue | 1031 | 1,900 | 30,996 | 14,176 | 47,072 | 47,400 | 328 |
| 26 | 329 Nelson Avenue | 1031 | 1,900 | 31,836 | 14,176 | 47,912 | 47,400 | (512) |
| 27 | 315 Nelson Avenue | 1024 | 98 | 29,720 | 14,176 | 43,994 | 47,400 | 3,406 |
| 28 | 313 Nelson Avenue | 1024 | 98 | 31,573 | 14,176 | 45,847 | 47,400 | 1,553 |
| 29 | 309 Lander Street | 1024 | 750 | 35,929 | 14,176 | 50,855 | 47,400 | (3,455) |
| 30 | 1104 Belmont Avenue | 1205 | 4,119 | 30,867 | 14,176 | 49,162 | 49,600 | 438 |
| 31 | 1236 Louise Avenue | 1038 | 7,005 | 30,114 | 14,176 | 51,295 | 47,400 | (3,895) |
| | | | | | | | | |
| | TOTAL | 32,871 | $89,519 | $1,026,241 | $439,456 | $1,555,216 | $1,482,600 | $(72,616) |
| | AVERAGE | 1,060 | $ 2,888 | $33,105 | $14,176 | $ 50,168 | $ 47,826 | |
| | COST/SQUARE FOOT | | $ 2 72 | $31 22 | $13 37 | $47 31 | $45 10 | |

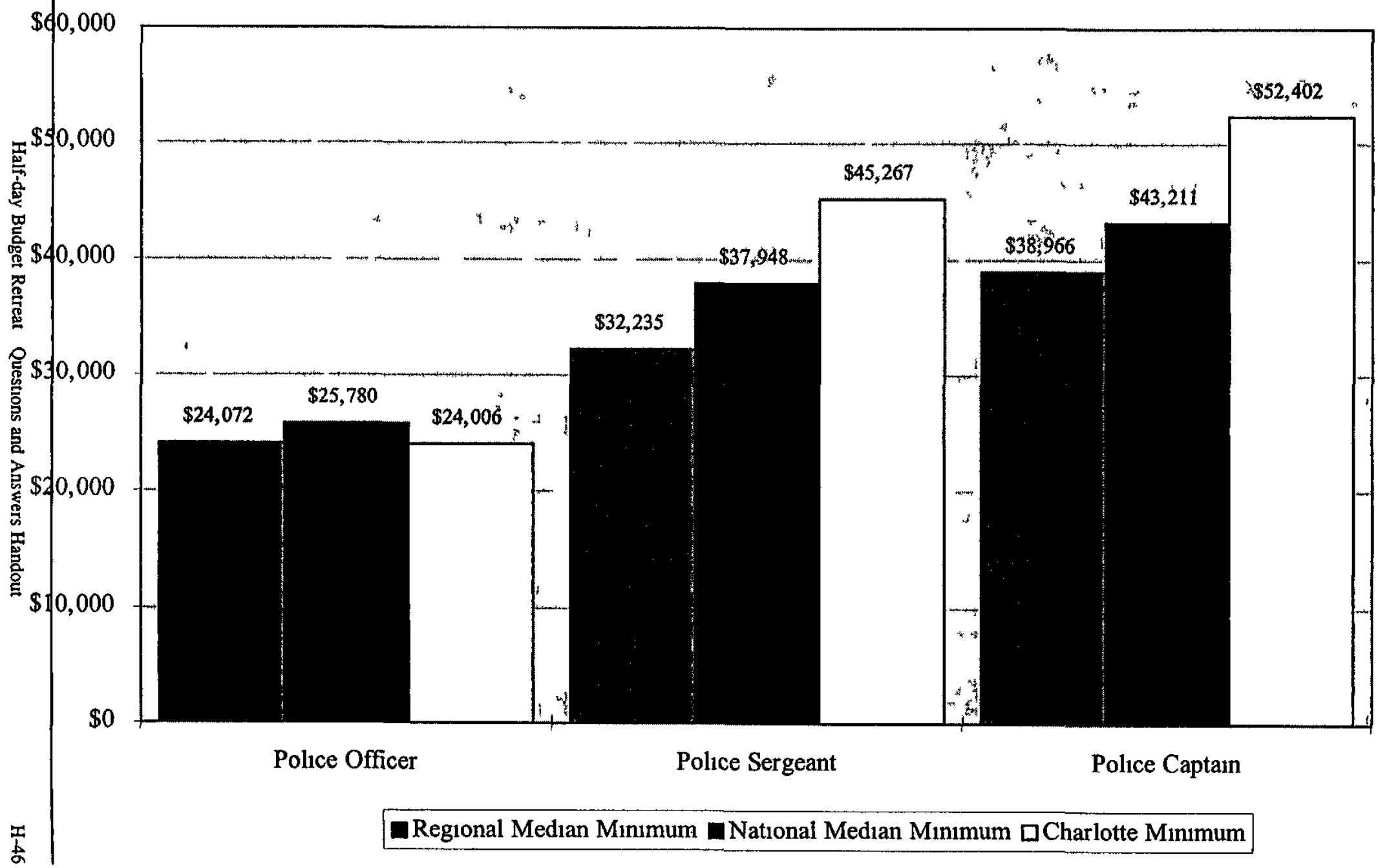
NOTE "Other Costs" includes all costs except loan repayments, tithe to H/H International and fundraising budget

# Comparison of Regional and National Police Data to Charlotte

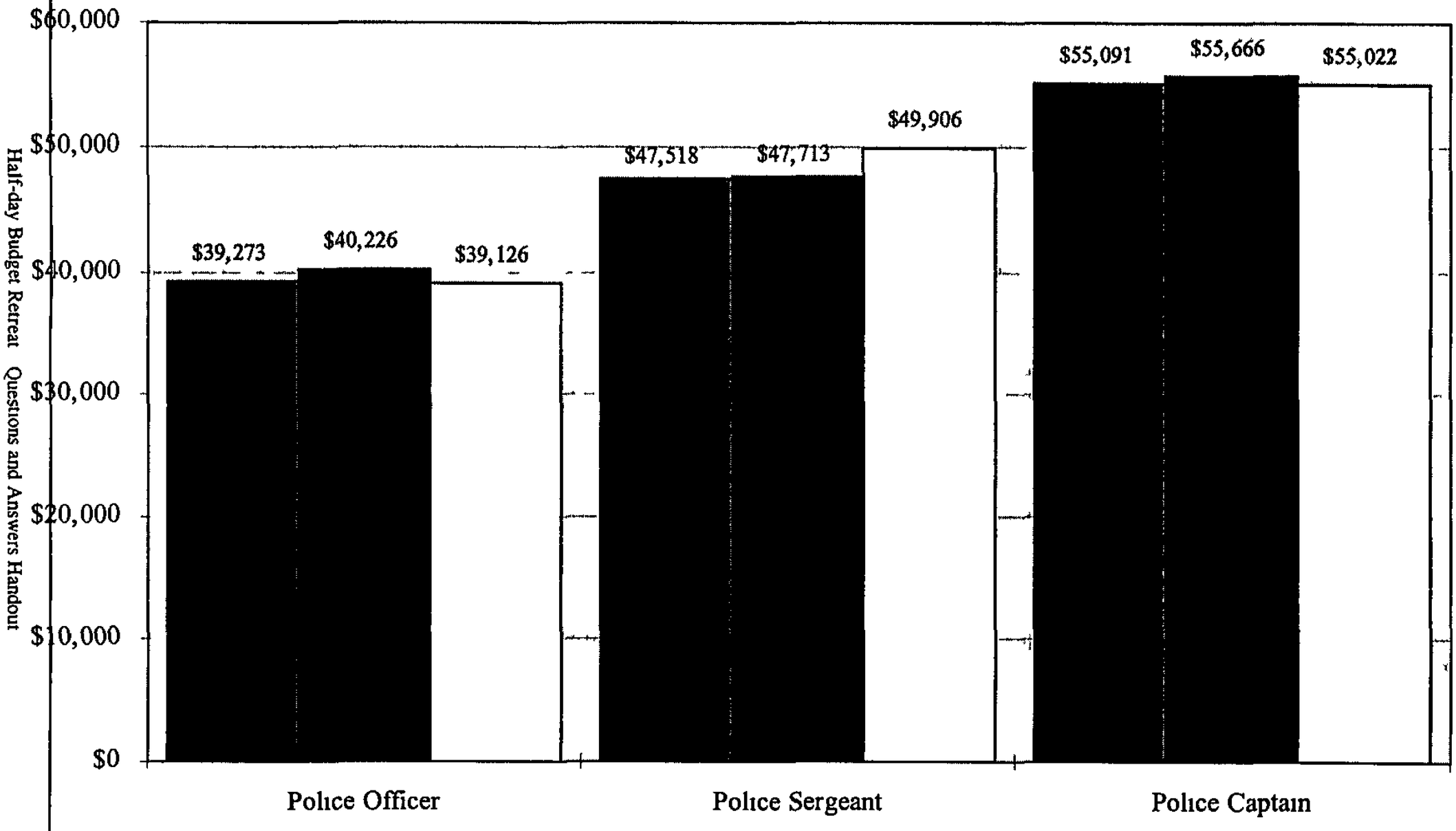
| | Regional Median Minimum | National Median Minimum | Regional Median Maximum | National Median Maximum | Regional Median Avg/Actual | National Median Avg/Actual |
|---|---|---|---|---|---|---|
| Police Officer | $24,072 | $25,780 | $39,273 | $40,226 | $32,777 | $34,842 |
| Police Sergeant | $32,235 | $37,948 | $47,518 | $47,713 | $42,340 | $46,105 |
| Police Captain | $38,966 | $43,211 | $55,091 | $55,666 | $51,096 | $55,384 |

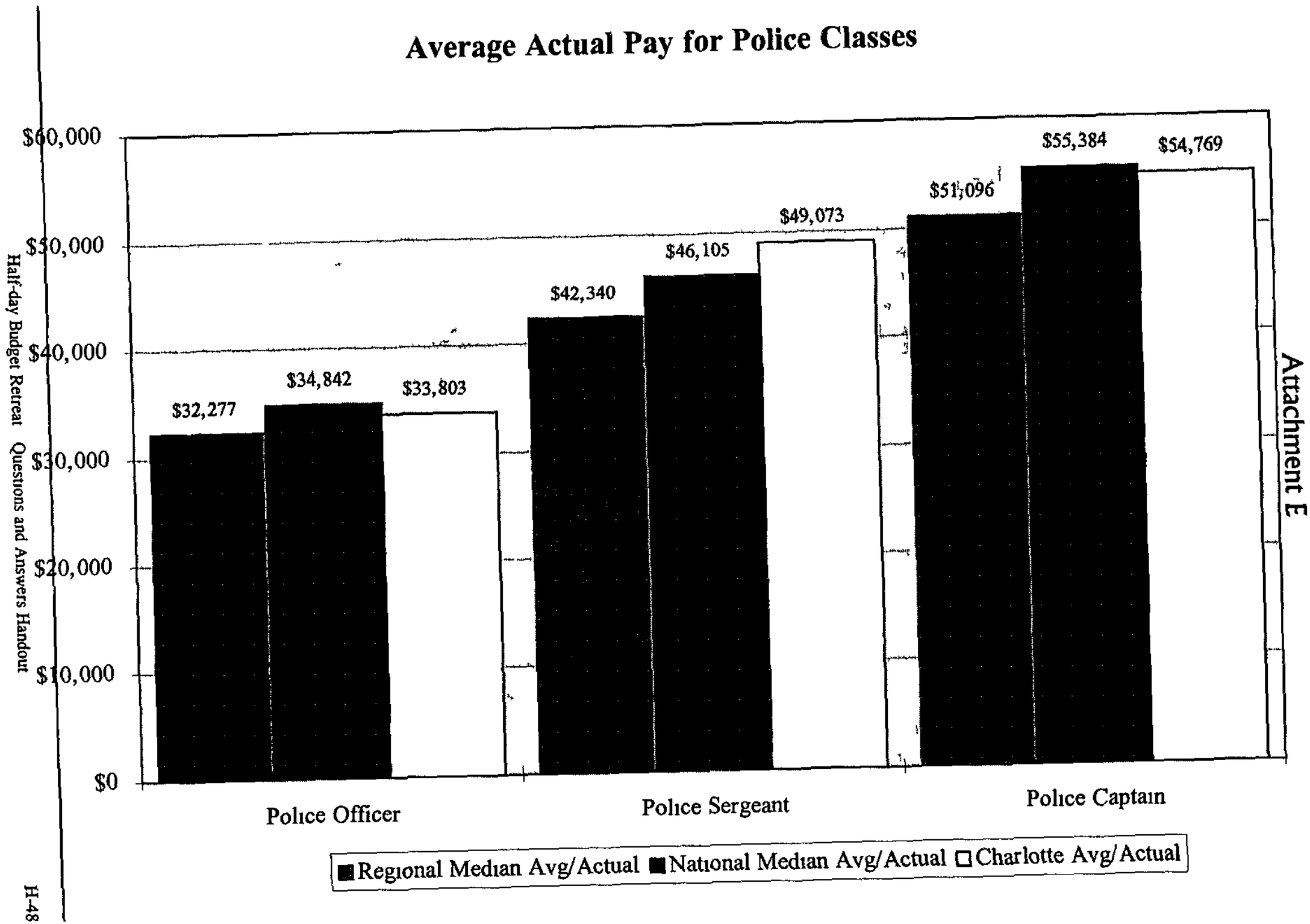
| | Regional Minimums to Charlotte | National Minimums to Charlotte | Regional Maximums to Charlotte | National Maximums to Charlotte | Regional Avg Actuals to Charlotte | National Avg Actuals to Charlotte |
|---|---|---|---|---|---|---|
| Police Officer | 99 7% | 93 1% | 99 6% | 97 3% | 104 7% | 97 0% |
| Police Sergeant | 140 4% | 119 3% | 105 0% | 104 6% | 115 9% | 106 4% |
| Police Captain | 134 5% | 121 3% | 99 9% | 98 8% | 107 2% | 98 9% |

## Range Minimums for Police Classes

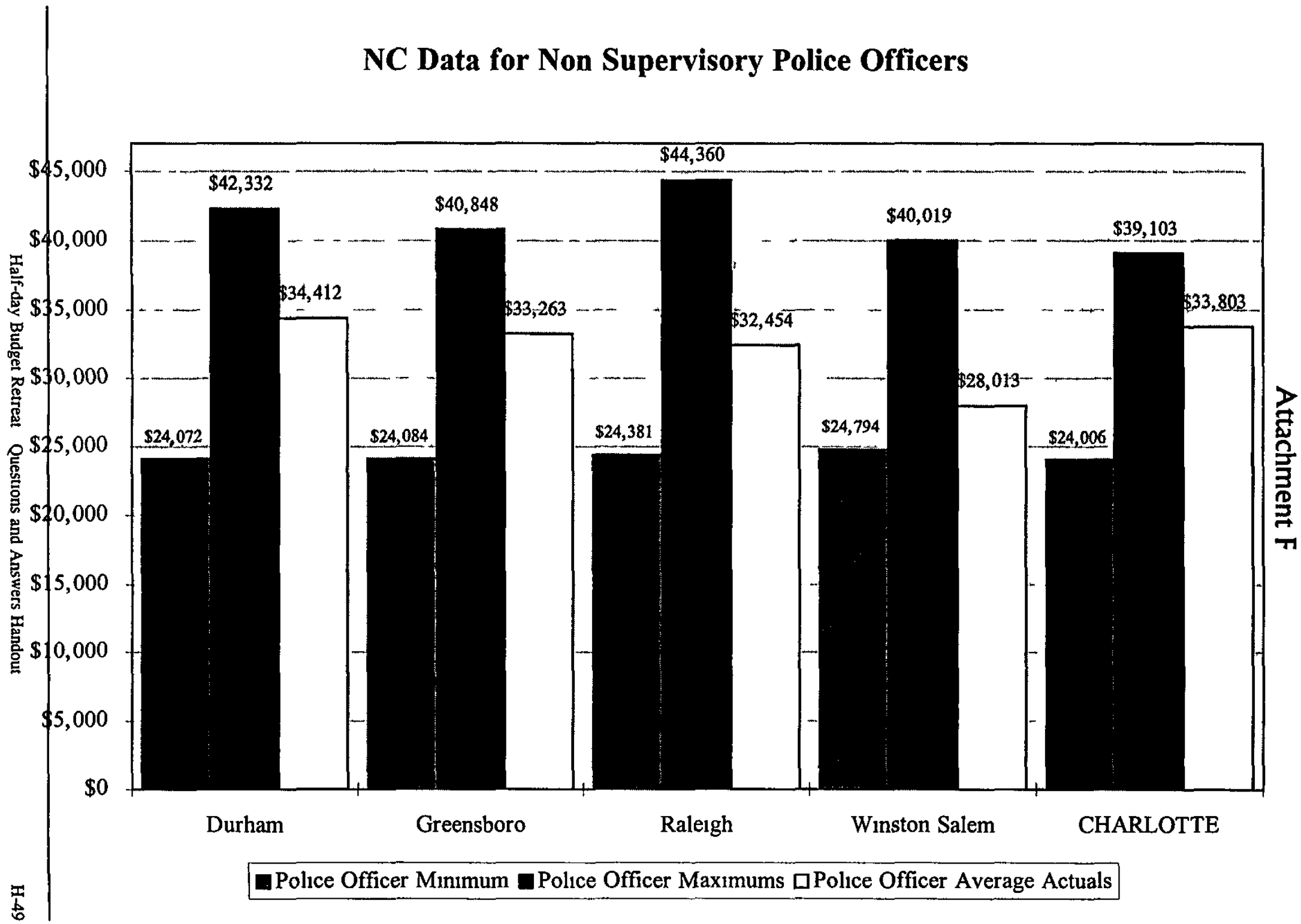


## Range Maximums for Police Classes






Attachment E


NC Data for Non Supervisory Police Officers
$45,000
$40,000
$35,000
$30,000
$25,000
$20,000
$15,000
$10,000
$5,000
$0
$42,332
$34,412
$24,072
$40,848
$33,263
$24,084
$44,360
$32,454
$24,381
$40,019
$28,013
$24,794
$39,103
$33,803
$24,006
Durham
Greensboro
Raleigh
Winston Salem
CHARLOTTE
Police Officer Minimum
Police Officer Maximums
Police Officer Average Actuals

# Attachment G

## Pay for Other Jobs Requiring Similar Backgrounds

The issue of what salary current officers might demand on entry in another field of employment in the local market is a difficult one, due to the diversity of their educational backgrounds and, in most cases, lack of experience in other fields

Perhaps the best answer to the issue of what they might command would be to look at market data on entry level technical/skilled trades and professional jobs in the Southeast The information shown below is from market surveys conducted by the compensation consulting firm of Watson Wyatt in 1996 All rates shown are median rates of actual salaries paid

### Technical and Skilled Trades Jobs

| | |
|---|---|
| Computer Operator | $21,000 |
| Maintenance Carpenter | $22,700 |
| Maintenance Electrician | $23,300 |
| Maintenance Mechanic | $21,800 |
| HVAC Mechanic | $23,900 |
| Auto Mechanic | $26,300 |
| Civil Engineering Technician | $24,800 |
| Electronics Technician | $22,800 |
| Lab Technician | $21,800 |
| CAD Drafter | $25,300 |
| Welder | $23,000 |

### Professional Jobs

| | |
|---|---|
| Accountant | $28,000 |
| Credit Representative | $26,900 |
| Human Resources Generalist | $28,700 |
| Applications Programmer | $28,900 |
| Systems Analyst | $30,300 |
| Contract Administrator | $27,000 |
| Customer Service Representative | $19,900 |
| Public Relations Representative | $24,600 |
| Buyer | $27,200 |
| Civil Engineer | $31,900 |

# Attachment H

## Information on Characteristics of Current Police Officers

The attached pay schedule for the Public Safety Pay Plan includes information on progression of Police Officers within their pay range and into the Senior Police Officer (SPO) progression As shown in the chart, employees with an associates or bachelors degree start at the same pay as a high school graduate, but receive an additional 5% at the end of field training (usually about 8 months after hire) At the end of their pay range, the associates degree employee will be 5% above an employee with a high school diploma, a bachelors degree employee will be 10% above the high school graduate and 5% above the associates degree employee This approach to educational incentive pay was one requested by both the Police and Fire employee committees who worked with Human Resources on the design of the Public Safety Pay Plan

Also shown on the attached chart is data on average pay and number of incumbents within each Police Officer class in the Public Safety Pay Plan The charts below provide additional information on age, tenure and educational levels for Police Officers

| | Average Salary | Average Age | Average Tenure with City |
|---|---|---|---|
| Police Officer | $28,540 | 28 8 | 3 8 yrs |
| Senior Police Officer I | $35,828 | 33 7 | 10 0 yrs |
| Senior Police Officer II | $38,688 | 32 6 | 8 5 yrs |
| Senior Police Officer III | $41,422 | 38 4 | 14 2 yrs |
| All Officers | $34,068 | 32 5 | 8 0 yrs |

**Educational Level**

| | High School | % of Total | Associates Degree | % of Total | Bachelors Degree | % of Total |
|---|---|---|---|---|---|---|
| Police Officer | 198 | 35% | 49 | 9% | 317 | 56% |
| Senior Police Officer I | 52 | 49% | 13 | 12% | 42 | 39% |
| Senior Police Officer II | 51 | 53% | 17 | 18% | 28 | 29% |
| Senior Police Officer III | 118 | 35% | 80 | 24% | 140 | 41% |
| All Officers | 419 | 38% | 159 | 14% | 527 | 48% |
| Officers Hired Since 1/1/92 | 129 | 29% | 32 | 7% | 277 | 64% |

# FY97 PUBLIC SAFETY PAY PLAN

## POLICE OFFICER CLASSES

| | Average Salary | # of Emps | New Hire | Years of Service 8 mo | 1 8 | 2 8 | 3 8 | 4.8 | 5 8 | 6 8 | SPO I Min 5 5 | SPO II Min 6 5 | SPO III Min 7 5 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Police Officer | $28 540 | 564 | All $24 006 | HS $25 206 | HS $26 466 | HS $27 790 | HS $29 179 | HS $30 638 | HS Max $32 170 | | | | | | |
| | | | | 2 or 4 Yr* $26 466 | 2 or 4 Yr* $27 790 | 2 or 4 Yr* $29 179 | 2 or 4 Yr* $30 638 | 2 or 4 Yr* $32 170 | 2 Yr Max* 2 or 4 Yr* $33 779 | 4 Yr Max* 5 4 Yr* $35 468 | | | | | |
| Sr Police Officer I | $35 828 | 107 | | | | | | | | | HS Max $35 468 | 2 Yr Max $37 241 | 4 Yr Max $39 103 | | |
| Sr Police Officer II | $38 688 | 96 | | | | | | | | | | HS Max $37 241 | 2 Yr Max $39 103 | 4 Yr Max $41 058 | |
| Sr Police Officer III | $41 422 | 338 | | | | | | | | | | | HS Max $39 103 | 2 Yr Max $41 058 | 4 Yr Max $43 111 |

* 5% or 10% educational incentive pay for Police Officers with a 2 or 4 year degree rates for non-degreed employees are identified by HS (High School Graduate)

Employees with a 2 or 4 year degree receive an additional 5% increase after finishing field training (usually at about 8 months)
Police Officers may enter the Senior Police Officer Program at 5 5 yrs At 6 5 yrs of service and one year at SPO I level they can go to SPO II At 7 5 yrs of service and one year at SPO II level they can go to SPO III

Attachment I

# Minutes

**(Please place in Blue Half-day Retreat Notebook behind the last page (M-61) following the Minutes tab.)**

March 18, 1997
Budget Retreat
Minutes Book 110, Page 775

The City Council of the City of Charlotte convened for a Budget Retreat on Tuesday, March 18, 1997, at 2 15 p m in Room 267 of the Charlotte Mecklenburg Government Center, with Mayor Pro Tem Al Rousso presiding until noted Councilmembers present were Charlie Baker, Patrick Cannon, Mike Jackson, Nasif Majeed, Don Reid, Ella Scarborough, Tim sellers, Sara Spencer and Lynn Wheeler

**ABSENT:** Councilmember Malachi Greene.

Mayor Pro Tem Rousso called the meeting to order at 2 15 p m and called on Kurt Walton, Director of Budget and Evaluation to give the Budget Process

Kurt Walton, Director of Budget and Evaluation, stated Goal #5 deals with the 2015 Plan which is to reserve some of the new capacity and as they discussed this it seemed to be too firm so this goal makes it basically a year two goal After they approve the 2015 Plan during this budget cycle, they would look at funding some of the key action steps in that Plan, but it does not reserve any capacity and it does not fund anything for approval Goal #6 deals with revenue mutual property tax after the property re-evaluation The new reassessed property values takes effect next January, therefore the tax rate they set in June is not impacted by the evaluation

Councilmember Jackson said the School System is committing to implement long-range plans that will be in conformance with the City adopted plans or the 2015 Plan He said that is a huge move from the way things have been done in the past He wants to make sure the Council has some process where they make sure they have them come in the process and work with them

**Mayor McCrory arrived at 2:20 p.m.**

City Manager, Pam Syfert, stated there was discussion in the Leadership Team Meeting about a way to have the discussion with the School System about some of the opportunities where the City and School could work more closely together

[ Motion was made by Councilmember Jackson, seconded by Councilmember Scarborough, ]
[ and carried unanimously, to approve Goal Nos 5 and 6 as presented ]

* * * * * * *

CHANGES IN BUDGET CALENDAR

Mr Walton gave the Council two changes in the Budget Calendar - The Budget Presentation will be on May 12, 1997 at 4 00 p m instead of May 19, 1997 The June 10th meeting will start with lunch at 12 30 p m , move to the Council Chamber at 1 30 p m for the meeting instead of 2 00 p m and the meeting will end by 5 00 p m in order to be out in time for the County Commissioners to use the facilities for their meeting

* * * * * * *

FINANCIAL PARTNERS

Mr Walton directed the Council to pages 3 - 8 of the booklet on Financial Partners, which gives an overview of the general fund financial partners He stated there were two new request, one from "Stop the Killing" and one from the Latino/Hispanic Community He said they would be reviewing those applications over the next month and he has a recommendation for the Council on those

Responding to a question from the Mayor regarding Stop the Killing, Mr Walton said they funded $5,000 about 2 or 3 years ago and that organization has not requested funds for at least two years

Councilmember Rousso asked for information on the Latino/Hispanic Community as to what those request are for

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Mr Walton said their services on first reading appear to be more county oriented, but it is estimated that the Latino/Hispanic population will be 50,000 in Charlotte/Mecklenburg by the year 2000

* * * * * * *

ARTS AND SCIENCE COUNCIL

Cyndee Patterson, thanked the Council for allowing them to make their presentation on the Arts and Science Council and introduced Michael Marsicano who gave a slide presentation on the various Arts and Science Programs

Michael Marsicano, stated the Arts and Science Council is a proactive, non-profit organization, providing planning, oversight and the funding required to insure and support a vibrant and culture diverse arts and science community in Mecklenburg County for the education of the children and the enjoyment of the residents There are 42 cultural institutions under the Arts and Science Council Umbrella. The total budgets of all the groups amounts to $43 million and the private sector makes up 82% of the total budget. Government support is 18%, broken down between the City at 9%, the County at 7% and the Federal State allocation is 2%

Mr Marsicano said the Council needs to know the annual service indicators of the groups under the umbrella of the Arts and Science Council The Arts and Science Agencies had 35,512 activities in any one year The annual attendance to those activities is 2,417,202 people, broken down to 51% adults and 49% are the youth The racial make-up of the audiences are 75% white, 21% African-American and other non-white about 4% He said the Arts and Science Council gives away $ 89 of every dollar and only $ 11 on the dollar goes to fund raising and their own operation He said volunteers also play a big part in fund raising for the Arts and Science Council

Mr Marsicano said the largest thing on their plate today is the next Cultural Action Plan The last time they did a Cultural Action Plan was 1991 and prior to that was 1974 They hope to begin doing these on a five-year plan He showed slides of the different groups involved with this

Councilmember Rousso asked why the Charlotte Philharmonic Orchestra was not included in the 42 organizations which are funded by the Arts and Science Council?

Mr Marsicano said he wanted to make sure everyone understands the 42 organizations Of the 42 only 19 have achieved the position of getting a basic operating grant, so there are 23 of the 42 which does not receive an operating grant. He said the Philharmonic was one of those larger groups and resigned from being part of that group, for reasons they have probably shared with the Council, but he would not want to leave anyone with the impression that they are only one of the 42 which did not receive an operating grant. He further stated they had four volunteer citizen panels look at this and all four reached the same conclusions year after year He said their process is based on these volunteers looking at these issues

Mr Rousso said he believes the Charlotte Philharmonic Orchestra deserves a little more support than that.

Mr Marsicano asked what would be his recommendation to the Arts and Science Council other than to just fund the group without it going through the process that everyone else goes through?

Ms. Patterson said they have guidelines established which organizations have to meet in order to be funded and it is next to impossible to get funded if they do not meet those guidelines

Councilmember Reid said he believes there is discrimination in the process and if they used the same process with regard to funding in the MWBE program, there would not be a black contractor in town with a contract. He believes they should use some affirmative action because this organization probably plays for more people than any organization which is funded Mr Reid

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said they funded the symphony when they were bankrupt. He said he feels, and many people in the community fee, that the reason the Charlotte Philharmonic Orchestra is not funded is because of some of the big contributors who do not want to take money away from the symphony and give it to the Philharmonic He said he did not buy the argument as to why they are not funded because the Philharmonic put together an entire book of all their minutes, all their IRS forms, all their audits and everything He feels they are doing a great job for this community and it is absolutely not acceptable to him that they do not find a way to fund them Mr Reid told Mr Marsicano that he did not want to get involved in the process, but wants him to find a way to fund the Philharmonic and that is his bottom line

Mayor McCrory requested more information on the specifics of the criteria

Mr Marsicano asked Mr Reid if he would like for the Arts and Science Council to arbitrarily over rule those panels and fund certain groups that have a particular by other major donors, or would he like them to standby a legitimate time honored, and very effective funding?

Mr Reid said they have legitimate groups performing an illegitimate program is the say he sees it. That illegitimate program is splitting some organizations which he feels deserve some funding This one should not be excluded because it serves too many people in this City and all this money the City is giving belongs to everybody

Councilmember Sellers said they are now asking for folks to say what they did last year and what they plan to do this year and asked if there were any other specific changes which have been implemented in the process in the past year, either as a direct result of the task force or otherwise, as to how they decide who gets what and why

Mr Marsicano said they have included in the application pursuant to the public funding task force, if a group identifies art work they may be doing as potentially controversial, they have asked them to give a plan for how they will approach the community with that particular work as part of the grant process

Ms Patterson said they also said they had to abide by the North Carolina State Law

Councilmember Majeed asked if the Arts and Science Council had held all the other art stakeholders to the same criteria of funding as the Charlotte Philharmonic

Mr Marsicano said those who have reached receiving the grant category, means their total profile which does not mean every item in that profile, the total profile have reached those criteria

Mr Reid said the Symphony is funded at approximately $1 6 million and the budget for the Charlotte Philharmonic is roughly $395,000 so his argument is that you really cannot compare the two He asked Mr Marsicano which of the two has the most ticket sales, to which Mr Marsicano said the Symphony by far

Mr Reid said his concern is that they have some large donators that prevent the Arts and Science Council from being fair When they have major donors who say if they take any money and give it to that orchestra they will not give anymore, that unlevels the playing field

Mr Marsicano said never has a board member influence a volunteer panel on that subject

* * * * * * *

**CHARLOTTE CONVENTION AND VISITORS BUREAU**

Keith Haywood, Chair of Convention and Visitors Bureau, stated the Charlotte Convention and Visitors Bureau was formed in 1984 as a private non profit corporation They are governed by a 33 member board of directors which include equal representation from the hotel industry, general travel industry and general business industry He said they are in the business of maximizing the travel industry's economic in this community The impact is nearly $2 million

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annually and helps support 36,000 jobs in the Metro/Charlotte area. They have 652 members from the business area which chose to be financial partners with them in securing travel and tourism business to the area. Their operating budget is $3 8 million for fiscal year 1997, which comes from a portion of the hotel/motel occupancy tax, a portion of the prepared food tax and from the private sector

Melvin Tennant, CEO of Charlotte Convention and Visitors Bureau, gave a slide presentation of the Charlotte Convention and Visitors Bureau which gave Council detailed information on the different divisions of the CCVB, the Sales Division, Marketing Division and Financial Affairs and Membership Division

Councilmember Rousso asked about the decrease in attendance at the Convention Center

Mr Tennant said to the best of his knowledge that decrease will not continue as he has seen some stabilization in that area. There are a couple things that has caused that to happen and number one is that they started marketing the Convention Center in 1991 and 1992 and had a major push to put groups in even before it opened. When it actually opened they had a lot of business they had gotten four or five years before they opened the doors During that time they took a lot of the available dates in the building and now a lot of dates are just not available To a certain extent they were a victim of their own success Another thing is that due to the increase in the corporate transit business, individual business traveler, among many of the major hotels, some of the hotels are not able to give as many committable group rooms for conventions so they have ended up having to book smaller conventions

Responding to another question from Mr Rousso, Mr Tennant said a lot of the comment cards they get back on the Convention Center state that parking is one of the major objections people have

Steve Camp, Director of the Coliseum, Convention Center and Auditorium Authority, said that is one of the problems they have, but most of the time that does not relate too much to the room nights

Councilmember Reid asked about the number of bookings at the Convention Center in 1995 which was 62 and in 1996 it was only 47 and asked if that is the total number of events that occurred at the Convention Center

Mr Tennant said no, that is only conventions that are bringing in folks from around the country that are using overnight hotel accommodations That is not an accurate reflection of all the events at the Convention Center Mr Tennant said the total economic impact of the bookings was $369 million and compared to the cost of the Convention Center of $141 million, they have had a tremendous economic impact.

Mr Tennant said the Convention and Visitors Bureau has come a long way, but have a long way to go and with the continued help of the Council he feels they can continue to build the travel and tourism industry, not only for the benefit of the CCVB, but for the industry as a whole

Responding to a question from Mr Rousso, Mr Tennant said of the total budget for fiscal 1997 of $3 8 million, 89% of that comes from the room tax and prepared tax

Councilmember Sellers asked if there had been any on going effort in the past to set specific goals or definite measures that you have performance by in some of these areas?

Mr Tennant said their primary measure of success is room nights, which for this fiscal year the goal is 340,000 He said each of the divisions have goals of which they give quarterly reports, therefore he feels they have a very well maintained goal process

Responding to a question from Councilmember Reid, Mr Haywood said Mr Reid mentioned that he said some non-room night generating events are in there and said when they were first given responsibility for this program in 1986 the grants program was specifically for community related

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activities. He said they have tried to make the grants program something that will allow them to generate future business, using it as an investment tool With regards to the uptown shuttle question, he said there are several organizations out there both public and private which are funding this because they see this as a value to potential visitors as an amenity that will make the destination more marketable He said if it were possible for one organization to fund the whole projects he believes it would have been done, but Duke Power came forward with those dollars and the equipment and in order to operate it he does not believe any one organization was in a position to have all those dollars in their budget to make this happen

Mr Reid said the budget for the Convention and Visitors Bureau went from $3 4 million to $3 8 million which is a 12% increase and asked where did most of that money come from, to which Mr Tennant said through the growth and the occupancy and prepared food tax Mr Reid said it seems to him they need to re-evaluate and see just how much money they really need and simply because it is growing does not necessarily mean they should be spending it in the area they are working He believes a $400,000 increase in one year is a mammoth increase and at some point they need to evaluate what they are doing in terms of how much money they need as opposed to how much they have grown

Mr Tennant said that growth was due in large part to their sales efforts They are set up to get a percentage of the room tax collections and if room tax collections are coming in higher that is a reflection of the additional business they are bringing into the City Mr Tennant said with the budget of $3 8 they are still on the low side compared with the cities with whom they have to compete every day Cities such as Boston, Cincinnati, Indianapolis are out there in a big way promoting and selling their cities and as a result, they are able to bring in more business and are seeing growth in the hotel industry

Mayor McCrory said he agrees that the number of room nights is their goal, but he assumes there are some connections that bring in regardless the number of room nights, a lot more revenue than other conventions due to the quality of the convention or how much cash they have He said he would like to get some quality measures in the volume of numbers He had rather have 40 quality conventions than perhaps 60 conventions in which people come and spend the night, but they do not spend much money while they are here

Mr Tennant said they are very careful about, not only what conventions they book, but when they book them It has a lot of do with need analysis and one of the key times they need business in this City is week-ends, summers and holidays, therefore it is common practice to solicit groups which have flexibility in their dates and can meet at some off peak times for the Convention Center Those type do not spend as much as the prime time groups which may show up in May or October

* * * * * * *

**HOUSING PARTNERSHIP**

Ray Jones, Chair of the Charlotte-Mecklenburg Housing Partnership, presented a video of the latest marketing campaign, which will illustrate their success in the neighborhoods of Charlotte

Pat Garrett, Housing Partnership, said she believes the video reveals what they do with rental housing as well as home ownership She said one of the things they have tried to be proactive about is customer satisfaction and they have set up a separate department with two people in it, whose job is to do warranty work and make sure they are following up with the customer on a timely basis Ms Garrett said one of the things they must do is have a house that is going to be a good house, and if properly maintained, is going to last at least the term of the mortgage They should be creating housing that will last as long as possible

Ms Garrett showed photos of some of the houses which have been completed in order for Council to see what the houses look like which they have done

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Responding to Councilmember Cannon regarding their goals, Ms Garrett said had approximately 35 to 40 houses in Genesis Park which were boarded up and were deteriorating very badly Because they had been boarded up for a period of time they were experiencing leaks, and of course vandalism is always a problem She said they made the decision to get those houses in shape to be sold, which was goal #2

Mr Cannon asked if the City could do what the Housing Partnership is doing at a more efficient costs as it relates to rehab and new construction?

Stanley Watkins, Director of Neighborhood Centers, stated they would like to get that information together and bring it back to the Council in a few weeks. He said they would have to get with the Housing Authority with regards to the costs for various types of rehab projects There are a lot of variables with regards to rehab and even new construction

Responding to a question from Mr Cannon, Ms Garrett said what they are trying to do is keep the neighborhoods looking the same, as an example, in Seversville they are trying to keep as much of the look of the mill village. There are some real advantages to that when they start the sales campaign and they look at the nine foot ceilings, etc They still have the acquisition cost and when you add in having to pay too much to acquire two rental units then they find there are deteriorated boards, roof, etc which has to be replaced She said if they were comparing only new construction to rehab she believes it would be pretty close on the rehab costs being the same as new construction The difference seems to be in the acquisition

Councilmember Sellers said with respect to the rehabilitation of units, are there any standards to go in and replace all windows or do it at a certain quality level

Ms Garrett said in almost every case they have replaced the roof, replaced all systems, electrical, HVAC in the City-With-in-A-City area. She said they have a written standard like a specification book and the specs would detail all of that.

Mr Sellers asked if there were variations in the properties or would they all be the same?

Ms Garrett said they are generally the same for Genesis Park because they are converting from a duplex to single family units The original structure had two bathrooms, two kitchens, all of which has rotted the floor Seversville is pretty much the same, but in some cases they are building a third bedroom on the back if there is space on the property

Mr Sellers asked about the square footage to which Ms Garrett said they are 1300 square feet in Genesis Park, which are the larger units Seversville has some units which are 1000 square feet. Most of the houses are three bedrooms, some are four but very few two bedrooms

Councilmember Reid asked if the houses go on the tax roles at the closing price or at the total costs, to which Ms Garrett said they go at whatever they value at, which she assumes is the closing cost

* * * * * * *

**The Council took at 5 minute break at 4:50 p.m.**

**CHARLOTTE HOUSING AUTHORITY**

Harrison Shannon, Housing Authority, said the question has been asked quite often "what is the Housing Authority and what does the Housing Authority do?" The Charlotte Housing Authority is a public corporation that was chartered through the General Statutes The Board is appointed by the Mayor and Council and the Board is responsible for the staff

Mr Shannon gave a slide presentation on the Housing Authority Their Mission Statement is to support and encourage families to move up and out of public housing and to integrate them into the economic mainstream The Authority serves over 6,000 families which translates into over

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21,000 individual citizens of the City of Charlotte who would otherwise be homeless or living in substandard conditions

Mr Shannon said prior to 1990 the Housing Authority was in bad financial condition and a lot of work has been done to correct that. He feels if this had not been done they would not have received some of the grants they have received He said to keep from reverting back to that status they have developed a plan in each Department of the Authority and they are charged with the responsibility of developing an annual management plan

He pointed out in the slides the different programs provide by the Authority as well as the scholarship fund which is to help the young people get into school

Mr Shannon said the question was asked by Council as to how many units do not meet the standards of the City Code and according to the last report it is less than five units which have some minor things that needs attention

Kimberly Minter, Interim Director of Residents Services, showed a chart which indicates what they have been doing with their FSS Program which is divided into three categories The first indicates the goals, which is the number of graduates, the second is for private rental market and the third is home ownership In 1994, which was the year of the inception of the program, the goal was 25, but they reached 31 In 1995 they had 23 which were private rental market and 46 that were private home ownership In 1996 they had 18 which were private rental market and 24 represented part ownership

Ms Minter said they have 172 families which have graduated from their programs since 1994 They have 125 families who are in the last two years of the five-year program

Charles Blackwell, Housing Authority, said one of the questions that has been raised is where does the money for the Authority come from and what do they spend it on He said the residents do pay rent and they collect about $7 5 million in rents which are based on 30% of income He said the largest line item under their operating receipts is money they receive from Federal grants and subsidies At least half or approximately $24 million of that is funding received under the grants, the Earle Village and Dalton Village grants He said there is another $11 million that comes from their Section A Program, another $7 million is received in the low income housing program under Performance Funding Subsidy Another $6 million is the rent program which allows them to make a lot of improvements. In the 1997-98 budget they have $833,000 from the City and a large piece of that is in support of the Family Self Sufficiency Programs and SNAP program. Another $275,000 is the operating subsidy from the City on the McAlpine Terrace and property, which is a tax sheltered project developed about 6 years ago

Mr Blackwell said another question raised was how many residents do they have with past due rent balances He said they have 321 out of a total of 3,683, which have past due rentals of $67,000 He does not consider that unreasonable given the clientele they serve

Another question was do they solicit funds from the private sector and the answer is no, except for funds that are solicited by the Foundation for the Carolinas which administers the scholarship program

Under the operating expenditures they have $5 7 million for administration which includes all the salaries related to the central office, as well as all their site administrative force He said they had strengthened their entire budget process and know line item by line item different expenses that had not been isolated before and now can be monitored and controlled Residence services of approximately $2 7 million and $1 3 million relates to dollars that are in Hope 6 grants which will be expended over the next fiscal year to enhance programs related to the residents He said they pay the utilities for most of the housing communities which amounts to $5 1 million Maintenance and operations are $3 9 million which is not enough to maintain the properties the way they should be maintained General Expenses of $3 3 million is a catch all of a lot of things including $1 7 million for employee benefits such as retirement plans and insurance Rent to owners under the Section 8 Program is $11 million which they pay to private landlords He said their total

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operating budget is $31 8 million

Under non-routine expenditures they have extraordinary maintenance of $5.5 million which is their large capital dollars and fixed assets Betterments and additions includes everything from apartments to unfitting the equipment and personal property additions are included in that $1 7 million Other expenditures is $21 million which is basically Earle Village and Dalton Village. Mr. Blackwell said they have an operating loss of approximately $331,279 which will be funded from the operating reserves

Harry Byrd, Housing Authority, stated the Department of Housing and Urban Development requires Housing Authorities to conduct comparability studies every three years The purpose of this study is to insure that the salaries of the Housing Authorities are comparable to those of local government agencies He said a study was made in 1994 and it was determined that their salaries were competitive after researching and reviewing four local government entities He said they looked at the City of Charlotte salary structure, the Hospital Authority, CPCC and the Board of Education. He said another comparability study would be done in 1997 He said their benefits plan is very comparable to the City of Charlotte, however the Housing Authority pays 100% for the employee and the employee pays 100% for dependent coverage They also have dental and vision care and a $20,000 life insurance policy paid for by the Housing Authority Disability is mandatory and the Housing Authority pays 50% of that premium They also have a retirement which is comparable to other local government agencies

Councilmember Reid asked about the vacation and holidays, to which Mr Shannon said they get 12 vacation days per year and their holidays are comparable with the City They also have 12 sick days a year He further stated a person has to work six months before they are eligible for vacation or sick days

Mr Reid said after one year they can get 34 days a year, to which Mr Shannon said yes, that is comparable to the City, County and other government agencies

Velva Woollen, Chair of Housing Authority, stated her number one goal is better communication in their community and in the broader community Number two is better relationship with the RAC (Residence Association) and number three is to get their arms around the Self-sufficiency component or how they are going to move the residents up and out of public housing

Councilmember Jackson referred to the $331,000 deficit and said the City has to budget according to what they have and he believes the Authority will be inadequately funded by the Federal Government for a long time

Mr Shannon said they have been under funded for the last 10 to 12 years and they still have been able to stabilize their financial condition and get the reserves up They have been able to get less and do more and they know this means they have to be much more efficient and work smarter

Mr Shannon said one of the reasons they were willing to accept the $331,000 in deficit was because part of it was due to everything in Earle Village and Dalton Village was off line and hopefully this will be back on line this time next year

Wilfred Neal, said he did not believe it was intended to say they were under funded by the Federal Government, but what was intended is to show that they were less funded by other housing authorities of comparable size because they had done a good job managing He said HUD will fix it so they do not get as much money because they are not in as bad shape He said HUD puts rules and regulations on the Housing Authority which cannot be changed He believes that is a big portion of why they see a deficit In reality a $331,000 deficit on a $50 million budget is like and the point is, as long as HUD has regulations on them where they cannot change the rents, cannot cut out programs or people on certain things which is something everybody needs to understand when they are dealing with the Housing Authority

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Mr Jackson said he wants to make sure a one time event is not a permanent event and that there is a plan to address it.

Councilmember Majeed asked about the sale of the Addison Apartments

Mr. Shannon said they sold the Addison Apartments and took the proceeds and used it to help supplement some programs in areas where they had some shortfalls

Mayor McCrory said he hopes they put that money back in the capital fund and not in the operating account, to which Mr Shannon said it is not in the operating

The Mayor referred to the statement about the federal regulations from HUD which tie their hands and asked Mr Shannon to please let the Council know what those are He said he was Chair of the Housing Committee of the National Conference of Mayors, in which Rich Daly has tremendous influence over President Clinton Therefore if they do not know what those things are which are handcuffing the Authority, in specifics, they cannot get much done

Mr Jackson said the problem he has is that the Authority has a package they are ready to give to their Congressman, but they have not given it to the Council He said the Council feels the Authority does not work for them, do not listen to them or respond to their request and this is an example He said he believes staff would have like to see what the Authority has prepared and probably could have given Council feedback on it. The Authority is ready to give Federal elected officials information which they have not shared with the Council

Councilmember Reid said he recalls the last review they saw on the SNAP Program they did not have any better crime results than in areas where they did not have the SNAP Program, so he wonders why they should continue to fund something where they do not have any results

Mr Shannon said they have some work to do in that area

Mr Reid said he would like to see the comparable study that shows what is required there He questioned the salary and benefits of the employees of the Authority He also asked Mr Shannon about the health care after retirement of the employees

Mr Shannon stated there is no provision for health care after retirement

Mr Reid said he does not believe they are spending enough money on maintenance and said that is why they had to have $30 million to bail out Dalton Village and something needs to be done Because of where they are today and the help needed in various areas of the Authority, he wonders if the City would not be better off if the Authority reported directly to the City Manager rather than to a part time board He believes a supporting full time staff might be in their best interest

Councilmember Scarborough referred to the 12 sick days given employees and said she hopes they are doing what industry is doing which is you don't have sick days, but they are available if you are sick. She also referred to the cleanliness of the different public housing locations and wants to be sure the tenants understand their responsibility of picking up paper and little things that would make the properties look better She also suggested the Authority report quarterly to the Council, perhaps at their dinner meetings to talk about their goals, etc just to keep the Council informed

* * * * * * *

## AUDITORIUM COLISEUM CONVENTION CENTER AUTHORITY

Geraldine Sumpter, stated the Mayor and Council appoints seven members of the Auditorium Coliseum Convention Center Authority and they manage five buildings, Independence Arena, Ovens Auditorium, Old Convention Center, New Convention Center and the Charlotte Coliseum She said these five buildings have a net worth of approximately $250 billion They have a full time staff of 200 people and a part-time staff of 2200 people Their operating budget is

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approximately $22 million and in the fiscal year 1996 they hosted 693 events with 2,762,000 people attending

Mike Crum, stated for the past 14 years the Auditorium Coliseum Convention Center Authority's budgeting procedures has been governed by the North Carolina Budget Municipal Control Act. They start their budgeting process in January by sending a memo to all Department Heads soliciting their input along three budget areas, capital improvements, event related budgets and the overhead revenues and expenses. He said they are in the middle of that process right now and hope to tie the three areas together by the beginning of May, with the budget document completed by the Finance Department by May 15 During the month of June they will give the appropriate public notice of a hearing to be held before the Authority discusses the budget. The public hearing will be held on June 25 and then the Authority will discuss and amend the budget as necessary

Mr Crum said the current financial relationship they have with the City focuses on two areas, both dealing with the Convention Center They currently receive assistance for Convention Center marketing The source of those funds are the Charlotte Convention Center Revenue Fund and they have an agreement with the City to receive assistance which totals one-half of the operating deficit recorded by the Convention Center in a given fiscal year In 1996 the sum of that assistance totaled $950,054

Steve Camp, Director of the Auditorium, Coliseum, Convention Center Authority, stated they have Ovens Auditorium and Independence Arena on Independence Boulevard and are in the process of a final addition to Ovens Auditorium which opened in 1955, the same time as the Old Charlotte Coliseum This will bring the facility in compliance with all ADA regulations and includes additional restrooms as well as an elevator that allows the disabled to get to the second level. He said this 2600 seat facility should be in place to serve the City for many years to come

He said the Council coached the Authority into reopening Independence Arena in 1993 and this has been a pleasant surprise They spend approximately $4 2 million on the renovation to bring a 1955 building up to current standards and meeting all ADA requirements He said the Charlotte Checkers added approximately $400,000 in office renovation which the Checkers paid for all of that. He said the Authority completed a $300,000 to $400,000 project last year as a hospitality area. He believes that facility will be able to attract a number of high school championships which will be good for the City He does not believe either of these facilities will require any major capital improvements in the foreseeable future

Mr Camp said with regards to the Old Convention Center, they make approximately $135,000 per year through the parking operation The second Disney movie has been completed and a third has been started and will utilize that building He said they do not make a lot of money off these things, but they get some rent and get some people down town as well as some notoriety for the City He believes this facility is at a crossroads They have not done a lot of maintenance to the facility, they kept the air and heat on so those systems are alright, but the roof of that building has always been a problem They have spent considerable amount of money every year to keep the roof in shape He said if the building is going to be sold they probably do not want to spend anything on it, but if the Council plans to utilize that building in the future they will need to make a decision to spend up to a quarter of a million dollars to get that building into reasonable shape He said he would not want to do any public events in that building in its present condition He said the building has a lot of potential from the real estate standpoint and hopefully the City will maximize that potential

Mr Camp said he had been concerned for sometime with regards to the Hornet/Coliseum issue and believes they get so involved in that issue that perhaps they ignore another great potential in this City which is the New Convention Center He believes that facility has already done a lot for the uptown He said they are faced with some land acquisitions or situations which the Council needs to address, the ABC property for the first phase of expansion and the Scott property for the second phase of expansion The potential of the Convention Center is to reach about 600,000 square feet in the next 15 to 20 years and in order to achieve that expansion, they need to acquire both the ABC property and the Scott property He said if the Council allows that property to slip

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away, they eliminate their ability to expand and maximize that facility in the future

Mr Camp said the lack of a convention center hotel has hurt the facility because International Association of Assembly Managers turned down Charlotte because they did not want to separate the group into three or four different hotels He said all the potential of the Convention Center area is there and when it all falls in place, that will be the facility that will change the face of uptown Charlotte

With regards to the Charlotte Coliseum, he has listened to what has been said and can sympathize with the problem and the situation the Council has before them He said the Charlotte Coliseum, for everyone other than the NBA Franchise, is an excellent facility It accommodates every need which the Authority serving the public mission has had to accommodate He said they just finished the Circus event and they had 100,000 people in 10 shows He realizes they were not sold out for the NCAA Basketball, but believes they sold more tickets for the first and second round in Charlotte than any other site in the country. The ACC Tournament comes back to Charlotte in 1999, 2000 and 2002 and the ACC is extremely pleased with the facility He further stated the Coliseum accommodates concerts, family shows, rodeo, truck pulls and all those events in a first class manner He said if the Council replaces this facility it is because the Hornets need a new facility, not because all the other tenants need a new facility

Mr Camp said the City has the best staff he has ever seen or heard of for operating all these facilities Time and time again people will come into these facilities and one thing that is also stated is that the facilities are handled in a first class manner The staff does an exceptional job They may make mistakes from time to time, but day in and day out they have served this community well He said with all the debate about what is going to happen to the Coliseum and the Authority, as far as he knows, he does not think the staff's leadership and professionalism has ever been affected in the way they have handled events in the facilities they manage and the Council should be proud of them

Councilmember Reid said Councilmember Jackson had to leave, but asked him to ask how they break out travel, entertainment marketing for each of the facilities and how they allocate cost for each of the facilities Mr Reid said Mr Jackson also wanted the salaries, health care, etc basically the same thing they asked for from the Housing Authority Mr Reid said he had requested previously a financial analysis of what might happen to the building in case the Hornets were not there

Mr Camp said he has that information and it was based on doing 50 events, 56 events or 62 events, which was a very conservative estimate

Responding to a concern about the dip in the number of conventions, Mr Camp asked the Council not to be concerned about the dip in the number of convention because it is not the number of conventions you do, but the quality and how much money they spend The forecast for bookings in the future is that they are ahead of what they projected and he believes the Convention Center is doing quite well He said the lack of a hotel is not showing up in this year's market, but it will show up in the figures two of three years from now

Councilmember Scarborough said she hopes parking will be considered at the Convention Center

Mayor McCrory said he gets more complaints about the back door being closed than any other at the Convention Center

**ADJOURNMENT**

The meeting was adjourned at 6 45 p m

Nancy S Gilbert, Deputy City Clerk

Length of Meeting 4 Hours, 30 Minutes
Minutes Completed April 10, 1997

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# POLICE BUDGET HIGHLIGHTS

- Additional Police Officers
- Additional Police Sergeants
- Additional Telecommunicators
- Video Cameras in Patrol Cars
- Master Police Information System

# POLICE BUDGET HIGHLIGHTS

- New Investigative Technicians in Customer Service
- New Police Helicopter
- Enhanced Field Training Program
- Enhanced Domestic Violence Enforcement
- Enhanced Special Events Coordination

# ADDITIONAL POLICE OFFICER ALLOCATIONS

- 40 COPS Grant Positions for Community Problem Solving

  (50% average funding of salary and benefits for three years)
- 41 New Patrol Officer Allocations for Call Response
- 3 Special Events, Violent Crimes Task Force, Domestic Violence

# COMMUNITY PROBLEM ORIENTED POLICING

- 40 Officers Allocated to Patrol Districts
- Officers Dedicated to Identified Problem Areas
- Building Citizen Partnerships

# NEW RADIO RESPONSE OFFICERS

- 41 Officers Allocated to the Patrol Districts
- Based on manpower allocation recommendation from Department's Majors
- Now developing a new manpower allocation model based on problem-solving

# NEW SERGEANTS

- 12 assigned to Patrol Districts

- 4 assigned, one each to Homicide, Family Services, District Attorney's Office and Internal Affairs

- Driven by growth in workload, better management of critical functions, more timely investigations, a young department and span of supervision

# VIDEO CAMERAS IN THE MARKED FLEET

- **Year One**
- $1,000,000 Start-up and Training
- Cameras in 200 Cars

- **Year Two**
- $800,000 Continuation
- Cameras in 400 Cars

- Funding through Federal Grant
- Additional $100,000 in private funding in year one will add 25 cameras

# 26 NEW TELECOMMUNICATORS

- Improve ability to answer 911 calls
- Improve screening, prioritization and routing of calls
- Present 911 system provides improved management information and allows tracking of performance
- Address problems with sick leave use, overtime and general job stress
- Acknowledge growth in volume of calls

# ADD 8 INVESTIGATIVE TECHNICIANS TO CUSTOMER SERVICE

- Handle more non-emergency and information calls
- Free police officers for other duties
- More then 30% of police reports are taken by phone by Customer Service
- Present technology provides better management information and tracking of performance

# NEW POLICE HELICOPTER

- Replace 20 year old aircraft
  - Repair and direct operating costs are prohibitive
  - Salvage value is $155,000
- Purchase price of $1,500,000 through five-year lease purchase

# MASTER POLICE INFORMATION SYSTEM

- Year one $1,750,000
- $1,400,000 grant match
- $ 375,000 laptop support

- Year Two $2,000,000
- $1,650,000 Computer Technology
- $350,000 laptop support

# MAINTAIN CURRENT LEVEL OF POLICE SERVICES

- Growth in number of police personnel
- Growth in police workload
- Increased use of technology
- Impact of decentralization and opening new facilities
  - Rent
  - Phones
  - Building Maintenance
  - Contractual Costs
  - Utilities

# ENHANCEMENT OF DOMESTIC VIOLENCE ENFORCEMENT

- Add 2 Counselors and 1 Police Investigator to the Domestic Violence Unit
- Manage expanding workload
- Provides a Domestic Violence Counselor for each Service Area
- Targets repeat calls
- Combines enforcement and prevention
- Ultimately impacts other crimes

# ENHANCED FIELD TRAINING PROGRAM

- Younger Department
- Need for higher quality training
- Develop better trainers and mentors
- Provide better rewards for trainers
- Help manage the Department's culture

As requested, the following are copies of the slides presented by Curt Walton at the April 21 Half-day Retreat.

# FY98 Budget
# Half-day Retreat

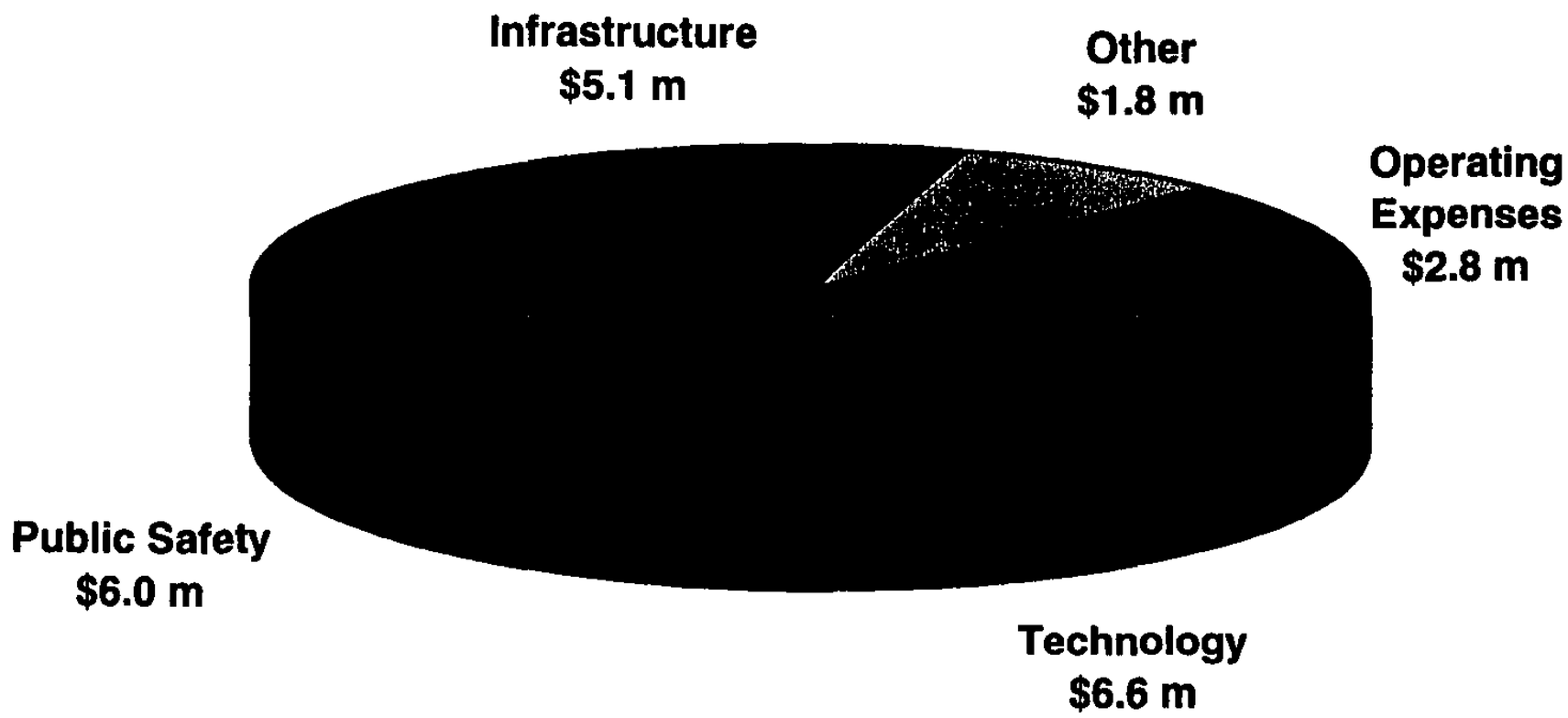
## April 21, 1997

City of Charlotte Budget and Evaluation

# Two Year Budget Guidelines

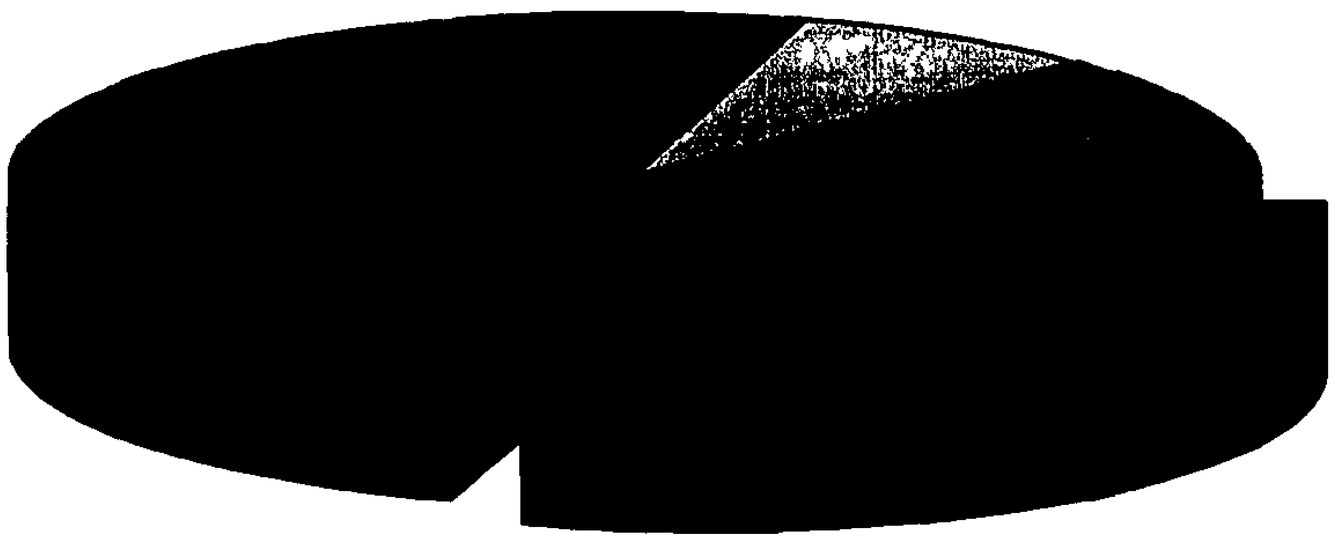
- Flat Operating Expenses
- Review Vacant Positions
- Reallocate Resources
- Review Eliminated Programs
- Where have Services Slipped?
- Priority Order by Key Business Unit

# Summary of New Requests



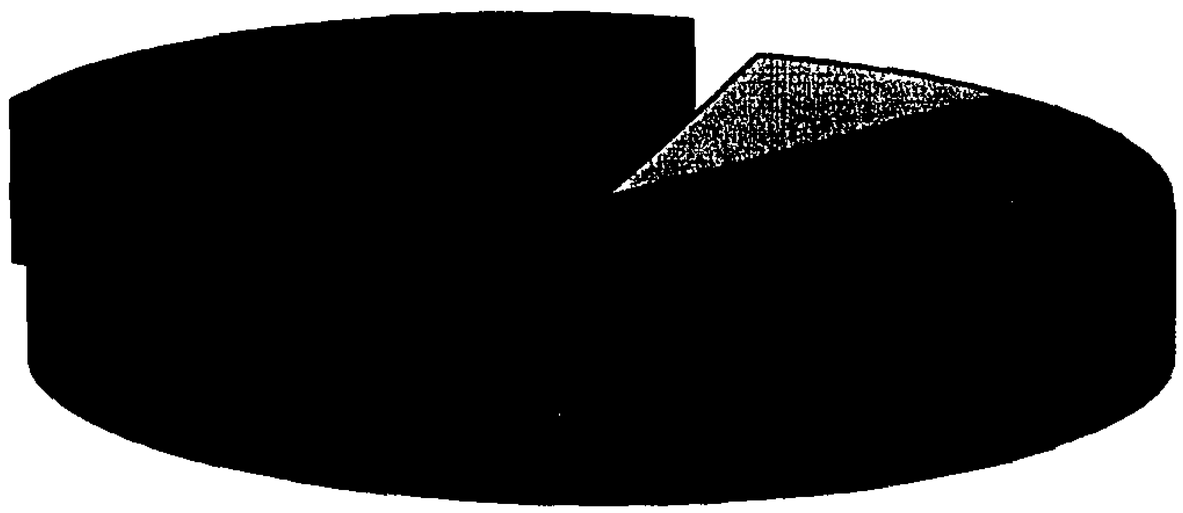

**Total $22.3 million**

# Technology
# $6.6 million



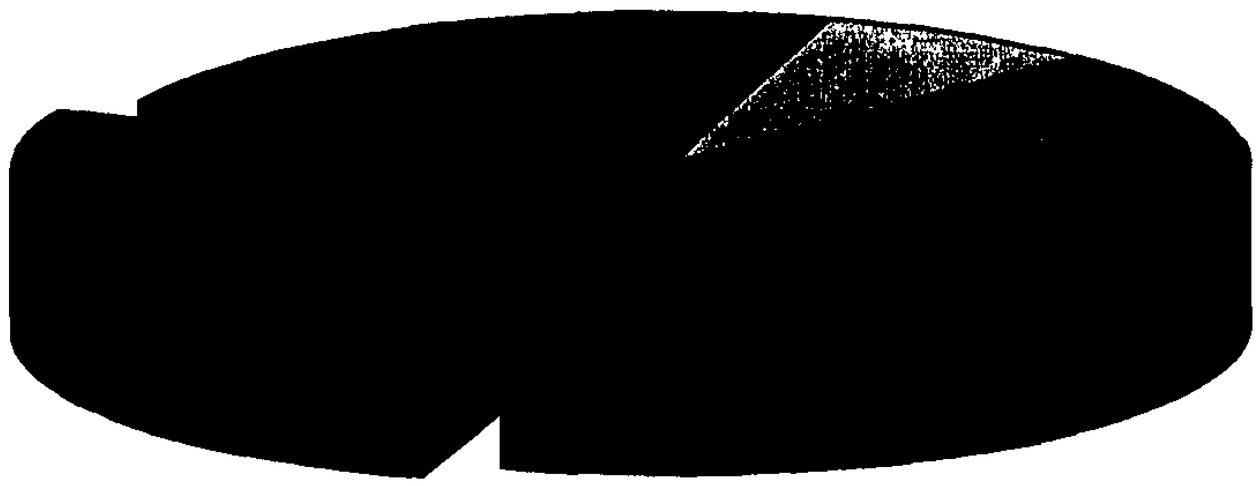
- Police
  - Video Cameras
  - Police Information System Plan
  - Radio Replacement
- Fire Computer Aided Dispatch (CAD)
- Other
  - Project Management Systems
  - Radio Replacement
  - Computer System Upgrades
- $5,000,000

# Infrastructure
# $5.1 million



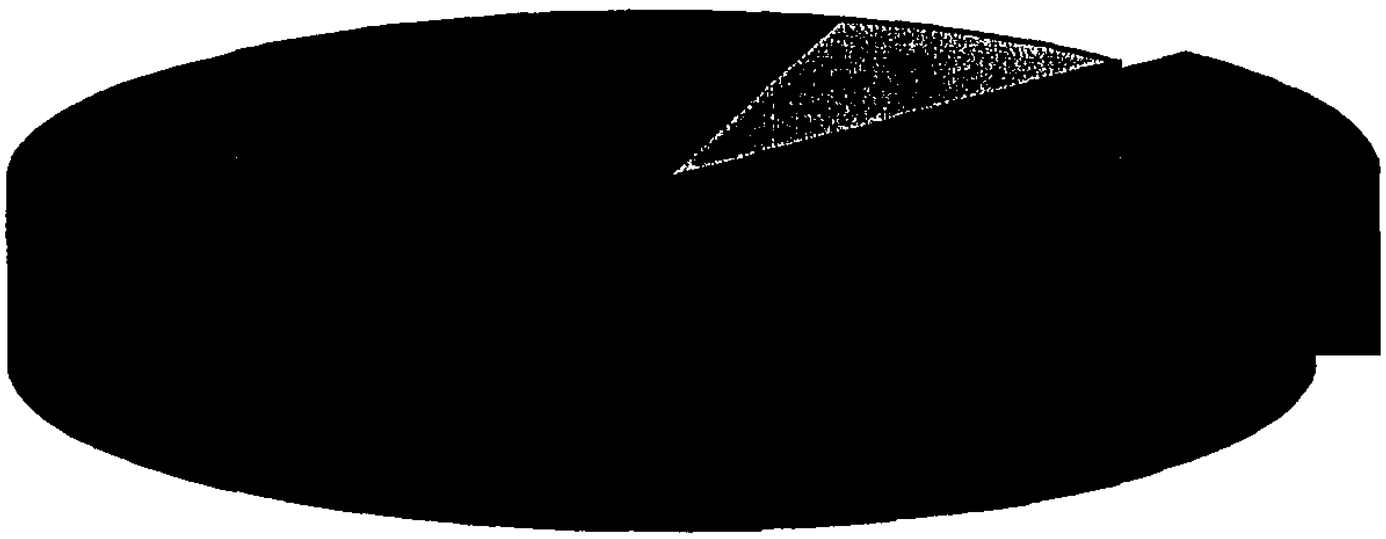
- Storm Water
- Water and Sewer
- 5-Year Transportation Plan
- Sidewalks
- Landscaping

# Public Safety
# $6.0 million



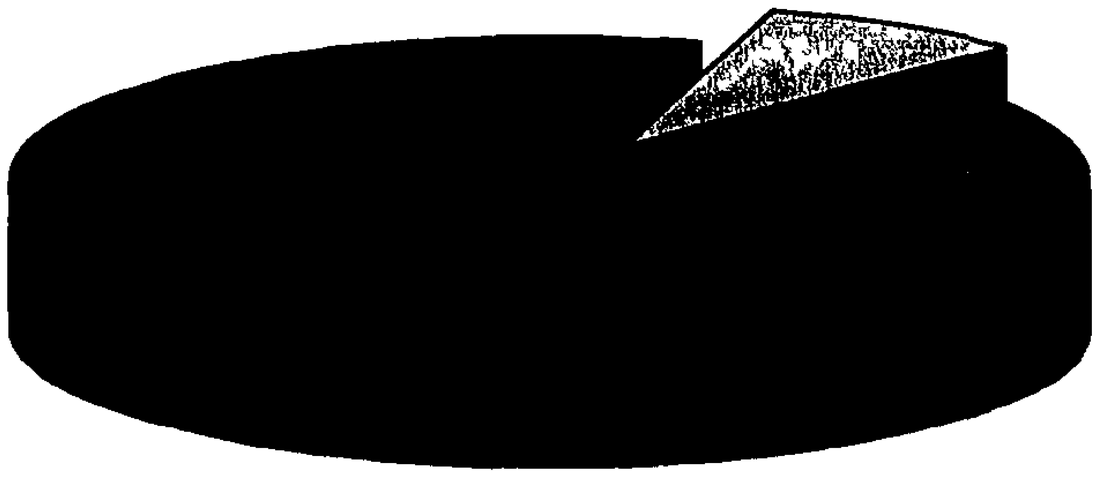
- Police
  - Community Policing
  - Service Response
  - Telecommunicators
  - Domestic Violence
- Fire
  - Organizational Study
- Transportation
  - Railroad Crossing Devices
- Radio Towers

# Operating Expenses
# $2.8 million



- Flat since 1992
- Items such as
  - utilities
  - gasoline
  - uniforms
  - materials
- Largest Requests
  - Police
  - Engineering & Property Management
  - Fire
  - Neighborhood Development

# Other
# $1.8 million



- Capital Outlay
- Administrative and Support Functions
- Increased Capacity for Citizen Access to Services

# Next Steps

- Refining Costs
- Refining Priorities
- Council Priorities
- Compare Priorities with Available Revenues
- Manager's Recommendation on May 12th

# 5 Year Transportation Plan

(in millions of dollars)

| | FY98 | FY99 | FY00 | FY01 | FY02 | TOTAL |
|---|---|---|---|---|---|---|
| **Capital** | | | | | | |
| Current Level Expenditures | $2.9 | $7.1 | $6.5 | $1.3 | $1.0 | $18.8 |
| Expansion Expenditures | 12.5 | 4.7 | 108.0 | 12.0 | 13.4 | 150.6 |
| Revenue Gap | 0 | 0 | 2.7 | 4.0 | 3.7 | 10.4 |
| **Operating** | | | | | | |
| Current Level Expenditures | $27.1 | $28.2 | $29.6 | $31.0 | $32.6 | $148.5 |
| Expansion Expenditures | 1.7 | 2.1 | 3.7 | 4.3 | 6.1 | 17.9 |
| Revenue Gap | 0 | 0 | 2.1 | 3.3 | 5.8 | 11.2 |
| TOTAL GAP | $0 | $0 | $4.8 | $7.3 | $9.5 | $21.6 |

**Assumptions:**

- 5% annual growth in current level operating expenditures
- 3% annual growth in revenues
- no additional federal or state operating assistance
- 2% annual budgetary savings

# City of Charlotte
# Budget and Evaluation
## MEMORANDUM

**To:** City Council Budget Committee
Al Rousso, Chair
Lynn Wheeler, Vice Chair
Charles Baker
Don Reid
Sara Spencer
Ella Scarborough

**From:** Curt Walton, Budget Director

**Date:** April 23, 1997

**Subject:** May 5th Budget Committee

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The Budget Committee meeting scheduled for May 5 at 3 30 p m **has been canceled** The Budget Committee has been very helpful in helping staff shape the agenda and the materials for the next budget retreat, however, since the next budget retreat is May 6, Council will have already received the agenda and the information for that retreat Any material we would present on May 5 would again be presented the next day

The next Budget Committee meeting will be held on Monday, **June 2** at 3 30 p m

c City Council
Pam Syfert
Del Borgsdorf
Vi Alexander Lyles
Julie Burch
Richard Martin
Darlene Schrum

**Mayor**
Patrick McCrory

**Mayor Pro Tem**
Al Rousso

**City Council**
Charles Baker
Patrick D Cannon
Malachi Greene
Michael J Jackson
Nasif Rashad Majeed
Don D Reid
Ella Butler Scarborough
Tim Sellers
Sara Spencer
Lynn Wheeler

**City Manager**
Pamela A Syfert

CHARLOTTE.

Competition

# Competition Companion Document

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**Appendix B**
- FY95-97 Competition Results 25

# Introduction

This competition report serves as a companion document and is part of the development and review process for the FY98-FY99 Budget

The document is divided into three sections

I Privatization / Competition
II Asset Management
III Appendices

The first two sections review briefly the accomplishments over the last three years, and highlight the future work plans in the respective areas The Appendix includes a copy of the Five Year Competition Plan for each Key Business Unit for FY98-FY2002 and the FY95-FY97 Competition Results report for each KBU

If you have questions or comments concerning these materials, please call Doug Bean 391-5073 or Ed Sizer 336-3862

# Privatization/Competition Background

The City of Charlotte Privatization / Competition program began with the presentation of the final report from the Mayor's Privatization Task Force in June, 1993 That report concluded, " we view privatization as one means for governments to reduce costs and increase revenues, and we believe this possible for the City of Charlotte We are convinced that the City of Charlotte will benefit greatly if it embarks upon a comprehensive program of privatization "

In the course of implementing these recommendations, some notable benchmark dates were reached, including

| | |
|---|---|
| Established the Citizen's Privatization and Competition Advisory Committee | November, 1993 |
| Adopted City Council Guidelines for Privatization and Competition | July, 1994 |
| Developed Three-Year Competition Plans for each Key Business | December, 1994 |

During the three fiscal years since the inception of the program, significant achievements have been reached in both the privatization/competition area and in the asset management area

- 27 different services with value of $10 6 million were outsourced to the private sector
- 34 services were competed with a value of $8 6 million, 24 were awarded to the City, 10 were awarded to the private sector
- $3 7 million in recurring savings were realized from outsourcing and competition
- 108 positions were reduced
- 125 parcels were disposed of and $13 million in revenue was received

# Competition Highlights FY95-FY97

During the past three years, 34 services have undergone the competition process Over this time period, $1 7 million of savings have been documented Of the 34 competitions, 24 were awarded to City departments and 10 were awarded to the private sector The chart below summarizes competition efforts by Key Businesses to date that show savings realized through this process

| Key Business | Service Description | Public/ Private | Savings |
|---|---|---|---|
| Business Support Services | Public Safety Radio Installation | Private | $19,000 |
| CMUD | Residuals Land Application | Private | $164,300 |
| | Vest Treatment Plant | Public | $193,993 |
| | Irwin Treatment Plant | Public | $796,858 |
| | Sewer ROW Clearing and Maintenance | Public | $19,040 |
| | Soil and Materials Testing | Public | $1,000 |
| | Residuals Compost and Management Facility | Public | $186,000 |
| Dept of Transportation | STS Services | Public | $180,000 |

| | | | |
|---|---|---|---|
| Engineering and Property Management | Vacant Lot Mowing and Grounds Maintenance | Private | $96,675 |
| | Center City Grounds maintenance | Private | $7,668 |
| | ROW Mowing | Private | $20,814 |
| | Painting | Public | $7,638 |
| | Small Building Construction | Public | $4,536 |
| | | **Public** | **1,389,065** |
| | | **Private** | **$308,457** |
| | | **TOTAL** | **$1,697,522** |

| | | |
|---|---|---|
| **GRAND TOTAL SAVINGS** | **OUTSOURCING** | **$1,969,177** |
| | **COMPETITION** | **$1,697,522** |
| | **TOTAL SAVINGS** | **$3,666,699** |

Case Study Plant Operation

Charlotte opened the operation and maintenance of a water plant and a wastewater plant to competitive bidding with the private sector CMUD staff submitted the low bid for the two plants against some of the largest national and international firms in the world The result is a 22% reduction in costs, a 45% reduction in personnel, and a savings of over $4 million over five years

Case Study Signal Maintenance

The Department of Transportation staff analyzed and reengineered the annual maintenance process and replacement of bulbs in the City's traffic signals In competition with the private sector, their bid for the work was less that one-half the lowest other bid They then performed the work for over $8,000 less than their bid

# Privatization/Competition Plans FY98-FY02

Competition Plans have been developed by each Key Business for FY98-FY2002 The chart below shows a brief summary of privatization / competition activity planned over the next five years - 132 services are anticipated to be put out for competitive bid or outsourcing, at a total dollar value of $39 6 million

| Key Business | Number of Services | $ Value |
|---|---|---|
| Engineering and Property Management | 38 | $2,334,000 |
| Finance | 13 | $1,812,757 |
| Fire | 2 | $665,482 |
| Human Resources | 3 | $34,500 |
| Police | 12 | $2,506,679 |
| Solid Waste Services | 9 | $7,703,457 |
| Transportation | 36 | $1,909,500 |
| CMUD | 18 | $15,597,350 |
| Business Support Services | 1 | $7,000,000 |
| **TOTAL** | **132** | **$39,563,725** |

# Asset Management Background

In the past two years, the City's Asset Management program has been working toward two goals

(1) Maximize the use of needed City properties
(2) Sell all other City-owned parcels not needed for City business

To date, 125 parcels have been sold or transferred to private ownership The City has received $13 million in revenues for the Capital Reserve Fund

Some of the highlights from asset sales include

$ 8 0 million from the sale of the Apparel Mart Parking Deck

$ 2 1 million from the sale of Coliseum Tract I

$ 1 0 million from sale of Monroe Road land

$1 7 million from surplus NFL land sold to Duke Power

# Asset Management Highlights FY95-FY97

- Sold / transferred ownership of 125 parcels

- Realized more than $13 million in revenue which has been dedicated to the capital program

- Negotiated 11 antenna leases, realized nearly $150,000 per year of new revenue from the leases

- Reviewed 8 of 29 City-owned parcels with value of $5 million or more, with the following results

  City Cemeteries City Council decided to retain ownership of City Cemeteries and increase fees

  CMUD plant facilities City will continue to own the facilities due to legal and regulatory environments

  Old Convention Center Property has been approved for sale and a broker has been hired who is marketing the property

- Currently working with Michael Jordan Golf Association to negotiate long term lease of 27 acres of vacant city property near Renaissance Park

- Marketing surplus property at Cedar and Fourth Streets

# Asset Management Highlights
# FY98-FY99 Initiatives

- Study at least 4 additional City properties valued at $5 million or greater for possible disposition
- Continue working with Key Business Units to identify additional surplus City property to sell
- Encourage leasing city properties to generate additional revenue
- Maintain a current inventory of City-owned land, evaluate all properties for maximum value/use

# APPENDIX A

FIVE YEAR

SERVICES COMPETITION

AND

CONTRACTING PLANS

# UTILITIES
## SERVICES COMPETITION & CONTRACTING PLAN
## FY 1998-2002

| SERVICE | COMP/CONT | # POS | 1998 | 1999 | 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|
| Hydrant Maintenance | COMP | 8 | $478,000 | | | | |
| Meter Maintenance | COMP | 4 5/4 5 | $126,000 | | $126 000 | | |
| TVing Sewer Lines | COMP | 3 | $180,000 | | | | |
| Laboratory Services | COMP | 13 | $775,000 | | | | |
| Instrumentation Maintenance | CONT | 2 | $111,600 | | | | |
| | | | | | | | |
| Routine Water Main Repairs | COMP | 5 | | $128,000 | | | |
| Soils and Materials Testing | COMP | 5 | | $192,750 | | | |
| Lateral Installation and Replacement | COMP | 10 | | $600,000 | | | |
| McAlpine Creek Wastewater Mgt Facility | COMP | 24 | | $5,144,000 | | | |
| Meter Reading | COMP | 5 | | $198,000 | | | |
| | | | | | | | |
| Water Locates | COMP | 3 | | | $160,000 | | |
| | | | | | | | |
| Irwin Creek Wastewater Treatment Facility | COMP | 10 5 | | | | $1,565,000 | |
| Sugar Creek Wastewater Treatment Facility | COMP | 16 | | | | $1,941,000 | |
| Residuals Land Application | COMP | 0 | | | | $680 000 | |
| Residuals Compost Mgt Facility | COMP | 4 | | | | $1,300,000 | |
| | | | | | | | |
| Vest Water Treatment Plant | COMP | 7 5 | | | | | $912 000 |
| North Meck Water Treatment Plant | COMP | 10 | | | | | $980,000 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Costs shown under fiscal years should indicate annualized budget amount | | | | | | | |
| of the service in the year in which the competition or contracting will take place | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| TOTAL | | 127 | $1,670,600 | $6,262,750 | $286,000 | $5,486,000 | $1,892,000 |

# TRANSPORTATION
# SERVICES COMPETITION & CONTRACTING PLAN*
# FY 1998-2002

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| SERVICE | COMP/CONT | # P Yrs | 1998 | 1999 | 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| Storm Drainage Repair and Construction | COMP | | $125,000 | | | $125,000 | |
| Pipe and catch basin construction | | | | | | | |
| Street Repair Asphalt | COMP | | $50,000 | | | $125,000 | |
| Base repair, etc | | | | | | | |
| New Signal Installation | COMP | | $30,000 | $30,000 | | $30,000 | |
| Pavem't Marking Thermoplastic | COMP | | $30,000 | $30,000 | | $30,000 | $30,000 |
| Pavem't Marking Intersection | COMP | | $2,500 | | $2,500 | | |
| Sign Installation | COMP | | $12,500 | | $1,000 | | $1,000 |
| Sign Fabrication | COMP | | $2,500 | $2,500 | | $2,500 | |
| Pavem't Marking Tape | COMP | | $25,000 | | $25,000 | | |
| Storm Drainage Cleaning & Repair | COMP | | | $125,000 | | | $125,000 |
| Pipe & catch basin clean'g & repair grate/frame adjustm't | | | | | | | |
| Sidewalk Repair (Concrete) | COMP | | | $125,000 | | | $125,000 |
| Constr'n & repair of sidewalk | | | | | | | |
| Street Reconstruction | COMP | | | $125,000 | | | $125,000 |
| Gravel str reconstr'n & widening, etc | | | | | | | |
| Signal Loop Installation | COMP | | | $12,500 | | $12,500 | |
| Curb, Gutter & Utility Repair (Concrete) | COMP | | | | $125,000 | | |
| Constr'n & repair of curb, gutter, street | | | | | | | |
| Street Repair Asphalt | COMP | | | | $125,000 | | $125,000 |
| Patching rolled curb, etc | | | | | | | |
| Signal Maintenance | COMP | | | | $20,000 | | $20 000 |
| Signal Interconnect Cable | COMP | | | | $5,000 | | |
| Pavem't Marking Paint | COMP | | | | $2,500 | | |
| | | | | | | | |
| TOTAL | | | $277,500 | $450,000 | $306,000 | $325,000 | $551,000 |

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*Dollar volume for construction limited by State statute, represents larger volume of work to be out-sourced each year for which CDOT cnanot compete

# SOLID WASTE SERVICES
## SERVICES COMPETITION & CONTRACTING PLAN
## FY 1998-2002

| SERVICE | COMP/CONT | # POS | 1998 | 1999 | 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|
| Residential Solid Waste Collection (West Qtr)* | COMP | 41 | $1,905,347 | | | | |
| Rollout Cart Delivery (includes 2 temp positions) | COMP | 2 25 | $64,447 | | | | |
| Dead Animal Collection | COMP | 1 55 | $60,781 | | | | |
| Business Garbage (includes 2 temp positions) | COMP | 9 7 | | $431,187 | | | |
| Special Events Cleaning Services | COMP | 0 35 | | $127,834 | | | |
| Central Business District Maintenance | COMP | 11 | | | $488 309 | | |
| Right-of-Way Cleaning Services | COMP | 25 75 | | | $1 043 300 | | |
| Street Sweeping/Flushing | COMP | 15 4 | | | | $982 158 | |
| Residential Solid Waste Collection (South Qtr)** | COMP | 0 | | | | $2 600 094 | |
| Residential Solid Waste Collection (North Qtr) | TBD | | | | | | |
| Residential Solid Waste Collection (East Qtr) | TBD | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| * Reflects total cost bid by SWS | | | | | | | |
| **Privatized - service provided by BFI since October 1995 | | | | | | | |
| All other costs are based on operating budget costs only with a 3% increase each year after 1999 | | | | | | | |
| Positions include Divisional overhead positions | | | | | | | |
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| Costs shown under fiscal years should indicate annualized budget amount | | | | | | | |
| of the service in the year in which the competition or contracting will take place | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| sw98 02 | | | | | | | |
| TOTAL | | 107 | $2,030,575 | $559,021 | $1,531,609 | $3,582 252 | $0 |

| POLICE | | | | | | | |
|---|---|---|---|---|---|---|---|
| SERVICES COMPETITION AND CONTRATING PLAN | | | | | | | |
| FY 1998-2002 | | | | | | | |
| **SERVICE** | **COMP/CONT** | **#POS** | **1998** | **1999** | **2000** | **2001** | **2002** |
| Funeral Escorts | TBD | N/A | $64,327 | | | | |
| On-Street Parking Enforcement | CONT | 2 | $50,778 | | | | |
| Facilities Management | COMP | 2 | $833,369 | | | | |
| Courier Service for City Finance | CONT | 1 | $32 019 | | | | |
| Mail Courier Service | CONT | 0 | $125 268 | | | | |
| | | | | | | | |
| | | | | | | | |
| Taxi Cab Permits & Inspections | CONT | 2 | | $70,656 | | | |
| Secondary Employment | CONT | 1 | | $48,362 | | | |
| Helicopter Services & Maintenance | COMP | 4 | | $337,953 | | | |
| | | | | | | | |
| | | | | | | | |
| Recruit Background Investigations | CONT | 3 | | | $130 121 | | |
| Polygraph Unit | COMP | 3 | | | $150,026 | | |
| | | | | | | | |
| | | | | | | | |
| Administrative Services (Payroll) | CONT | 1 | | | | $31 028 | |
| | | | | | | | |
| | | | | | | | |
| Radio Services | CONT | 1 | | | | | $632 772 |
| | | | | | | | |
| | | | | | | | |
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| | | | | | | | |
| TOTAL | | 20 | $1,105,761 | $456,971 | $280,147 | $31,028 | $632,772 |

# HUMAN RESOURCES

## SERVICES COMPETITION & CONTRACTING PLAN

## FY 1998-2002

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| SERVICE | COMP/CONT | # POS | 1998 | 1999 | 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|
| Flexible Benefits Administration | COMP | .20 | 8 000 | | | | |
| Unemployment Compensation Program Mgmt | COMP | 10 | | 6,500 | | | |
| Retirement Counseling | COMP | 40 | | 20 000 | | | |
| TOTAL | | 70 | 8,000 | 26,500 | | | |

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# FIRE DEPT.

## SERVICES COMPETITION & CONTRACTING PLAN

## FY 1998-2002

| SERVICE | COMP/CONT | # POS | 1998 | 1999 | 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|
| Fire Garage | Comp | 8 | $573,482 | | | | |
| Fire Logistics | Comp | 2.5 | $92,000 | | | | |
| TOTAL | | 10 5 | $665,482 | | | | |

# FINANCE
# SERVICES COMPETITION & CONTRACTING PLAN
# FY 1998-2002

| SERVICE | COMP/CONT | #POS | 1998 | 1999 | 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|
| Cash Management | COMP | 1 3 | $112,704 | | | | |
| Safety Program | COMP | 2 0 | 104,335 | | | | |
| Automobile/General Liability Claims | COMP | 3 0 | 117,833 | | | | |
| Workers Compensation Claims | COMP | 3 5 | 147,355 | | | | |
| Accounts Receivable Loans | COMP | 1 8 | 96,404 | | | | |
| Accounts Receivable - Misc | COMP | 1 8 | 95,849 | | | | |
| Remittance Processing Utility Mail | COMP | 1 5 | 149 000 | | | | |
| Comprehensive Annual Financial Report Preparation | COMP | 1 0 | | $53,103 | | | |
| Financial Systems Maintenance and Coordination | COMP | 1 0 | | | $75 000 | | |
| Quality/Team Processes - Review | COMP | 2 0 | | | | $120,000 | |
| Industrial Hygiene - Review | COMP | 1 0 | | | | $49 895 | |
| Financial/Economic Forecasts | COMP | 1 0 | | | | | $60,279 |
| Utility Mail Insertion Review | COMP | 1 0 | | | | | $631 000 |
| **TOTALS** | | **21.9** | **$823,480** | **$53,103** | **$75,000** | **$169,895** | **$691,279** |

# SERVICES COMPETITION & CONTRACTING PLAN
## FY 1998-2002

| SERVICE | COMP/CONT | | # POS | 1998 | 1999 | 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|---|
| CMGC Mail Room & Courier Service (Bldg Services Div ) | COMP | | 4 | $104 000 | | | | |
| CMGC Management/Administration (Bldg Services Div ) | COMP | | 4 | $200 000 | | | | |
| CMGC Mechanical/HVAC Maintenance (Bldg Services Div ) | COMP | | 6 | $275 000 | | | | |
| City Right of Way Mowing District #5 (3 Year Contract) | COMP | | 0 75 | $45 000 | | | | |
| City Right of Way Mowing District #6 (3 Year Contract) | COMP | | 0 75 | $45,000 | | | | |
| Grounds Maintenance Phase III (3 Year Contract) | COMP | | 2 | $125 000 | | | | |
| North East & West Districts Median Maint & Landscaping | COMP | | 2 | $100,000 | | | | |
| Fire Station Kitchen Renovations (Bldg Maint ) | COMP | x | 0 | $25 000 | | | | |
| Belmont Center Painting (Interior) (Bldg Maint ) | COMP | x | 0 | $15 000 | | | | |
| Belmont Center HVAC Replacemt (Childcare area)(Bldg Maint | COMP | x | 0 | $5 000 | | | | |
| Backflow Installations (8 locations) (Bldg Maint ) | COMP | x | 0 | $15 000 | | | | |
| | | | | | | | | |
| City Right of Way Mowing District #1 (3 Year Contract) | COMP | | 0 75 | | $45 000 | | | |
| City Right of Way Mowing District #4 (3 Year Contract) | COMP | | 0 75 | | $45 000 | | | |
| CMGC Parking Deck Management (Bldg Services Div ) | COMP | | 4 | | $160 000 | | | |
| Grounds Maintenance-Phase I (3 Year Contract) | COMP | xx | 2 | | $168 000 | | | |
| Mint Museum Grounds Maintenance (3 Year Contract) | COMP | xx | 0 5 | | $16 000 | | | |
| Discovery Place Restroom Renovations (Bldg Maint ) | COMP | x | 0 | | $40 000 | | | |
| Amy James Center Painting (Interior) (Bldg Maint ) | COMP | x | 0 | | $8 000 | | | |
| Fire Station #16 HVAC Replacemt (Kitchen Side)(Bldg Maint ) | COMP | x | 0 | | $5 000 | | | |
| Backflow Installations (8 locations) (Bldg Maint ) | COMP | x | 0 | | $15 000 | | | |
| | | | | | | | | |
| City Right of Way Mowing - District #2 (3 Year Contract) | COMP | | 0 75 | | | $45 000 | | |
| City Right of Way Mowing District #3 (3 Year Contract) | COMP | | 0 75 | | | $45 000 | | |
| Cultural Arts Facilities Grounds Maintenance (3 Yr Contract) | COMP | | 0 5 | | | $23 000 | | |
| Grounds Maintenance Phase II (3 Year Contract) | COMP | xx | 2 | | | $130 000 | | |
| Fire Station Kitchen Renovations (Bldg Maint ) | COMP | x | 0 | | | $25 000 | | |
| Backflow Installations (8 locations) (Bldg Maint ) | COMP | x | 0 | | | $15 000 | | |
| Sweden Rd HVAC Replacemt (Bldg Maint ) | COMP | x | 0 | | | $45 000 | | |

# SERVICES COMPETITION & CONTRACTING PLAN
## FY 1998-2002

| SERVICE | COMP/CONT | | # POS | 1998 | 1999 | 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
| City Right of Way Mowing District #5 (3 Year Contract) | COMP | | 0 75 | | | | $45 000 | |
| City Right of Way Mowing - District #6 (3 Year Contract) | COMP | | 0 75 | | | | $45 000 | |
| Grounds Maintenance Phase III (3 Year Contract) | COMP | | 2 | | | | $125 000 | |
| Backflow Installations (8 locations) (Bldg Maint ) | COMP | x | 0 | | | | $15 000 | |
| | | | | | | | | |
| City Right of Way Mowing District #1 (3 Year Contract) | COMP | | 0 75 | | | | | $45 000 |
| City Right of Way Mowing District #4 (3 Year Contract) | COMP | | 0 75 | | | | | $45 000 |
| Fire Station Kitchen Renovations (Bldg Maint ) | COMP | x | 0 | | | | | $25 000 |
| Grounds Maintenance Phase I (3 Year Contract) | COMP | xx | 2 | | | | | $168 000 |
| Mint Museum Grounds Maintenance (3 Year Contract) | COMP | xx | 0 5 | | | | | $16,000 |
| Evergreen Cemetery Admin Bldg HVAC Replacemt (Bld Mt ) | COMP | x | 0 | | | | | $6 000 |
| Backflow Installations (8 locations) (Bldg Maint ) | COMP | x | 0 | | | | | $15 000 |
| **TOTAL** | | | **39** | **$954,000** | **$502,000** | **$328,000** | **$230,000** | **$320,000** |

**NOTES.**

**(X)**

These projects are small, short-term projects lasting from one week to three months in duration As a result the number of positions required to carry out the project is not reflected Costs are not annualized

**(XX)**

Competition on these projects is dependent on the results of preceding competitions If previous competitions were unsuccessful staff and equipment may have to be added in order for the City to compete

File Name A \5YRCTRPN2 (DISK CPFORMATS 1997)

Prepared by C R Smyre

03/18/97

FORM C

# BUSINESS SUPPORT SERVICES
## SERVICES COMPETITION AND CONTRACTING PLAN
## FY 1998-2002

| SERVICE | COMP/CONT | # POS | 1998 | 1999 | 2000 | 2001 | 2002 |
|---|---|---|---|---|---|---|---|
| Fleet Vehicle Maintenance (all) | COMP | 77 | $7 000 000 | | | | |
| Technology Services (selected) | CONT/COMP | TBD | TBD | | | | |
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| | | | | | | | |
| TOTAL | | 77 | $7,000,000 | | | | |

# APPENDIX B

SUMMARY OF

PRIVATIZATION / CONTRACTING

RESULTS: FY95-FY97

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# UTILITIES
## RESULTS OF SERVICES COMPETITION & CONTRACTING
FY 1995-1997

| SERVICE | COMP/CONT | PVT/PUB | # POS | FY 95 | FY 96 | FY 97 | SAVINGS |
|---|---|---|---|---|---|---|---|
| Odor Control | CONT | PVT | 1 | $125,000 | | | $225,000 |
| Grounds Maintenance | CONT | PVT | 3 | $99,590 | | | $39,353 |
| Janitorial Services | CONT | PVT | 3 | $66,708 | | | $34 318 |
| | | | | | | | |
| Irwin Creek Wastewater Treatment Plant | COMP | PUB | 25 | | $1 062 352 | | $796 858 |
| Residuals Land Application | COMP | PVT | 0 | | $680,000 | | $164 300 |
| Residuals Compost Management Facility | COMP | PUB | 6 | | $1,300,000 | | $186 000 |
| Vest Water Treatment Plant | COMP | PUB | 14 | | $521,327 | | $193 993 |
| Water Locates | COMP | PUB | 3 | | $163,390 | | $0 |
| Soils and Materials Testing | COMP | PUB | 5 | | $192,750 | | $1 000 |
| Right of Way Clearing | COMP | PUB | 5 | | $20 276 | | $19 040 |
| Instrumentation Maintenance | CONT | PVT | 2 | | $111 600 | | N/A |
| | | | | | | | |
| Lift Station Maintenance | COMP | TBD | 9 | | | $665 000 | N/A |
| Meter Reading (28% residential route sets) | COMP | TBD | 5 | | | $198,000 | N/A |
| Sewer Cleaning | COMP | TBD | 10 | | | $500,000 | N/A |
| Service Renewals | COMP | TBD | 5 | | | $450,000 | N/A |
| Odor Control | CONT | TBD | 0 | | | $125,000 | N/A |
| | | | | | | | |
| * All costs are annualized | | | | | | | |
| *Services are listed in the year contracted/competed | | | | | | | |
| | | | | | | | |
| **TOTAL** | | | 96 | $291,298 | $4,051,695 | $1,938,000 | $1,659,862 |

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# TRANSPORTATION
## RESULTS OF SERVICES COMPETITION AND CONTRACTING
## FY 1995-1997

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10-Apr 97

| SERVICE | COMP/CONT | PVT/PUB | # P Yrs | FY95 | FY96 | FY97 | SAVINGS |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| STS NIGHT/WKEND/HOL SERVICE (3 YEAR) | COMP | PUB | 14 | $270 000 | | | $100,000 |
| TRAFFIC SIGNAL BULB MAINTENANCE | COMP | PUB | 0 4 | | $48,982 | | |
| STREET RECONST , ANNEX'N, FY94 | COMP | PUB | 1 7 | | $89,143 | | |
| ASPHALT BASE REPAIR | COMP | PUB | 0 9 | | $91,720 | | |
| STS SERVICE (3 YEAR) | COMP | PUB | 65 | | | $2,500,000 | $80 000 |
| SANITATION PARKING LOT | COMP | PUB | 0 1 | | | $27,705 | |
| | | | | | | | |
| TOTAL | | | 82 1 | $270,000 | $229,845 | $2,527 705 | $180,000 |

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# SOLID WASTE SERVICES

## RESULTS OF SERVICES COMPETITION & CONTRACTING

FY 1995-1997

| SERVICE | COMP/CONT | PVT/PUB | # POS | FY 95 | FY 96 | FY 97 | SAVINGS |
|---|---|---|---|---|---|---|---|
| Residential Solid Waste Collection (South Qtr) | CONT | PVT | 42 | | $2 455 354 | | $510 474 |
| * All costs are annualized | | | | | | | |
| *Services are listed in the year contracted/competed | | | | | | | |
| sw95 97 | | | | | | | |
| TOTAL | | | 42 | $0 | $2,455,354 | $0 | $510 474 |



03/19/97

| POLICE | | | | | | | |
|---|---|---|---|---|---|---|---|
| RESULTS OF SERVICES COMPETITION & CONTRACTING | | | | | | | |
| FY 1995-1997 | | | | | | | |
| | | | | | | | |
| SERVICE | COMP/CONT | PVT/PUB | #POS | FY 95 | FY 96 | FY 97 | SAVINGS |
| | | | | | | | |
| Physical Fitness Program | CONT | PVT | 1 | $39,930 | | | $6,750 |
| *Police Counselor* | ELIMINATE | PVT | 1 | $48 295 | | | $31,439 |
| Sergeants Promotional Process | CONT | PVT | 0 | $38,000 | | | $38,000 |
| Noise Control Ordinance Enforcement | ELIMINATE | PUB | 1 | $24 181 | | | $24 181 |
| | | | | | | | |
| | | | | | | | |
| Alarm Ordinance Enforcement | CONT | PVT | 0 | | $456,000* | | $0 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| *Custodial Services* | CONT | PVT | 9 | | | $317,460 | $91 716 |
| School Crossing Guards | CONT | TBD | 1 full 92 PT | | | $245,463 | N/A |
| Animal Shelter Licensing & Records Mgt | CONT | TBD | 12 5 | | | $321 851 | N/A |
| | | | | | | | |
| | | | | | | | |
| * - This was a new program Decision was made not to provide resources in-house but to contract the services out | | | | | | | |
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| | | | | | | | |
| TOTAL | | | 25 full time | $150 406 | $456 000* | $884 774 | $192 086 |
| | | | 93 part time | | | | |

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# PLANNING

## RESULTS OF SERVICES COMPETITION & CONTRACTING

FY 1995-1997

| SERVICE | COMP/CONT | PVT/PUB | # POS | FY 95 | FY 96 | FY 97 | SAVINGS |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| Graphic Services (City's FOCUS Area, City Serv | CONT | PVT | 1 | | $22 376 | | $4 100 |
| Day, Neighborhood Action Plans, CWAC Five | | | | | | | |
| Year Strategic Plan, District Plans, 2015 Plan | | | | | | | |
| & Corridor Land Use Maps | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Mapping (Zoning Map Updates) | CONT | PVT | 1 | | $24,750 | | $0 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| TOTAL | | | 2 | | $47,126 | | $4 100 |
| | | | | | | | |
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| | | | | | | | |
| Note Improved technology/computer abilities of current staff has allowed the department to produce more graphic services in-house | | | | | | | |
| | | | | | | | |
| | | | | | | | |

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# FINANCE
# RESULTS OF SERVICES COMPETITION & CONTRACTING
# FY 1995-1997

| SERVICE | COMP/CONT | PVT/PUB | #POS | FY95 | FY96 | FY97 | SAVINGS |
|---|---|---|---|---|---|---|---|
| Quality/Teamwork Program | RFI | PUB | 1 0 | | $72,000 | | |
| Industrial Hygiene | COMP | PUB | 1 0 | | 49,895 | | |
| Bad Debt Collection | CONT | PVT | 1 0 | | 34,272 | | * |
| Utility Bill Insertion | COMP | TBA | 1 0 | | | $631 000 | |
| **TOTALS** | | | **4.0** | | **$167,167** | **$631,000** | |

* Privatization of this service has resulted in additional revenues to the City

ENGINEERING AND PRC RTY MANAGEMENT DEPARTMENT

# RESULTS OF SERVICES COMPETITION & CONTRACTING
## FY 1995-1997

| SERVICE: | | COMP/CONT | PVT/PUB | # POS. | | $FY-95 | $FY-96 | $FY-97 | SAVINGS |
|---|---|---|---|---|---|---|---|---|---|
| Painting-Fire Station #4 | | COMP | PUB | 0 | X | $5 162 | | | $7 638 |
| HVAC Installation-Radio Tower Building | | COMP | PUB | 0 | X | $9 220 | | | $0 |
| Electrical Installation-Radio Tower Building | | COMP | PUB | 0 | X | $16 775 | | | $0 |
| Painting-Two Fire Stations (#'S 9 & 26) | | COMP | PUB | 0 | X | $3 938 | | | $0 |
| Building Construction-Broom Building | | COMP | PUB | 0 | X | $27 359 | | | $4 536 |
| Systematic Tree Pruning (Portion) | (Footnote #1) | COMP | PVT | 0 | X | $35 200 | | | $0 |
| Map Room Operations | (Footnote #2) | NA | PUB | 2 | | $0 | | | $44 896 |
| Materials Testing | (Footnote #3) | CONT | PVT | 2 | | $52 202 | | | $0 |
| | | | | | | | | | |
| City Property-Vacant Lot Mowing | | COMP | PVT | 1 | | | $16 000 | | $5 152 |
| City Shoulder Right of Way Mowing (2 Districts) | | COMP | PUB | 2 | | | $56 016 | | $0 |
| Grounds Maintenance-Center City Locations | (Footnote #4) | COMP | PVT | 3 | | | $168 300 | | $7 668 |
| Kitchen Renovations-Fire Stations #3 & #14 | | COMP | PUB | 0 | X | | $31 465 | | $0 |
| | | | | | | | | | |
| Grounds Maintenance-Various Locations | (Footnote #4) | COMP | PVT | 3 | | | | $95 109 | $47 524 |
| Grounds Maintenance-PFA & Adam Ser Bureau | (Footnote #4) | COMP | PVT | 3 | | | | $47 481 | $43 999 |
| City Right of Way Mowing-District #2 | (Footnote #4 | COMP | PVT | 0 75 | | | | $28 096 | $8 692 |
| City Right of Way Mowing-District #3 | (Footnote #4 | COMP | PVT | 0 75 | | | | $26 200 | $12 122 |
| | | | | | | | | | |
| TOTAL | | | | 17.5 | | $149 856 | $271 781 | $196 886 | $182 227 |

**FOOTNOTES·**

1 ) City low bidder-awarded to private firm to benchmark costs This activity now contracted completely with private sector
2 ) City no longer provides this service-now being provided by Mecklenburg County
3 ) Service privatized
4 ) These are 3-Year Contracts Cost/Savings shown are annualized

**GENERAL NOTES:**

1 The Engineering and Property Management Department has an ongoing practice of benchmarking all of it s operational and professional services with private sector service providers
2 Services are listed in the fiscal-year contracted/competed
3 (x) A number of services listed reflect no positions associated with the costs The nature of our work particularly Building Maintenance services are projects lasting from one week to approximately three months Costs identified are only project costs and savings and are not annualized

Prepared by C R Smyre

File A \957 CMHIS WK4 (D sk CPF 2/2/97)

FORM A

# BUSINESS SUPPORT SERVICES
## RESULTS OF COMPETITION AND CONTRACTING
## FY 1995-1997

| SERVICE | COMP/CONT | PVT/PUB | # POS | FY95 | FY96 | FY97 | ANNUAL SAVINGS |
|---|---|---|---|---|---|---|---|
| Transit Imprest Account Audit | BENCHMARK | PUB | | $3 000 | | | |
| MWBD Firm Certification | CONT | PVT | | $90 000 | | | |
| MWBD Firm Educational Services | CONT | PVT | | $10 000 | | | |
| Material Mgmt Distribution Center | CONT | PVT | 4 | $1 366 000 | | | $166 000 |
| Mainframe Computer Operations | CONT | COUNTY | 7 | $1 144 000 | | | $105 000 |
| Computer Classroom Training | CONT | PVT | | $43 000 | | | |
| Fleet Fueling Services | CONT | PVT | | | $1 900 000 | | $49 000 |
| Fleet Accident Repair Program | CONT | PVT | 1 | | $320 000 | | $40 000 |
| Radio Install/Remove Public Safety Vehicles | COMP | PVT | 1 | | $54 000 | | $19 000 |
| Print/Copier Operations | CONT | PVT | 4 | | $758 000 | | $92 000 |
| Telephone Installation and Repair | COMP | PUB | 1 | | $104 000 | | |
| Radio Install/Remove-Non Public Safety Vehicles | CONT | PVT | | | | $30 000 | |
| Telephone Installation and Repair | CONT | PVT | 1 | | | $104 000 | |
| | | | | | | | |
| TOTAL | | | 19 | $2 656 000 | $3 136,000 | $134,000 | $471 000 |

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# RESULTS OF SERVICES COMPETITION & CONTRACTING

FY 1995-1997

| SERVICE | COMP/CONT | PVT/PUB | #POS | FY 95 | FY 96 | FY 97 | SAVINGS |
|---|---|---|---|---|---|---|---|
| Political Consolidation | Contract | Private | 0 | $22,000 | $17 000 | | N/A |
| City Council Agenda Format & Production | Contract | Private | 0 | $1,200 | | | N/A |
| Evaluation of the Community Safety Plan | Contract | Public | 0 | $58,000 | | | N/A |
| Activity Based Management | Contract | Private | 0 | | $16,000 | | N/A |
| User Fee Pricing Study | Contract | Private | 0 | | $38 000 | | N/A |
| Fire Department Organizational Study | Contact | Private | 0 | | $84,000 | | |
| Citizen Survey | Contract | Public | 0 | | $8 000 | | N/A |
| Balanced Scorecard | Contract | Private | 0 | | | $99 000 | N/A |
| TOTAL | | | | $81 200 | $163,000 | $99,000 | N/A |

# AVIATION
## RESULTS OF SERVICES COMPETITION & CONTRACTING
## FY 1995-1997

| SERVICE | COMP/CONT | PVT/PUB | # POS | FY 95 | FY 96 | FY 97 | SAVINGS |
|---|---|---|---|---|---|---|---|
| TERMINAL / JETWAY PAINTING | CONT | PVT | 1 | | $47,000 | | $0 |
| PART 150 BUILDING DEMOLITION | CONT | PVT | 1 | | $30,000 | | $0 |
| MOWING / LANDSCAPING MAINTENANCE | CONT | PVT | 2 5 | | $67,000 | | $0 |
| IRRIGATION REPAIRS | CONT | PVT | 0 5 | | $16,033 | | $0 |
| LANDSCAPE BEDDING | CONT | PVT | 1 5 | | $34,000 | | $0 |
| TREE PLANTING | CONT | PVT | 0 5 | | $15,000 | | $0 |
| PERIMETER SECURITY FENCING | CONT | PVT | 0 | | | $60,000 | $0 |
| MISC CIVIL ENGINEERING DESIGN | CONT | PVT | 0 | | | $200,000 | $0 |
| TOTAL | | | 7 | $0 | $209,033 | $260,000 | $0 |