

**City of Monroe**

**Budget Workshop**

**March 3, 2025**

**City of Monroe  
Council Budget Workshop  
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## Why Do A Reappraisal?

- It is a statutory mandate – NCGS 105-286
  - Octennial Cycle
  - Mandatory Advancement
  - Optional Advancement
- Fairness and Equity
- Provide A Stable Tax Base

## 2025 Reappraisal Cycle Recap

- Last Reappraisal 2021 – 35.6% Total Increase
- BOCC Adopted 4-year cycle in 2021
- NCDOR sent notice in 2022 mandating a 2025 Reappraisal – Sales Ratio 82.03%
- 2024 Final Sales Ratio: 66.87%

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### Progress To Date

114,182 Parcels Completed

60.05% Total Increase

63.45% Residential Increase

45.59% Commercial/Industrial Increase

33.45% Exempt Property Increase

94.71% Rural Land Valuation Increase  
(65% - 70% of value is deferred)

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## Peer County Data: Top Ten By Population

County	2024 Assessed Values	2025 % Increase	2024 % Increase	2023 % Increase	2022 % Increase
Wake	\$ 271,700,000,000	-	51.00%	-	-
Mecklenburg	\$ 258,694,001,170	-	-	53.00%	-
Guilford	\$ 58,652,186,954	-	-	-	35.00%
Buncombe*	\$ 45,249,613,627	60.00%	-	-	-
Durham	\$ 43,237,568,323	75.22%	-	-	-
Cabarrus	\$ 40,784,672,847	-	56.00%	-	-
Forsyth	\$ 36,361,656,934	53.17%	-	-	-
Union	\$ 34,307,865,254	60.05%	-	-	-
Johnston	\$ 22,170,298,359	70.60%	-	-	-
Cumberland	\$ 20,088,700,000	88.00%	-	-	-

\* Buncombe projected a 60% increase in 2025, however, the reappraisal was postponed due to storm damage from Helene

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## Union County Market Data



## Market Characteristics

- Prices still increasing, but stabilized
- December 2024 – Median listing price essentially flat compared to 2023 with a median sales price of \$438,736 and an average sales prices of \$536,591 (Canopy MLS)
- Days on market up to 58 from a low of 9 in April of 2022, rate of transactions are slowing
- Median sales price January 2025 - \$463,485 (Rocket Mortgage)

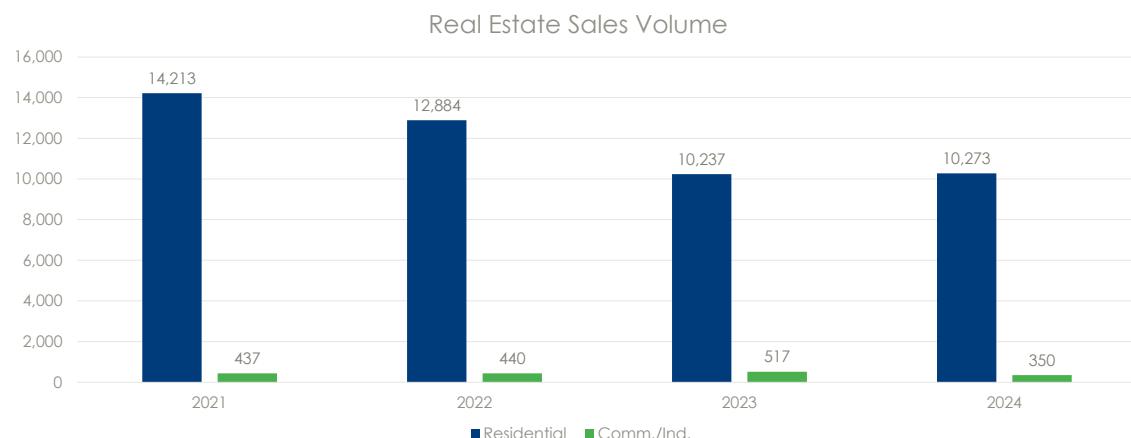
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## Contributing Factors

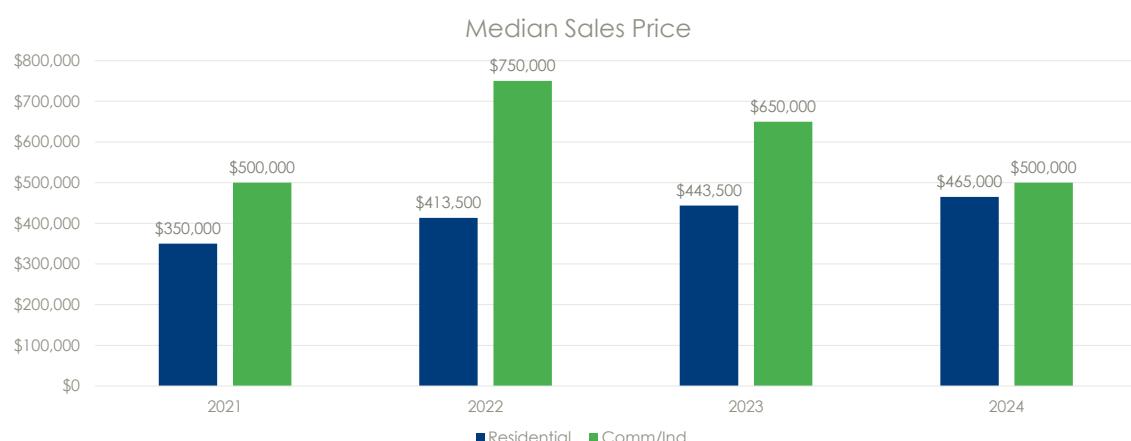
- Charlotte Metro Regional Growth 20% - 2010 – 2024
  - 2016 – 2021: Growth Rate 8.1% (6<sup>th</sup> fastest in the country)
- Union County 3<sup>rd</sup> fastest growing county in the region – Charlotte Regional Business Alliance
  - Projected to pass 300,000 by 2030 and 430,000 by 2050
  - NC OSBM projects 28.5% increase 2020 – 2030 (5<sup>th</sup> highest in NC)
- A Continued, Strong Real Estate Market
- Inflation and the Cost of Construction

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## Sales Volume By Year



## Median Sales Price By Year



## 2025 Valuation Totals



### Countywide Valuation – Market Value

Category	2024 (2021 Values)	2025
Residential/Agricultural	\$ 32,010,679,200	\$ 52,321,954,700
Commercial/Industrial	\$ 3,845,220,400	\$ 5,598,271,200
Exempt	\$ 1,999,802,400	\$ 2,668,803,800
Total Market Value	\$ 37,855,702,000	\$ 60,589,029,700
Rural Land Valuation	\$ 1,358,805,200	\$ 2,645,770,500
Median Home Value	\$ 293,677	\$ 403,000
Median Sales Ratio	66.87%	99.76%

## Municipal Residential Valuation

Municipality	2024 Value (2021 Value)	2025 Value	Change	2024 Median	2025 Median	Median Sqft.	2024 Median Value/Sqft.	2025 Median Value/Sqft.
Marvin	\$1,518,034,600	\$2,551,293,600	68.07%	\$678,200	\$1,121,500	4,271	\$124.11	\$215.42
Monroe	\$2,697,451,500	\$4,432,647,200	64.33%	\$209,500	\$309,500	1,722	\$100.18	\$150.87
Wingate	\$159,075,500	\$272,055,700	71.02%	\$172,600	\$265,150	1,672	\$96.75	\$136.61
Marshville	\$112,048,800	\$180,393,900	61.00%	\$111,000	\$171,400	1,300	\$84.11	\$108.50
Waxhaw	\$2,768,551,200	\$4,467,169,200	61.35%	\$356,700	\$568,600	2,840	\$103.24	\$169.64
Indian Trail	\$4,310,963,400	\$6,908,873,900	60.26%	\$264,200	\$397,000	2,047	\$107.26	\$163.69
Stallings	\$2,014,588,900	\$3,171,328,800	57.42%	\$290,500	\$446,500	2,101	\$107.42	\$176.59
Weddington	\$3,259,238,000	\$5,089,436,400	56.15%	\$553,300	\$891,600	3,743	\$117.26	\$196.58
Fairview	\$636,235,100	\$1,013,044,300	59.22%	\$275,300	\$419,200	2,005	\$100.50	\$141.55
Lake Park	\$332,895,600	\$511,405,500	53.62%	\$257,600	\$382,200	1,811	\$110.18	\$170.04
Hemby Bridge	\$152,228,100	\$248,697,300	63.37%	\$190,100	\$297,800	1,500	\$89.83	\$166.13
Wesley Chapel	\$1,394,324,200	\$2,291,774,900	64.36%	\$396,600	\$650,100	2,949	\$106.26	\$179.65
Unionville	\$826,648,200	\$1,399,352,700	69.28%	\$243,500	\$378,100	1,852	\$104.41	\$168.23
Mineral Springs	\$381,107,700	\$641,810,900	68.41%	\$217,400	\$352,800	1,820	\$96.97	\$167.15

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## Municipal Commercial Valuation

Municipality	2024 (2021) Values	2025 Values	Change
Marvin	\$30,449,600	\$43,429,900	42.63%
Monroe	\$1,552,967,500	\$2,328,853,500	49.96%
Wingate	\$21,405,700	\$27,398,500	28.00%
Marshville	\$64,403,300	\$96,950,400	50.54%
Waxhaw	\$268,131,600	\$366,261,100	36.60%
Indian Trail	\$1,086,698,000	\$1,551,336,700	42.76%
Stallings	\$355,042,300	\$519,427,400	46.30%
Weddington	\$31,519,300	\$34,125,500	32.53%
Fairview	\$8,782,500	\$13,098,500	49.14%
Lake Park	\$16,211,100	\$21,694,200	33.82%
Hemby Bridge	\$8,184,700	\$11,292,900	37.98%
Wesley Chapel	\$78,782,100	\$106,157,200	34.75%
Unionville	\$5,576,600	\$9,865,800	76.91%
Mineral Springs	\$17,197,000	\$21,829,900	26.94%

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## Statistical Quality Control Measures



### Coefficient of Dispersion (COD)

- A statistical measure that indicates the distribution of a data set is relative to its median
- The International Association of Assessing Officers (IAAO) establishes the COD range to be between 5 and 25 depending on property classification and location.
- A **higher COD** means the values are more spread out and less consistent, while a **lower COD** means the values are closer together, indicating more consistency.

	2024	2025
COD*	18.79	8.53

\*COD after removing the outliers using the 1.5 IQR Rule

## Price Related Differential (PRD)

- A statistical measure that indicates how uniform the relationship is between the sales price and the value of the property
- The purpose of this is to compare the assessment levels of lower value property to the assessment levels of higher value properties.
- A value above 1.03 may indicate the values are regressive: over valuing lower value properties
- A value below .98 may indicate the values are progressive: over valuing higher value properties

	2024	2025
PRD*	1.0298	1.004

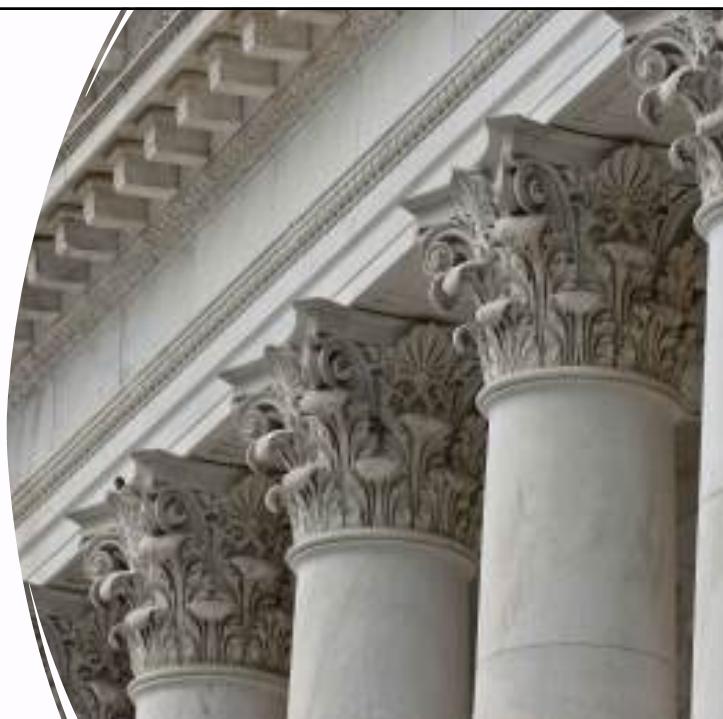
\*PRD after removing the outliers using the 1.5 IQR Rule

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## Appeals Process

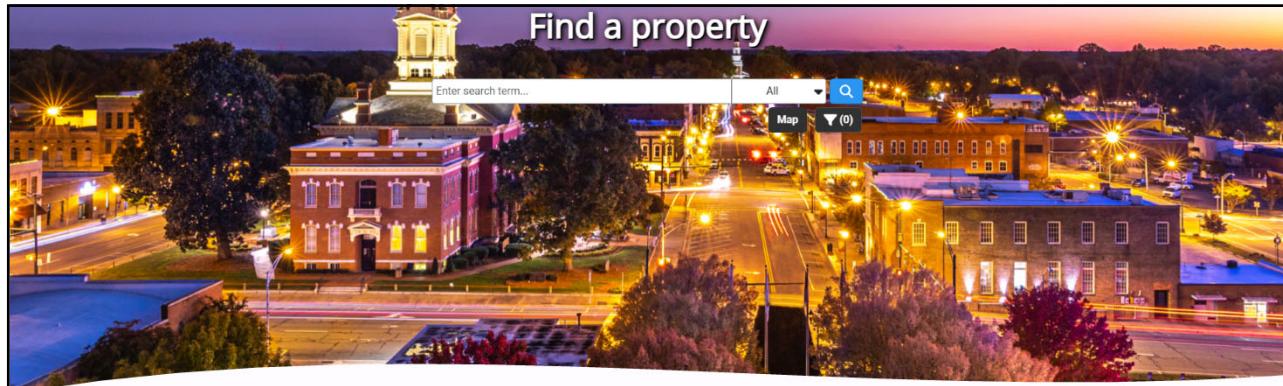
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- There are 5 Stages to the Appeals Process:
  - Informal/Staff Level Review
  - Board of Equalization and Review
  - Property Tax Commission
  - North Carolina Court of Appeals (matter of law)
  - North Carolina Supreme Court (matter of law)



## Board of Equalization and Review

- 2025 Chairman – Dutch Hardison
- Experienced and Qualified Board Members
  - Mark Ashcraft
  - Thomas Smith
  - Rev. Jimmy Bention
  - Robert O'Keefe
- BER Convenes – April 14, 2025
- Expected Adjournment Date – May 28, 2025



- Online Appeals Portal
- Online Property Portal
- Comparable Sales Database
- UCGOV.INFO/MYPROPERTY

## Technology and Customer Service

# COMPET by Spatialest

COMPET - Union, NC  Find Property Help

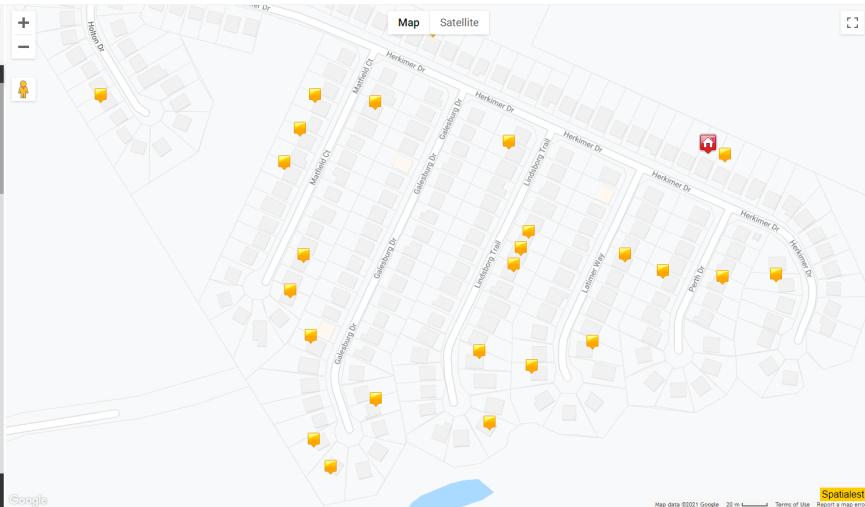
Refine By: Distance 1 miles  Sale Date 2019-01-01 - 2020-12-23  Gross Area 1,891 - 2,837 SqFt  My NBHD  Structure  Year Built  Quality  Bedrooms  Baths  Condition

**Subject Property**  
 3604 Herkimer Dr  
 Distance: N/A  
 PID: 09402689  
 Sale Date: 03/19/2008  
 Gross Area: 2,364 SqFt  
 NBHD: 2944944  
 Year Built: 2007  
**Comparables: Empty**

**25 Nearby Sales**

Address	Distance	Price	Year Built
3602 Herkimer Dr	50 ft	\$215,000	2007
712 Perth Dr	250 ft	\$240,000	2006
711 Perth Dr	361 ft	\$223,000	2006
618 Latimer Way	365 ft	\$232,500	2006
3511 Herkimer Dr	394 ft	\$250,000	2007
615 Lindsborg Trl	531 ft	\$230,000	2005
606 Lindsborg Trl	532 ft	\$234,500	2005

**Map** **Satellite**



Map data ©2021 Google  Terms of Use  Report a map error Spatialest

## Online Appeals Portal

3604 Herkimer Dr

Please review your property information.  
 If you disagree with the value the Assessor has placed on your property you can begin the appeal process here.  
 To view similar properties in your area, and the appraisal data used to establish the value, click on the Visit Comper option. This is a map based tool for residential properties only.



Parcel Number 09402689  
 Owners' Name(s)   
 Parcel Address 3604 Herkimer Dr  
 Current Market Value \$ 250,900

[Go back to search results](#)

Online filing will be enabled once the 2025 values have been noticed. To file in-person, please contact the office for the appropriate appeal documentation.



File an Appeal  
 The appeal season is closed.



Visit Comper  
 Use our comparables tool to compare your property valuation with others.



PRC  
 Visit the Property Record Card for this parcel

## Recognition and Special Thanks

Union County Appraisal Staff and Management		
Michael Thompson	Brad Helms	Jody Fowler-Lemmond
Greg Almond	Joe Hunter	Allan Madge
Donald Ziegler	Dana Chastain	Jay Ecton
Nick Parker	Latoshia Wiggins	Wil Marshal
Brent Smith	Travis Moscuzza	Chelsea Simpson
Jennifer Baldwin	Brittany Sterling	Geoffroy Prevost



Questions?





# Revenues, Receipts, Major Budget Items



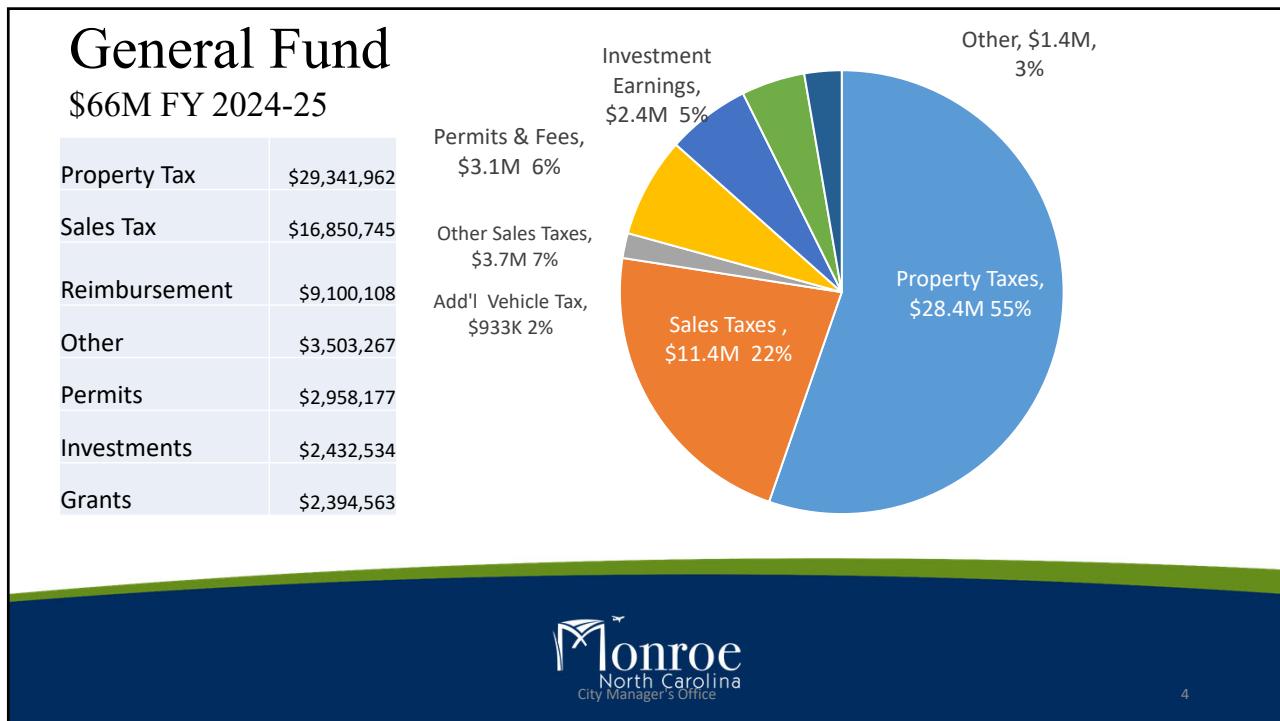
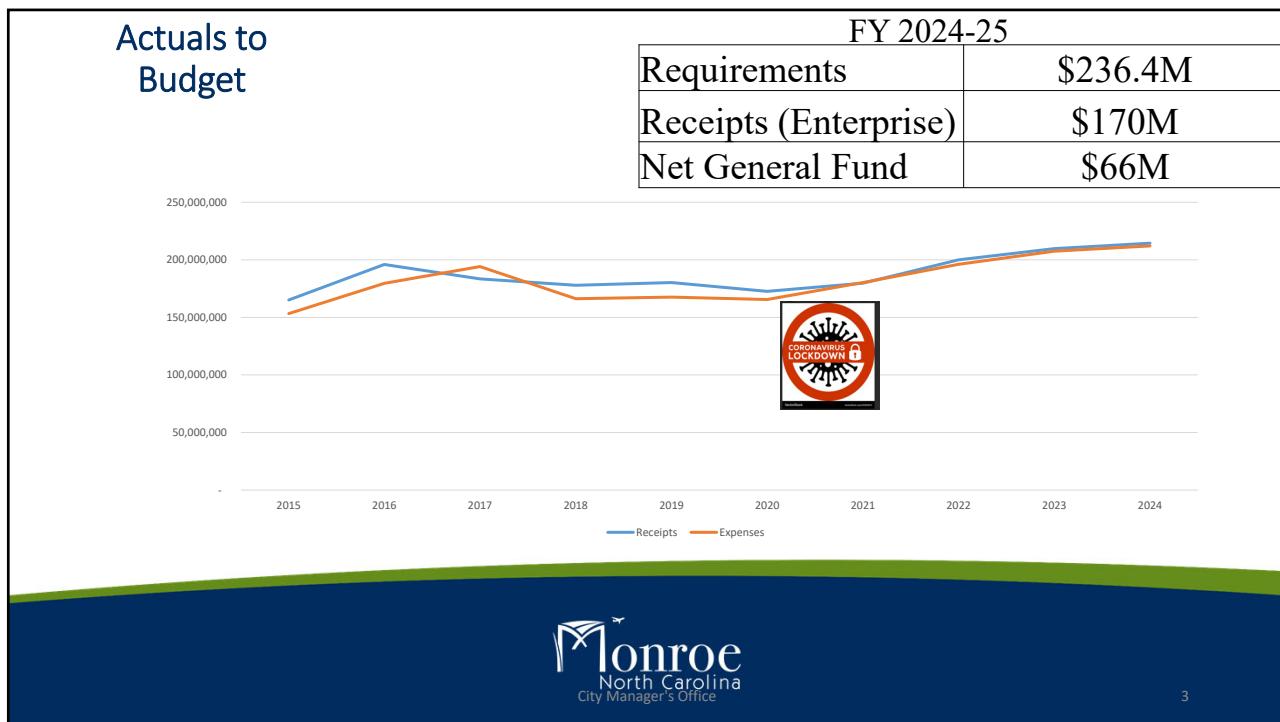
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## Outline

1. Overall Budget
2. General Fund Receipts; Projected Year-End Revenues
3. Ad Valorem and Sales Tax
4. Base Budget Requirements
5. Setting the Tax Rate; Property Tax Impact on Sales Tax Distribution
6. Major Considerations



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## General Fund Revenues

Projected as of 01/31/2025  
– Finance Department

Revenue	FY25 Budget	FY25 Projected	Projected Excess (Shortfall)	FY26 with 9.79% Growth
\$30 vehicle tax	942,626	984,362	41,736	1,080,731
Ad valorem	27,278,148	27,742,952	464,804	30,437,302
Investment earnings	2,244,764	3,233,657	988,893	3,233,657
Miscellaneous	296,960	325,023	28,063	325,023
Other financing sources	10,188,037	10,349,971	161,934	10,349,971
Other sales taxes	3,486,640	4,124,872	638,232	4,124,872
Other taxes & licenses	495,159	557,203	62,044	557,203
Permits & fees	2,670,377	3,165,156	494,779	3,165,156
Powell bill	1,287,105	1,311,187	24,082	1,311,187
Restricted intergov	40,000	89,806	49,806	89,806
Restricted intergov - LEO/SRO	638,343	745,414	107,071	745,414
Sales & services	218,311	146,981	(71,330)	146,981
Sales Tax	12,624,136	13,107,220	483,084	13,107,220
Vehicle tax	2,072,565	2,411,321	338,756	2,647,389
Dowd Center Theatre	531,631	209,306	(322,325)	209,306
Parks & Rec	303,340	263,329	(40,011)	263,329
Golf Course	1,495,196	1,271,824	(223,372)	1,271,824
<b>General Fund Revenues</b>	<b>66,813,338</b>	<b>70,039,584</b>	<b>3,226,246</b>	<b>73,066,372</b>
<i>Subsidized Funds</i>				
Downtown Monroe	74,143	75,426	1,283	82,670
Airport	3,316,008	3,155,260	(160,748)	3,155,260
<b>General Fund &amp; Subsidized Revenues</b>	<b>70,203,489</b>	<b>73,270,270</b>	<b>3,066,781</b>	<b>76,304,302</b>



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## General Fund

- Ad valorem tax/Property Tax –
- 50.25 cents per each \$100 of assessed value
  - **1cent=579k**
  - Tax Based Upon the Assessed Value of an Item
    - Real Property – Real Estate
    - Personal Property, ie. Motor Vehicles, Equipment, etc.
- Downtown District Tax – +19.5 cents per each \$100 of assessed value = **\$75k** for FY 2024-25
- Sales tax
  - Distribution Method is Determined by Union County
  - Counties may choose either per capita or based upon ad valorem tax levies
    - **Union County method – ad valorem tax**



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# Revaluation – Why it Matters

Determines the amount of property tax revenues (largest source of General Fund)

Won't change once set for several years

Supports General Government Services – Fire, Police, Internal Operations, and more

Determines the amount of sales tax receipts

The higher the % of property tax levy compared with the other localities (Union County and all other incorporated municipalities), the higher the % of sales tax (second largest source of General Fund)

Property Tax Receipts Increase by:

Increased tax base

Increased rate

With revaluation; increased values will occur



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General Fund  
and Subsidies  
Base Budget

Department	FY 2024-25 Base Budget	FY 2025-26 Base Budget	Increase/ (Decrease)	% Increase/ Decrease over FY25
Council	704,302	755,602	51,300	7.3%
Administration	4,241,640	4,109,435	(132,205)	-3.1%
Property Management	4,257,555	4,296,127	38,572	0.9%
Communications	516,316	529,296	12,980	2.5%
Finance	7,049,540	8,765,621	1,716,081	24.3%
Human Resources	1,263,934	1,275,586	11,652	0.9%
Engineering	6,882,201	6,900,837	18,636	0.3%
Building Standards	1,534,059	1,534,059	-	0.0%
Planning and Development	1,756,812	1,756,962	150	0.0%
Downtown Monroe	350,709	384,436	33,727	9.6%
Police	17,484,510	17,676,510	192,000	1.1%
Fire	13,923,760	13,940,394	16,634	0.1%
Information Technology	1,974,565	2,109,341	134,776	6.8%
Parks and Recreation	4,196,851	4,477,823	280,972	6.7%
Dowd Theatre	1,117,425	1,117,425	-	0.0%
<b>General Fund &amp; Subsidies</b>	<b>67,254,179</b>	<b>69,629,454</b>	<b>2,375,275</b>	<b>3.5%</b>

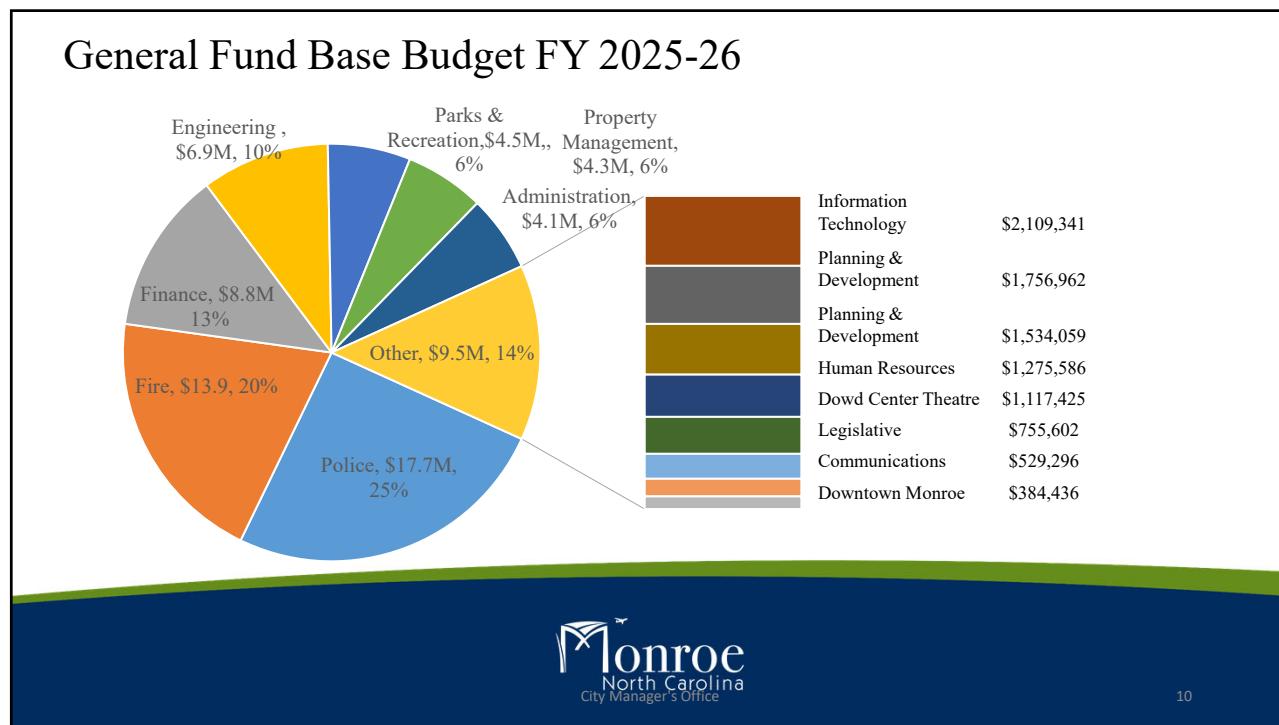


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Enterprise Funds Base Budget	Department	FY 2024-25 Base Budget	FY 2025-26 Base Budget	Increase/ (Decrease)	% Increase/ Decrease over FY25
Water Resources	21,461,436	21,503,066	41,630	0.2%	
Storm Water	2,104,151	2,105,460	1,309	0.1%	
MAFC	3,914,852	3,923,520	8,668	0.2%	
Electric	65,704,880	66,162,701	457,821	0.7%	
Natural Gas	19,303,990	19,301,443	(2,547)	0.0%	
Airport	3,918,330	3,966,449	48,119	1.2%	
Solid Waste	3,518,468	4,486,290	967,822	27.5%	
<i>Enterprise Funds</i>	<b>119,926,107</b>	<b>121,448,929</b>	<b>1,522,822</b>		<b>1.3%</b>
<i>Citywide</i>	<b>187,180,286</b>	<b>191,078,383</b>	<b>3,898,097</b>		<b>2.1%</b>



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# Setting The Tax Rate

Tax Rate Must Be Set in June 2025, when budget is adopted

## Revenue-Neutral Tax Rate (for Comparisons)

Rate estimated to produce revenue for the next fiscal year equal to the revenue that would be produced if no reappraisal had occurred (GS 159-11(e))

- Add a growth factor equal to the average annual % increase due to improvements since the last general reappraisal
- Other adjustments allowed (annexations)

## Rate-Neutral

Ad Valorem tax rate remains the same as previous year with the new schedule of values applied

Increases the Ad Valorem tax revenue significantly and likely increases to sales tax distribution



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## Process for Approving the Budget and Setting the Tax Rate

1. City Manager Mark Watson Presents Budget Needs to Council
2. CM Receives Feedback through meetings
3. CM will put together the recommended budget
4. A tax rate will be determined to support the budget, based upon budget needs, and recommended to Council
5. Revenue neutral rate will be included
6. Council Approves the FY 2025-26 Budget supported by the Tax Rate by June 30, 2025



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## Sales Tax Basics (GS 105)

- State = 4.75%
- Counties between 2 cents - 2.75 cents (mostly shared w/ municipalities)
  - 2 cents = All 100 Counties levy
    - Art 39 1% POS
    - Art 40 ½% (of county's share 30% schools)
    - Art 42 POS Basically ½% (of county share 60% schools)
  - Art 46 ¼ cent “optional quarter cent” (stays w/ county
    - only 48 counties levy this tax) POS for those counties and counties don't have to share it (Union doesn't participate)
  - Art 43 (transit tax – only 4 counties)



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## Sales Tax – Significant to General Fund of Municipalities

1. Second Largest Source of General Funds @ \$11.4M for Monroe
2. Distribution is determined by the County – based upon the ad valorem levies of all localities, including the County government, within Union County
3. How the City sets its ad valorem rate determines the distribution %
4. The higher the % of property tax levy compared with the other localities (Union County and all other incorporated municipalities), the higher the % of sales tax



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## Local Option Sales Tax Collection History

Fiscal Year	County Total Ad Valorem Levy	Monroe's Ad Valorem Levy	Monroe's % of Total Levy	Actual Amount Received
2015	200,282,357	19,328,664	9.65%	5,248,591
2016	229,586,122	19,265,847	8.39%	5,248,826
2017	228,190,576	19,623,523	8.60%	6,195,900
2018	233,562,431	19,934,686	8.54%	6,215,031
2019	246,449,871	20,991,020	8.52%	6,653,962
2020	244,753,905	22,291,944	9.11%	8,112,034
2021	252,729,717	24,075,565	9.53%	9,424,718
2022	262,090,753	23,752,924	9.06%	10,624,120
2023	288,149,953	24,711,231	8.58%	10,844,264
2024	298,234,170	25,968,730	8.71%	11,380,354
2025 *	305,235,068	28,462,931	9.32%	12,624,136

\* Projection



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## Last time Chart



County Municipality	Ad Valorem Levies	% Share of Distribution Ad Valorem	Month of June	Distributions	% Change
INDIAN TRAIL	\$ 7,362,042.00	3.00794%	Jun-19	\$ 2,269,768.51	
INDIAN TRAIL	\$ 7,570,469.00	2.99548%	Jun-20	\$ 2,517,642.13	11%
INDIAN TRAIL	\$ 7,685,423.00	2.93235%	Jun-21	\$ 2,846,952.53	13%
INDIAN TRAIL	\$ 10,464,801.00	3.63172%	Jun-22	\$ 3,289,753.16	16%
INDIAN TRAIL	\$ 10,883,873.00	3.64944%	Jun-23	\$ 4,517,795.13	37%
INDIAN TRAIL	\$ 11,410,758.00	3.73835%	Jun-24	\$ 4,732,196.76	5%
MONROE	\$ 22,291,944.00	9.10790%	Jun-19	\$ 6,643,481.71	
MONROE	\$ 24,075,565.00	9.52621%	Jun-20	\$ 7,603,691.08	14%
MONROE	\$ 23,752,924.00	9.06286%	Jun-21	\$ 9,024,221.24	13%
MONROE	\$ 24,711,231.00	8.57582%	Jun-22	\$ 10,191,261.07	13%
MONROE	\$ 25,968,730.00	8.70750%	Jun-23	\$ 10,894,050.21	7%
MONROE	\$ 28,462,931.00	9.32492%	Jun-24	\$ 11,282,178.99	4%
UNION	\$ 199,052,664.00	81.32768%	Jun-19	\$ 46,352,522.52	
UNION	\$ 204,276,477.00	80.82804%	Jun-20	\$ 49,111,099.84	6%
UNION	\$ 213,348,800.00	81.40263%	Jun-21	\$ 56,436,956.84	15%
UNION	\$ 230,842,647.00	80.11196%	Jun-22	\$ 66,471,710.27	18%
UNION	\$ 238,134,152.00	79.84803%	Jun-23	\$ 73,886,568.80	11%
UNION	\$ 241,476,452.00	79.11164%	Jun-24	\$ 74,670,281.59	1%
WAXHAW	\$ 7,637,157.00	3.12034%	Jun-19	\$ 2,100,105.11	
WAXHAW	\$ 8,074,468.00	3.19490%	Jun-20	\$ 2,589,765.30	23%
WAXHAW	\$ 8,339,623.00	3.18196%	Jun-21	\$ 3,030,797.95	17%
WAXHAW	\$ 11,740,114.00	4.07431%	Jun-22	\$ 3,564,857.52	18%
WAXHAW	\$ 12,477,815.00	4.18390%	Jun-23	\$ 5,056,987.96	42%
WAXHAW	\$ 12,911,749.00	4.23010%	Jun-24	\$ 5,416,478.96	7%

BIG INCREASE

Small Increase

Small Increase

BIG INCREASE

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## General Fund - Major and Significant Considerations

- Fire Station #6 Debt Service Payments Begin
  - **2026 \$1.65M; ramps up to \$5.7M in FY 2027-28**
- Streets/Paving Program – Identified Priority; cost TBD
- Fire Engine #3 Replacement \$1.2M
- Employee Cost-of-Living Adjustments
  - 1% = \$468,824
  - 2% = \$937,648
  - 3% = \$1,406,472
  - 4% = \$1,875,296
  - 5% = \$2,344,120
- Employee Merit 2% = \$937,648
- State Pension Contribution **\$350,000**
- Health Insurance Contribution **\$220,000**
- Workers' Compensation Increase **\$125,000**



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**Discussion  
and  
Questions???**

City of Monroe

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# City of Monroe Engineering

Budget Work Session  
March 3, 2025



## Outline

1. Mission
2. Responsibilities
3. Organizational Chart
4. Budget Information
  - A. Engineering Services
  - B. Street Division
  - C. Powell Bill
  - D. Solid Waste
  - E. Stormwater
5. Recent Organizational Changes
6. Upcoming Budget Needs

## Stormwater Vision/Mission

**Vision:** The vision of the Stormwater Engineering Division is to build a sustainable and resilient community in Monroe where local waterways and watersheds are protected from stormwater pollution and where flooding risks are minimized, ensuring clean, safe, and abundant water resources for current and future generations

**Mission:** To serve the City of Monroe by improving the quality of our rivers, creeks, lakes, and streams, and safely conveying stormwater through well-maintained drainage systems.

## Responsibilities

### Engineering Services

- Provides land development and erosion control plan review services, including related construction inspections.
- Oversees the planning, design, construction, and inspection of public facilities and projects.
- Prepares and maintains engineering maps, records, and cemetery deeds.
- Administers traffic calming program.

### Solid Waste

- Ensures the timely collection of solid waste and recycling to residents and businesses.
- Assists both internal and external customers with requests/complaints.
- Outreach/Education
- Route inspections.

# Responsibilities

## Stormwater

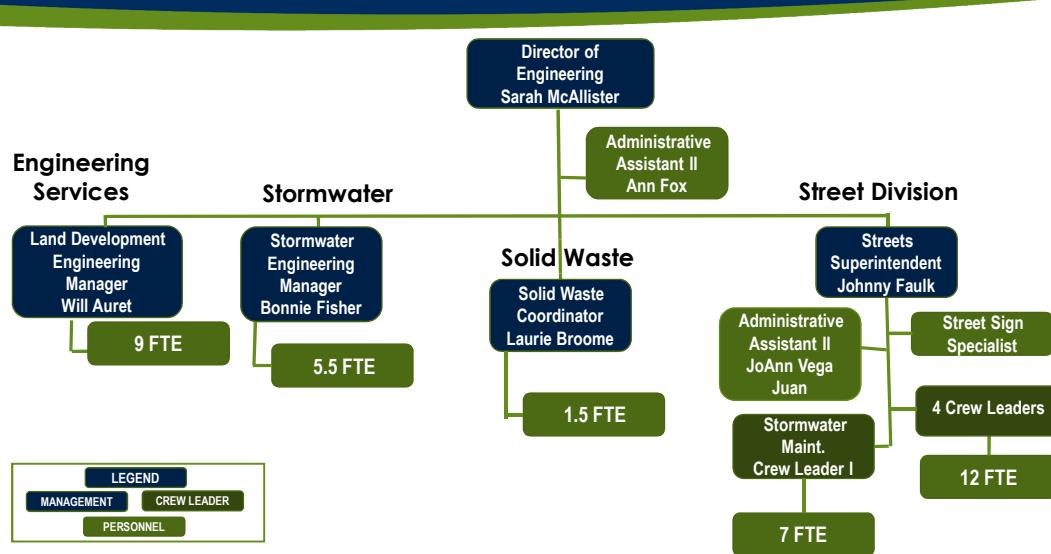
- Build a sustainable and resilient community in Monroe where local waterways and watersheds are protected from stormwater pollution and where flooding risks are minimized.
- Protect and improve quality of our rivers, creeks, lakes, and streams, and safely convey stormwater through well-maintained drainage systems.

## Street Division

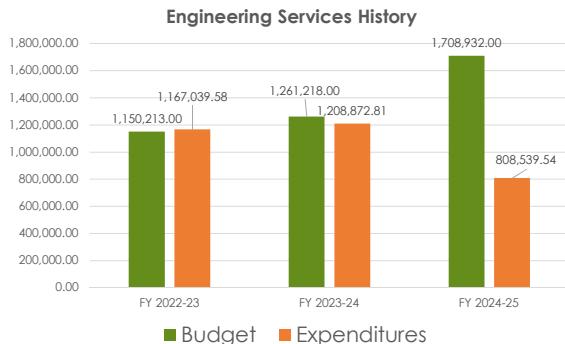
- Maintains City rights-of-way including asphalt maintenance, pothole, curb & gutter, sidewalk, storm drainage, and signage repairs.
- Installs speed cushions.
- Opens and closes graves within the City's two cemeteries.
- Provides barricades and detour signage for events.
- Responds to and clears hazards during storm events and on an on-call basis.
- Responsible for brine and road salt application during winter events in addition to snow plowing when needed.

# Engineering's Organizational Chart

**48 FTE**

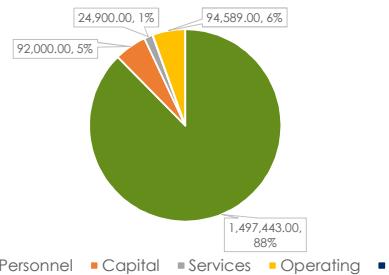


## Budget Composition FY 2024-25 (Authorized) Engineering Services 3010 (\$1.7M)



\*FY 25 – Two New Construction Inspectors Added

### Engineering Services Budget 2024-25

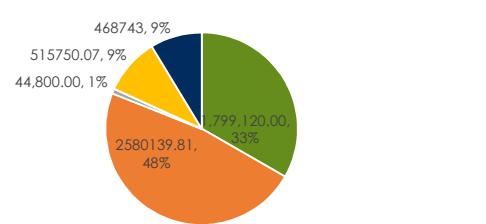


Requirements	\$1.7M
Allocations from Enterprise Funds	- \$400k
Net Budget	\$1.3M
FTE Positions	12

## Budget Composition FY 2024-25 (Authorized) Street Division 3020 (\$5.4M)

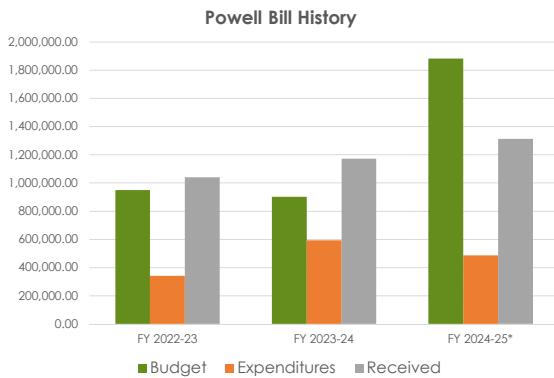


### Street Division's Budget FY 2024-25

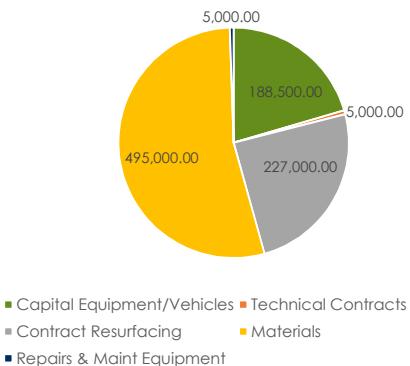


Requirements	\$5.4M
Allocations from Enterprise Funds	- \$550k
Net Budget	\$4.9M
FTE Positions	27

## Budget Composition FY 2024-25 (Authorized) Powell Bill 3025 (\$1.88M)

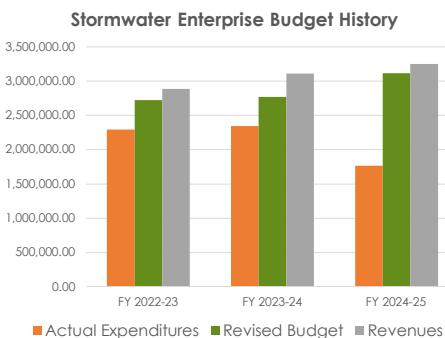


### Powell Bill Budget FY 2024-2025

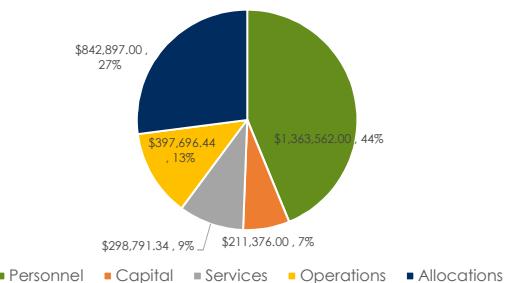


\*FY25 includes \$960k allocation from Powell Bill Reserves for Contract Resurfacing

## Budget Composition FY 2024-25 (Authorized) Stormwater (\$3.1M)

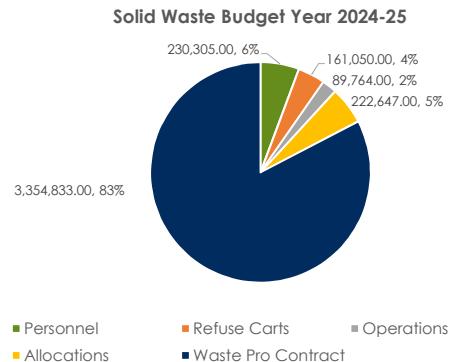
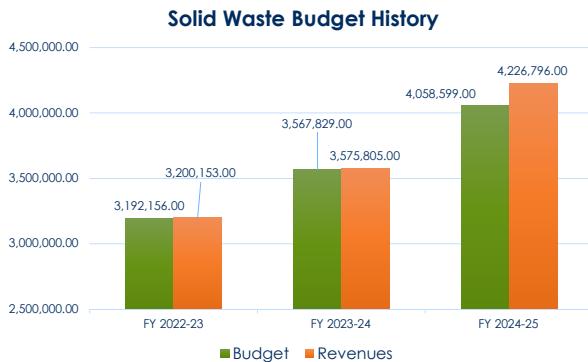


### Stormwater Enterprise Budget Year 2024-2025



FTE Positions = 6.5

## Budget Composition FY 2024-25 (Authorized) Solid Waste (\$4.06M)



FTE Positions = 2.5

## Recent Budget and Organizational Changes

### FY 2023-25

- Addition of 2 new FTE – Construction Inspector and ESC Inspector
- Reclassified two positions from Supervisors to Managers
- Removed Community Maintenance from Solid Waste budget to Planning Department

## Upcoming Needs

### Engineering Services

- 1 new FTE, Civil Engineer (ESC plan reviews)
- \$200k Sidewalk Maintenance
- \$4k Critical Intersection Analysis Grant Match
- \$30K Safe Streets for All Grant Match
- \$15k City Hall Ladies Bathroom Renovation
- \$384k total

## Upcoming Needs

### Streets

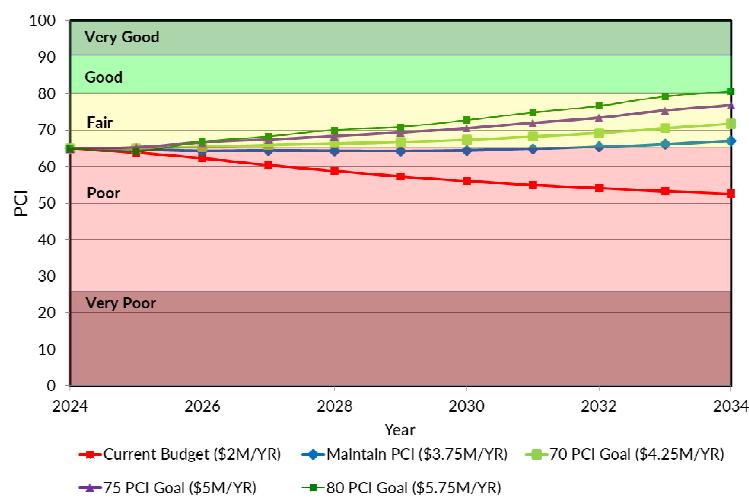
- 4 new FTE – Equipment Operator Is (adding one EO I to each crew)
- 1 new FTE – Street Sign Technician
- \$18k – New flooring at Street Division in the main crew area
- \$35K – Consultant Structural Engineering Design Services for Repairs to Street Division's Equipment Shed/Garage
- 181K – Increased Budget for Street Lights
- \$572k total

## Upcoming Needs

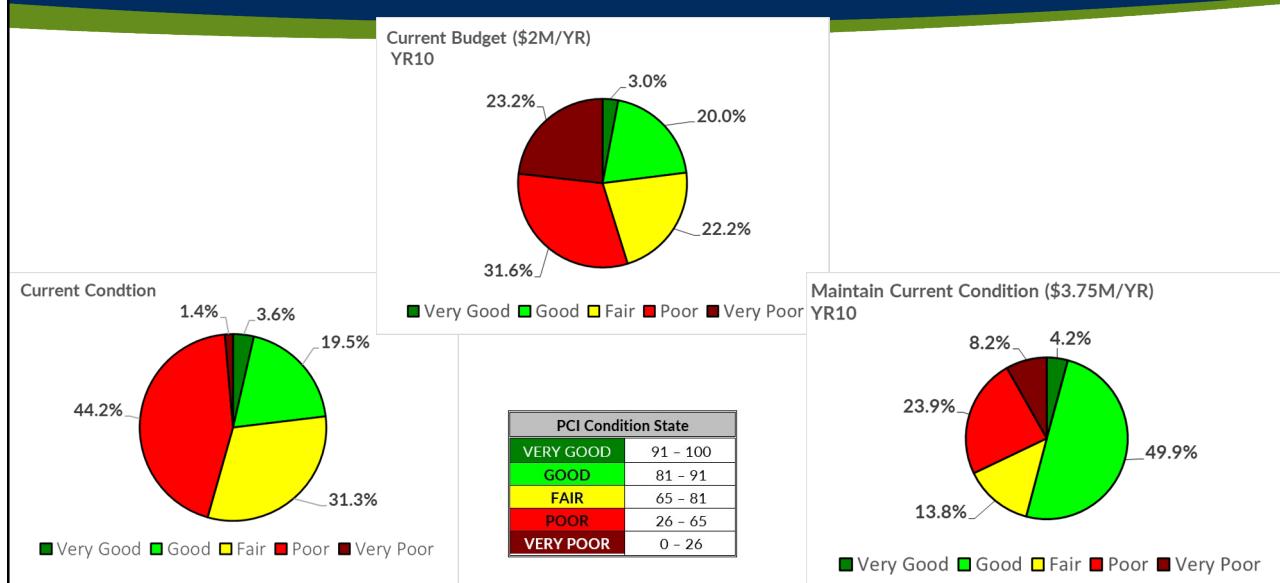
### Powell Bill

- \$110k – Replace F550 Tool Truck
- \$36k – Replace Cold Planer
- \$106.5k – Replace Mini Excavator
- \$13.2k – Replace 2011 Hudson Trailer
- \$40K – Traffic Signal Design and Replacements (5)
- \$50k – increase to Roadway Maintenance (materials)
- \$210k – increase Contract Resurfacing Allocation
- All available in current annual allocation.

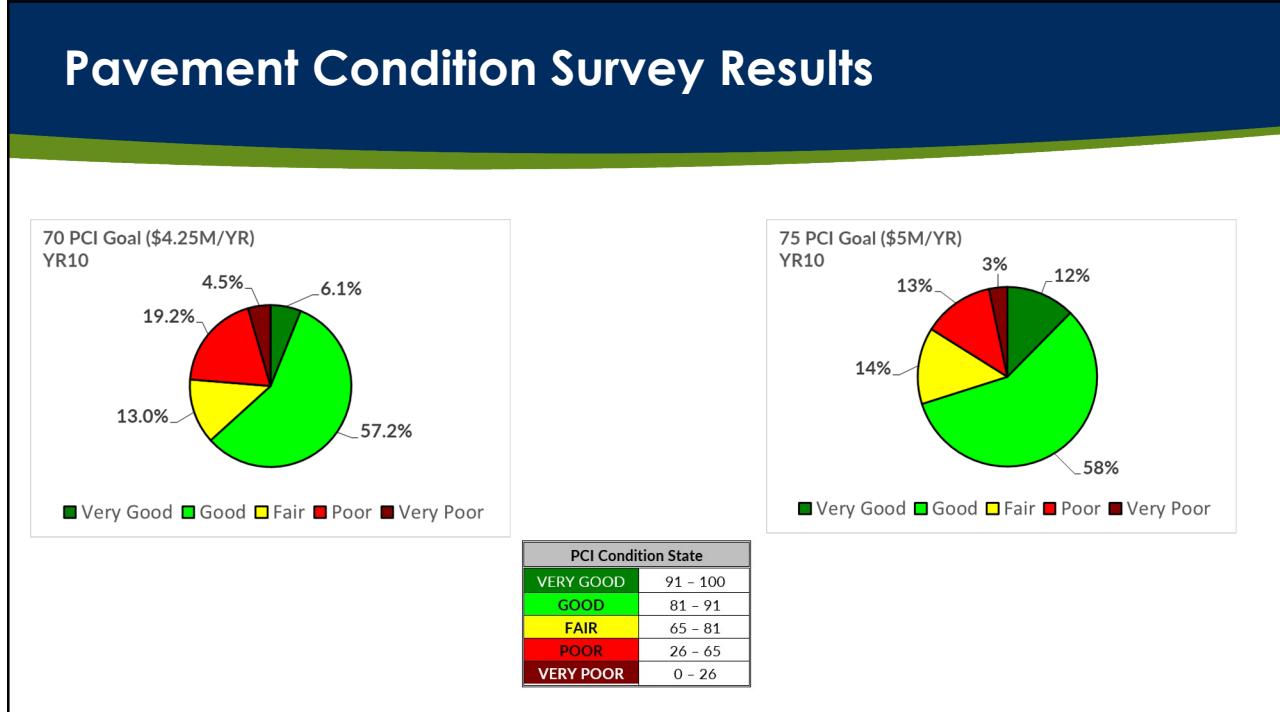
## Pavement Condition Survey Results



## Pavement Condition Survey Results



## Pavement Condition Survey Results



## Additional Funding Needed Per Scenario

### Contract Resurfacing

Scenario	Budget Per Year	Current Budget Per Year	Additional Needed Per Year	Pennies w/o PB Reserves	Pennies w/ PB Reserves
Maintain PCI	\$ 3,750,000.00	\$ 2,279,000.00	\$ 1,471,000.00	2.54	1.31
PCI Goal 70	\$ 4,250,000.00	\$ 2,279,000.00	\$ 1,971,000.00	3.40	2.17
PCI Goal 75	\$ 5,000,000.00	\$ 2,279,000.00	\$ 2,721,000.00	4.70	3.47

## Upcoming Needs

### Stormwater

- 1 new FTE – Civil Engineer Plan Reviewer
- \$106.5k - Replace Mini Excavator
- \$400k – Winchester Ave Culvert Replacement Construction by Contract
- \$50k – Banking towards future Stewarts Creek Watershed Water Quality Project
- \$20K – Increase in Materials (pipe/stone/matting/etc.)
- \$687k total - All available in current annual allocation

## Proposed Fee Schedule Changes - Stormwater

Description	FY2024 - 2025	FY2025 – 2026	Effect on Revenue
2024-25 Stormwater Permit Application For the first Acre Disturbed Each additional acres disturbed	\$1,250 \$100/acre		
Re-review fee for stormwater plans (charged on the second submittal, and to increase incrementally by \$200 each submittal thereafter)	\$100 for 2 <sup>nd</sup> . \$300 for 3 <sup>rd</sup> . \$500 for 4 <sup>th</sup>		
Floodplain Development Permit No-Rise Certification CLOMR/LOMR	None	\$100 \$250	+ \$250 New fee
2025-26 Stormwater Permit Application (up to three (3) review cycles)			
Residential and Commercial with Detention For the first Acre Disturbed Each additional acres disturbed		\$2,500 \$100/acre	+ \$8,500 Increase of \$850 for three review cycles
Non-Residential with No Detention For the first Acre Disturbed Each additional acres disturbed		\$1,650 \$100	No change for three review cycles
Re-review fee for stormwater Plans (4 <sup>th</sup> submittal and each thereafter)		\$500	No change in re-review fee

## Proposed Fee Schedule Changes - Stormwater

Description	FY2024 - 2025	FY2025 – 2026	Effect on Revenue
2024-25 Residential Rate- Single Family Detached/Mobile Homes Tier – Impervious Area (square feet) 0 to 2,010 2,011 to 3,287 3,288 and beyond	\$3.68 per month \$5.25 per month \$7.35 per month		
Residential Rate – Other Residential Units (by dwelling unit) Town Homes Multifamily Condominiums	\$2.63 per month \$3.15 per month \$2.63 per month		
2025-26 Residential Rate- Single Family and Other Residential (by dwelling unit) Tier – Impervious Area (square feet) 0 to 1,500 1,501 to 3,200 3,201 and beyond		\$3.68 per month \$5.25 per month \$7.35 per month	+ \$34,000 Will increase billing for townhomes by 100%, condos/apartments by 40%, and multifamily by 16.8%

## Upcoming Needs

### Solid Waste

- Current Fee \$24.30 per residence (solid waste, recycling, bulk, yard waste)
- Proposed \$2.00 fee increase

### Justification

- CPI Increases (5.2% in FY26)
- Landfill Disposal Increases
- Cart Inventory – replacements and providing new carts
- Community Maintenance affected any previous budget surplus (moved to Planning in FY2024)

## Questions?

Thank you for your time and support!

Budget Work Session  
March 3, 2025



# **City of Monroe Property Management**

## **Department Overview**

Facilities Division  
Grounds Division



### **Outline**

1. Purpose
2. Responsibilities
3. How to Budget for R&R
4. Organizational Chart
5. Current Budget Information
6. Recent Organizational Changes
7. Noteworthy Activities and Upcoming Budget Needs
8. Budget Considerations

## Purpose Statement

The Property Management Department is committed to maximizing the potential of public property assets by focusing on customer service, teamwork, integrity, innovation, knowledge and accountability.

- Over 180 Buildings, including fire stations, machine shops, City Halls, Airport structures, Police Station, Ellen Fitzgerald, Energy Services Buildings, Golf Course Buildings and Parks and Rec Facilities, etc. Valued at \$250M.
- Regular and Routine Maintenance is Necessary
- Planning for Future Needs

## Property Management Responsibilities

### Administration

- Controls execution of all appropriate maintenance contracts.
- Exercises general supervision of maintenance needs.
- Ensures efficiency related to service request response.
- Manages departmental budget.
- Provides interdepartmental support related to City wide maintenance needs.

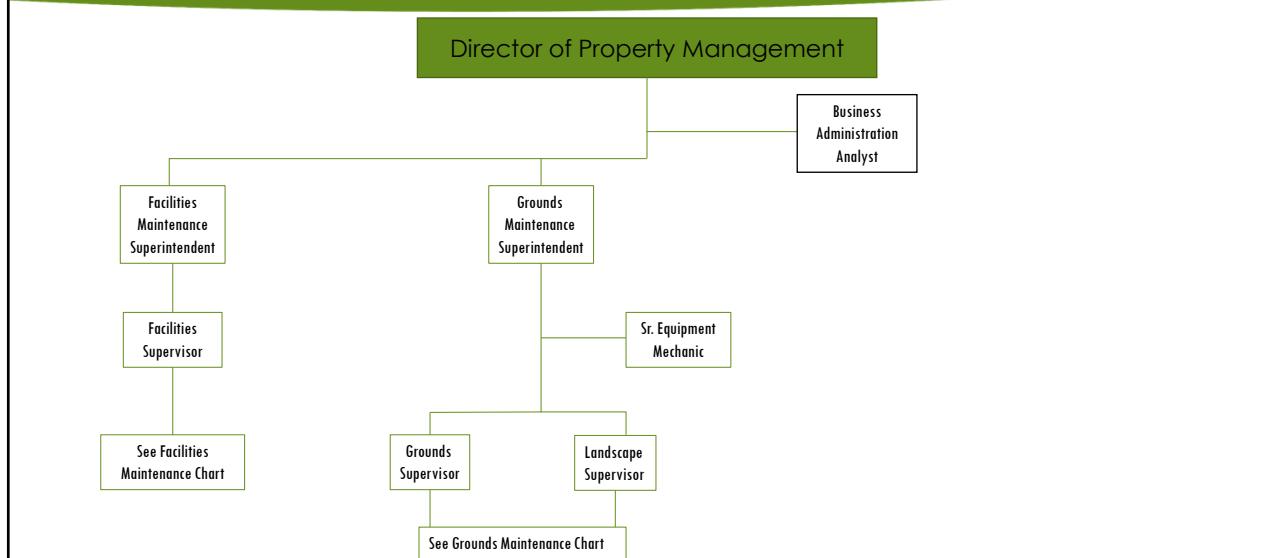
### Facilities

- Schedules preventative maintenance for city assets.
- Prioritizes facility equipment replacement needs.
- Facilitates facility uplift projects.
- Provides appropriate response related to routine maintenance needs of City departments.

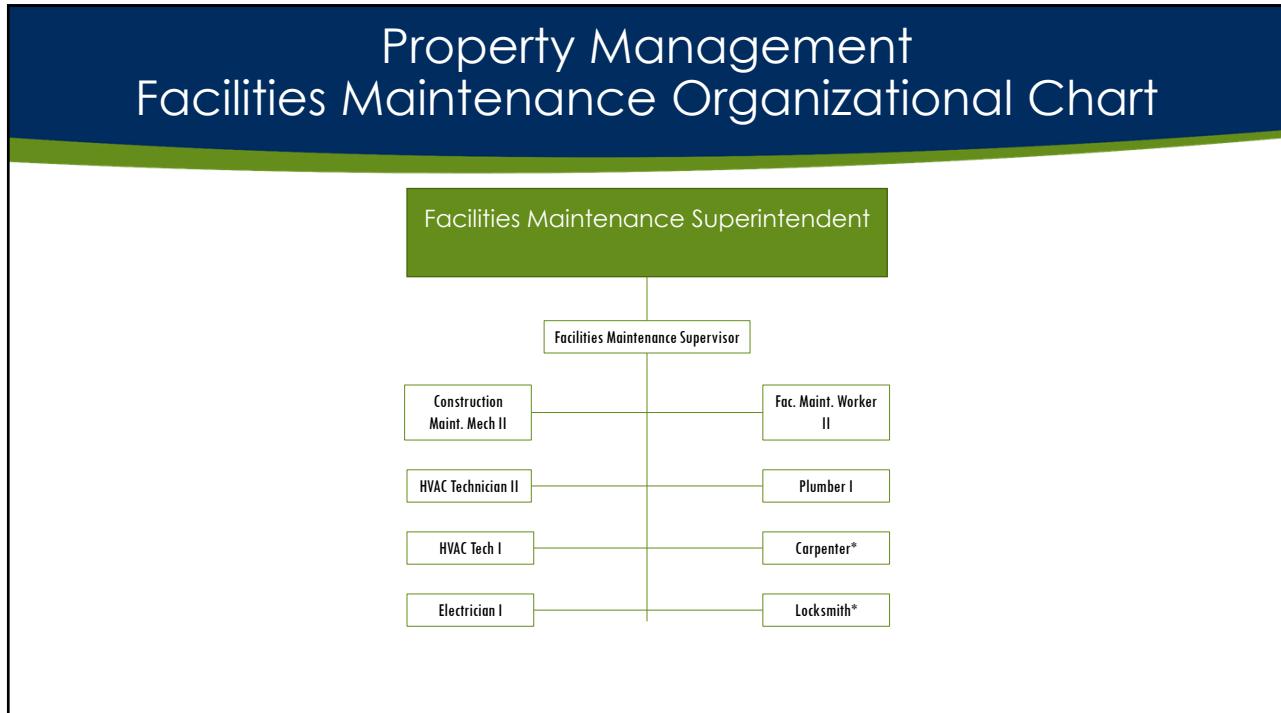
### Grounds/Landscaping

- Provides general grounds maintenance to city parks and facilities.
- Facilitates the city's loose leaf collection program.
- Prioritizes city landscaping projects.
- Provides internal support to City departments through efficient service request response.
- Coordinates appropriate equipment replacement relative to specific City needs.

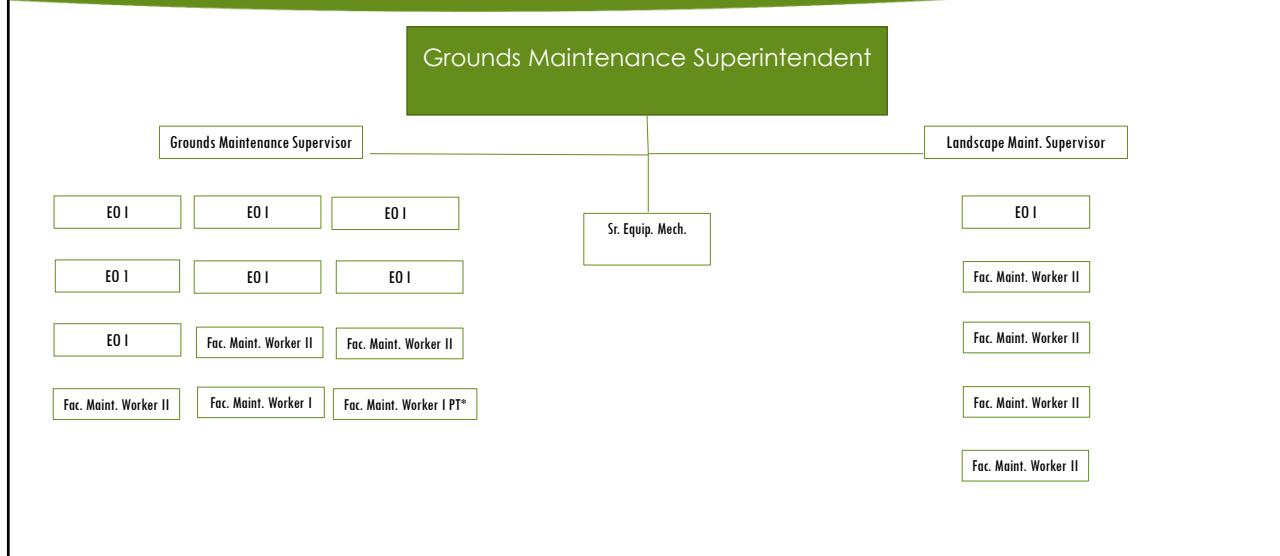
## Property Management Administration Organizational Chart



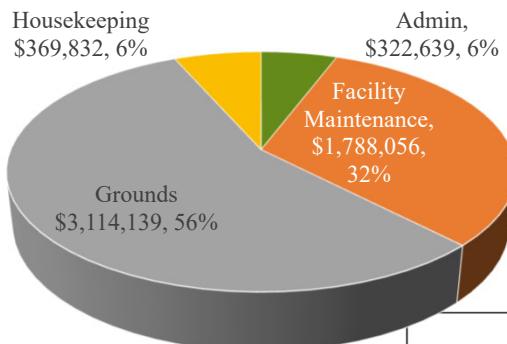
## Property Management Facilities Maintenance Organizational Chart



# Property Management Facilities Maintenance Organizational Chart



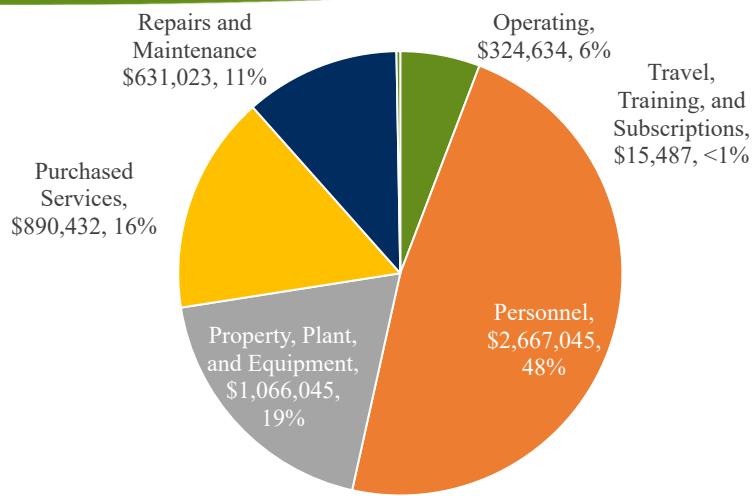
## Property Management FY 2024-25 Budget Total Requirements \$5.6M



	Administration	Facility	Grounds	Housekeeping
Requirements	\$322,639	\$1,567,847	\$3,089,780	\$369,832
Receipts/Allocations		-220,209	-24,359	
Net General Fund	\$322,639	\$1,347,638	\$3,065,421	\$369,832

## Property Management – Budget Composition

Operating	\$324,634
Personnel	\$2,667,045
Property, Plant, and Equipment	\$1,066,045
Purchased Services	\$890,432
Repairs and Maintenance	\$631,023
Travel, Training, and Subscriptions	\$15,487
Total	\$5,594,665



## Government Budgeting for R&R?

- Replacement Value of Buildings
- General Services Administration recommends 2% of Current Replacement Value for Repairs and Renovations; when maintenance is current
- APPA recommends 2-4% of the replacement value, and higher for deferred maintenance conditions
- To maximize the life of our facilities, save \$ in the future

## Building and Capital Asset Valuation

Department	Total Capital/ Including Bldgs	Buildings
Administration	\$9,647,690	\$9,647,690
Airport	\$11,015,039	\$11,015,039
Country Club	\$1,413,919	\$1,413,919
Customer Service Center	\$1,731,703	\$1,731,703
Dowd	\$1,261,775	\$1,261,775
<u>Ellen Fitzgerald Building</u>	\$834,835	\$834,835
Energy Services	\$47,689,537	\$4,130,208
Engineering	\$941,418	\$941,418
Finance	\$205,300	\$205,300
Finance Fleet	\$1,072,510	\$1,055,647
Fire Department	\$9,355,284	\$9,158,060
Golf Course	\$1,003,123	\$1,003,123
MAFC	\$20,637,984	\$20,637,984
Parks and Recreation	\$16,328,462	\$16,272,331
Police	\$5,386,751	14,697,648
Science Center	\$1,799,939	\$1,799,939
Water Resources	\$112,226,931	\$6,591,728
City Administration	\$2,061,813	\$2,061,813
Total	\$247,820,662	\$104,460,160

1. *Insurance Property Report*  
*Does not include vehicles and equipment*
2. *Replacement Values Are Likely Much Higher*
3. *Based upon age of facilities, deferred maintenance, routine preventive maintenance needs = 5% is likely needed to get buildings to improved condition*
4. *5% would be \$5.2M annually for Facilities*

## Plan of Action

- Need a Facilities Condition Report; based upon good, fair, poor of our facilities
- Prioritize Needs of Buildings
  - Life safety and Code Compliance
  - Deferred Maintenance (roof, HVAC, Plumbing, etc.)
  - Needed Updates and Efficiency Updates
  - Aesthetic and Non-Essential Improvements
- Developing a Plan (routine work, periodic work, major renovations, emergency work)

## Property Management Recent Organizational Changes – FY25

- Construction Project Manager from City Manager's Office to Property Management Department.
- Approval of 6 FTE positions within Facilities Division: Plumber I, Carpenter I, Electrician I, HVAC Tech II, HVAC Tech I, Locksmith.
- Approval of 2 FTE positions within Grounds Division: Facilities Maintenance Worker II, Equipment Operator I.
- Reclassification of the Administrative Services Supervisor to Business Administration Analyst within the Administration Division.
- Budget Transfer of the Grounds Maintenance Division from the Parks and Recreation Department to newly formed Property Management Department; Budget Transfer of the Facilities Maintenance Division from the Downtown Department to newly formed Property Management Department.
- Budget Transfers of maintenance and service contracts and funding to Property Management Department from other City departments.
- In 2025, approval by Council to create 1 Housekeeping position – temporary position filled in February 2025

## Property Management Department Considerations for FY 2025-26

Airport - Assignment	Salary	Benefits	Totals
Equipment Operator I (3)	135,000	84,552	219,552
Housekeeping	Salary	Benefits	Totals
Supervisor	40,560	28,437	68,997
Housekeepers (3)	106,080	74,373	180,453
Vehicle - Van (Nonrecurring)			55,000
Operating			15,000
Total			319,449

Eliminate the  
Airport Grounds  
Maintenance  
Contract and  
Reduce Current  
Cleaning Contract

# Property Management Department Capital Needs

## Grounds Maintenance

- Restrooms – PWAC
  - \$210,000.00
- Sutton Park Outdoor Basketball Court Resurface
  - \$28,000.00
- Miscellaneous Equipment Replacement
  - 5 Trucks - \$336,000
  - 2 mowers - \$144,000
  - Bush Hog - \$25,000

## Facilities Maintenance

- Roof Replacements
  - Ballroom
  - Winchester Gymnasium
  - Winchester Pool House
  - Winchester Ceramics Building\$570,000
- Equipment Replacement
  - Bulb Crusher - \$8600.00
  - Mini Excavator - \$61,000
  - HVAC - \$115,000

## Housekeeping

- No capital requests outside of requests made related to new personnel requests.

## Budget Year Comparisons

Category	FY 2024-25 Authorized Budget	FY 2025-26 Considerations	FY 2025-26 Budget Considerations
Personnel	\$2,667,045	\$469,002	\$3,136,047
Property, Plant, and Equipment	\$1,066,045	\$1,460,000	\$1,704,234
Purchased Services	\$890,432		\$575,000
Repairs and Maintenance	\$631,023		\$631,023
Operating	\$324,634	\$15,000	\$339,634
Travel, Training, Subscriptions	\$15,487		\$15,487
Totals	\$5,594,665	\$1,944,002	\$6,401,424

1. FY 2024-25 (includes \$821,811 in capital and facility improvements)
2. Total for FY 2025-26 Budget Considerations backs out 2024-25 Capital of \$821,811)

# Questions?



# **City of Monroe**

## **Planning & Development**

### **Department**

Budget Work Session

March 3, 2025



## **Presentation Outline**

1. Mission
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Recent Organizational Changes
6. Noteworthy Activities and Upcoming Budget Needs

## Mission

The Planning and Development Department's Mission is to create a sustainable community of lasting values by preserving our past and planning for the future while enhancing the quality of life. We are committed to protecting the public, safety and welfare of the citizens within our community through quality customer service, education and planning.

## Responsibilities

### ➤ **Planning**

- Responsible for planning and visioning for the future growth of Monroe, land use management and regulations pertaining to development and growth, plan review, permitting and inspections for current planning, historic preservation, transportation planning, community engagement and zoning enforcement.

### ➤ **Building Standards**

- Performs commercial plan review and is responsible for residential and non-residential inspections for Building, Electrical, Plumbing and Mechanical.

### ➤ **Code Enforcement**

- Investigate and enforce compliance with Minimum Housing, Public Health Nuisance and Illegal Parking in the Yard.

### ➤ **Community Maintenance**

- Responsible for removal of illegal signs, mowing of land bank properties, illegal dumping clean up and litter clean-up on neighborhood streets.

### ➤ **Permit Center**

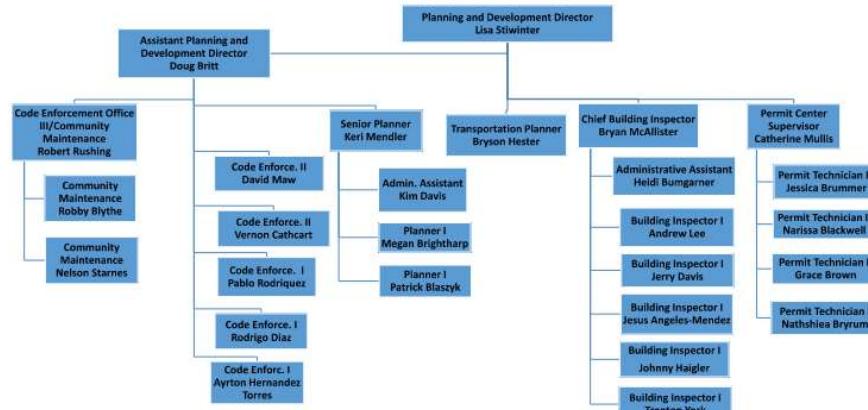
- Responsible for receiving, entering, distributing and issuing permits, scheduling inspections, routing plans for various department review and issuing plan review comment letters.

# Organizational Chart

27 FTE and 2 Contract

## Director

Assistant Director  
Chief Building Inspector  
Senior Planner  
Permit Center Supervisor  
Community Maintenance Supervisor



# Key Performance Indicators

Permitting & Building Standards	FY 23-24	FY 24-25 (actual to date)
Number of total permits issued	8,377	4,834
Single-Family Permits	946	510
Multi-Family Permits	24	24
Field Inspections (includes zoning)	27,974	17,520
Building Code Plan Review	633	367
Mechanical Code Plan Review	166	108
Plumbing Code Plan Review	191	105
Electrical Code Plan Review	469	299

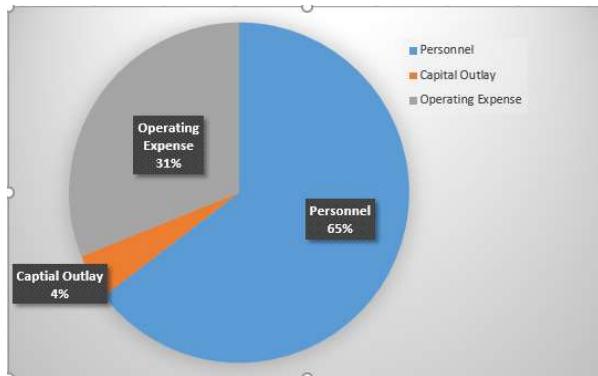
## Key Performance Indicators

Planning and Zoning	FY 23-24	FY 24-25 (actual to date)
Zoning Permits (Single-Family Homes & Multi-Family, Fences, Home Occupations, Driveways, Food Trucks, Temporary Uses, New Structures and Additions, & Signs)	1,527	796
Zoning Verifications & Zoning Violations	45 & 47	31 & 51
Zoning Inspections	1,460	920
Certificate of Appropriateness (COA)	24	45
Special Use Permits/Variance	13	9
Rezonings (General and Site Specific)	17	14
Annexations	3	3
Planning and Zoning Plan Review	3,599	2,095
Subdivisions	37	13
Planning Board, Board of Adjustment, Historic District and City Council Meetings	35	27

## Key Performance Indicators

Code Enforcement and Community Maintenance	FY 23-24	FY 24-25 (actual to date)
Total Code Enforcement Inspections	2,690	2,302
Public Health Nuisance Cases	1,552	930
Minimum Housing Cases	9	8
Parking in the Yard	110	511
Assist Planning with Zoning Enforcement	17	26
Graffiti Cleanup	1	3
Trash, Signs, Tires, Furniture & Misc. Removal	7,721	4,476
Total Landfill Trips	187	134
Total Hour for Removal and Landfill Trips	1438.14	891.34
Total Mowing Hours for Land Bank Properties	69.25	39.75

## Budget Fiscal Year FY 2024-25



Planning & Development	FY 24-25
Expenditures	\$3,107,702
Revenues	\$1,960,096
Difference	\$1,147,606
FTE	27

## Recent Budget and Organizational Changes FY2024-2025

- Addition of 1 new FTE - Permit Center (Permit Technician)
- Addition of 1 new FTE - Planning (Transportation Planner)
- Addition of 2 new FTE - Code Enforcement (Code Enforcement Officers)
- Transfer of 1 FTE – Community Development Manager to City Manager’s Office

## Current Projects

- Contract Award to Kimley Horn for Planning, Design and Construction Documents for US 74/601 Interchange Enhancements & Skyway Drive Streetscape Design Project
- Contract Award to Rummel, Klepper & Kahl, LLP's for On-Call Transportation & Traffic Consulting Services
- Performed an update to Historic District Street, Public & Private Property Tree Inventory
- Evaluated Permitting and Plan Review Process for improvements
- Training new Code Enforcement Officers on Minimum Housing Ordinance
- Released Request for Qualifications (RFQ) for Downtown Master Plan Update

## Upcoming Needs

- Addition of 1 FTE-Zoning and Code Enforcement Supervisor
- Addition of 1 FTE-Permit and Development Administrator
- Concord Avenue Area Revitalization Funds-Specific Action Item- Implementation of Gateway Enhancements and Streetscape Design (annual \$350,000 contribution)
- New Historic District Signage to include design and public engagement for \$25,000.

# Questions?

Thank you for your time and support!

Budget Work Session  
March 3, 2025



# Charlotte-Monroe Executive Airport EQY



1

## Outline

1. Highlights
2. Responsibilities
3. Organizational Chart
4. Budget Information
  - Total Budget, Receipts, Net General Fund
  - Composition
  - Impact of Fee Adjustments from FY 2024-25
  - Historical Trend
5. Recent Changes
6. Considerations for Budget for FY 2025-26
7. Fees

## Highlights



- **Corporate and General Aviation Airport**
- U.S. Customs and Border Protection
- Aircraft Storage for base customers
- Tie-down parking for base & transient customers
- Fuel – Full Service + Self-Serve
- Wash bay
- Other Concierge services

## Facts

- 450,000 people located within 30 minutes of Airport
- Runway: **7,001-feet**
- **73,000** annual operations
- **120+** based aircraft
- Increased corporate jet traffic due to growth at Charlotte-Douglas International

## Economic Impact

- \$90 Million Economic Impact
- \$5.1 Million in tax revenues (private hangars, aircraft, equipment, other)
- 420 Jobs supported

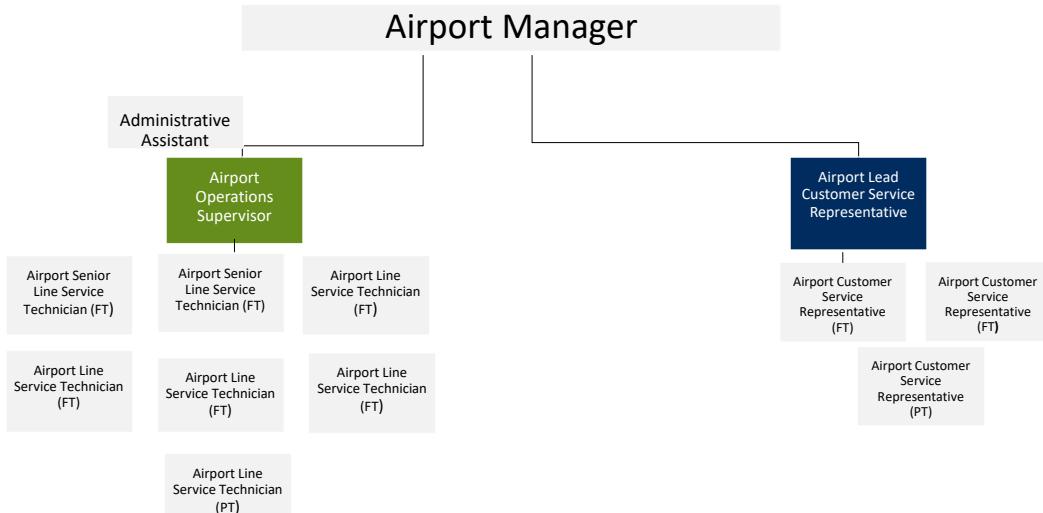
- **For Monroe (FY 2024-25)**
  - **\$50.6M Taxable Value**
  - **\$254,262 Billable Taxes**



City Manager's Office

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## Airport Organization Chart



## Upcoming Projects – State/Federal/Local

- Beginning 2025 - Air Traffic Control Tower – Federal Contract Tower Program (5 years to complete). \$6M from North Carolina State Legislature
- Construction Apron Rehabilitation (Beside Main Terminal and Hangar 1) \$7.5M
- Taxiway from A1-A3; rehabilitation \$12.8M
- Wildlife Perimeter Fence Rehabilitation \$1.2M

City Manager's Office

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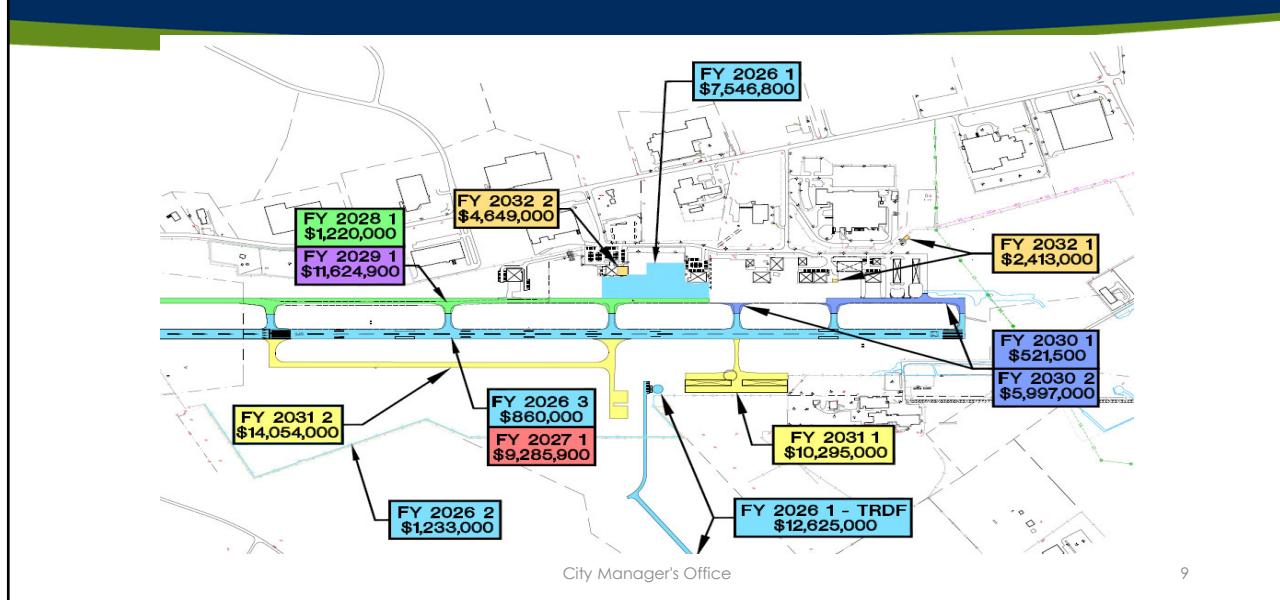
## Federal Requests and Assistance

- Strengthen runway to interim 80,000 DW and Widening and Rehabilitate and Strengthen Taxiway A from Taxiway A-3 To East End of Apron Area D to 80,000 DW \$10.1M
- T-Hangar Expansion and Construction – Expand General Aviation Storage \$10.3M

City Manager's Office

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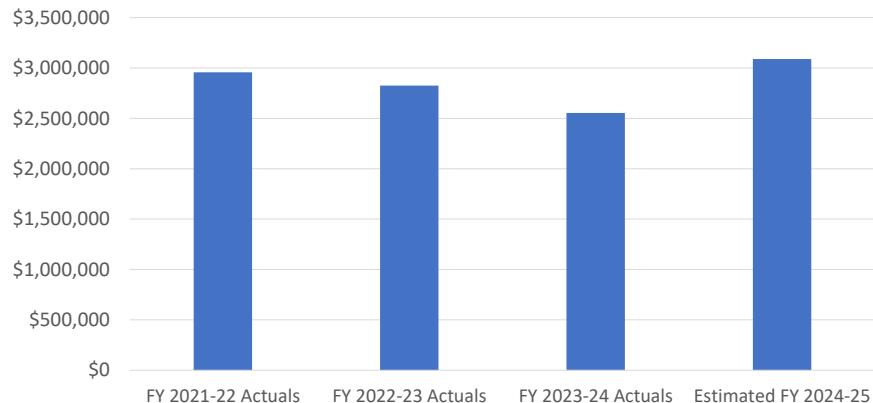
## Upcoming Projects



## Revenues

- Goal – Make Airport Revenues Exceed Operations Cost
- What are the Sources?
  - Fuel Sales
  - Bulk Aircraft Hangar Storage
  - T-Hangar Storage
  - Tie-Downs/Transient Parking
  - Land Leases

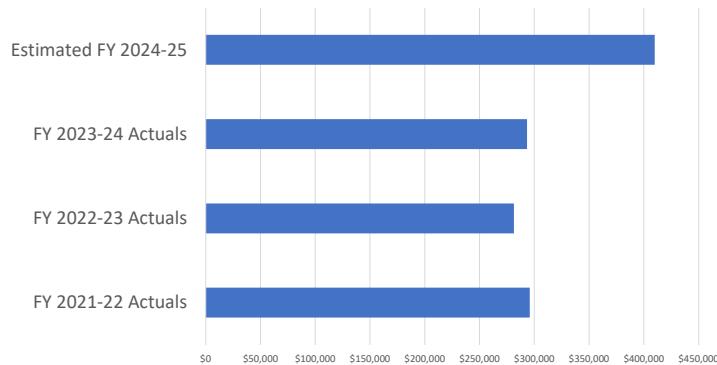
## Revenue Trends



City Manager's Office

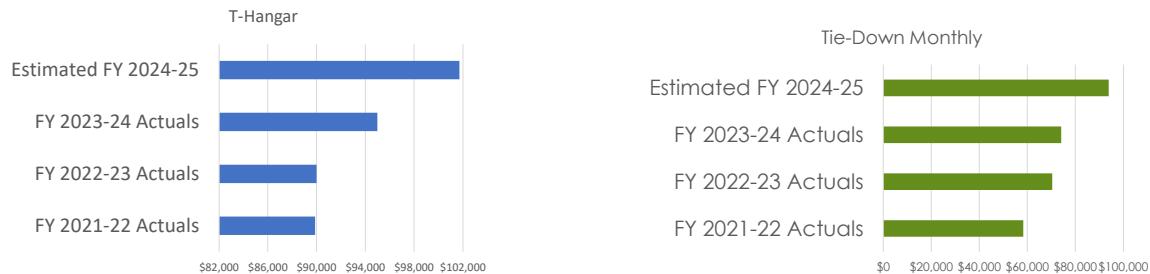
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## Aircraft Storage – Bulk Hangar



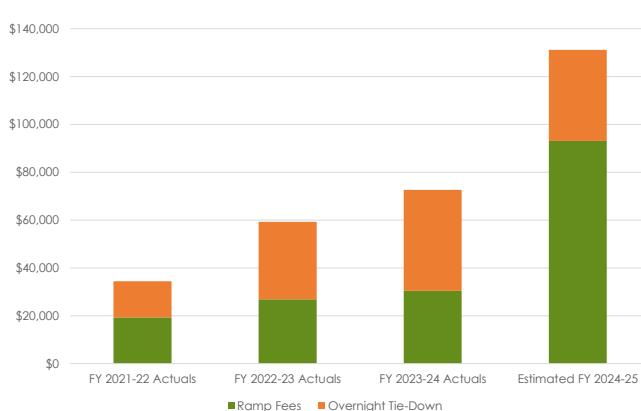
1. \$409K
2. Increase of 39% over 4 years
3. Council adopted a policy to increase storage fees to \$18/sf/yr
4. Phase-In for Existing Customers

## T-Hangars (20 Units) and Monthly Tie-Downs (70)



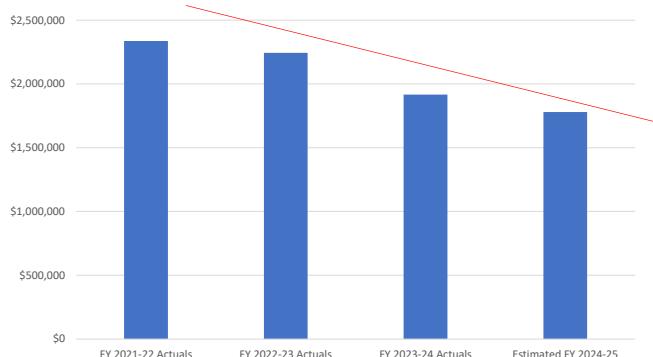
1. Expecting \$195k in FY 2024-25
2. T-Hangars increased 13% in revenues from FY 2021-22 to FY 2024-25
3. Tie-Downs increased 61% over same period

## Ramp and Overnight Fees



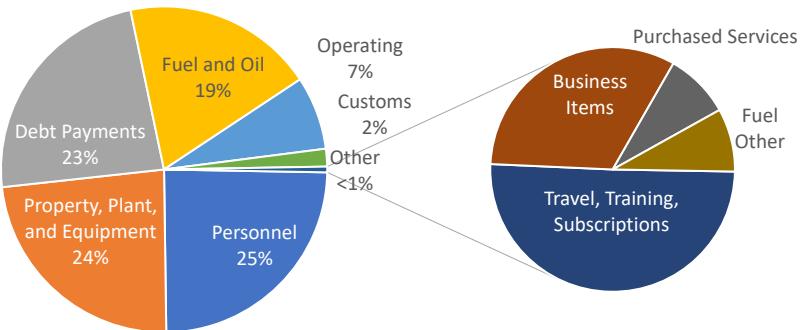
1. \$131k expected in FY 2024-25
2. Increase of 281% from FY 2021-22 to FY 2024-25
3. Ramp Fees heavily increased in current FY
4. Resulted in over \$50k in fees from transient aircraft
5. Must be reviewed together; as Ramp, Landing & Overnight Fees were altered in FY 2024-25

## Revenues- Fuel



1. *\$1.7M expected in FY 2024-25*
2. *Decrease of revenues of 24% over 4 years*
3. *Policies contributed to this reduction*
4. *Fuel Agreements*
5. *Store Customers' Fuel in Our Fuel Storage Facilities*
6. *Pumping Fees*
7. *Ramp and Overnight Fees disincentivized fuel sales*
8. *Will Request a Change in Fees to incentive fuel sales*

## FY 2024-25 Authorized Budget \$4.7M



Category	Authorized FY 2024-25
Personnel	\$1,153,251
Property, Plant, and Equipment	\$1,105,007
Debt Payments	\$1,101,860
Fuel and Oil	\$893,936
Operating	\$342,671
Customs	\$82,678
Travel, Training, Subscriptions	\$13,163
Business Items	\$8,500
Purchased Services	\$2,253
Fuel Rebates	\$2,184

## Noteworthy Activities

### Major Accomplishments

- New Private hangar completed and operational
- Implementation of new fee schedules for hangars, tie-downs, services.
- Provided electronic payment option for hangar and tie-down customers
- Received grant approval from FAA for ramp improvement project
- Completed Obstruction & Tree eradication project
- Wildlife removal through USDA. Work plan with NC DOA to address fence area on east side behind trees
- Ordered (2) new fuel trucks and fuel cart to better support airport customers

## Upcoming FY2026 Budget Needs

- Hangar Repairs and Service Agreements
- Radios for line staff
- Potential Site Development Funds
- Fence Project – Unknown what match funds will be required (Federal and State Funding)
- Tools
- Amount TBD

## Questions

City Manager's Office

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# **City of Monroe Public Communications**

## **Overview**

March 3, 2025



### **Outline**

1. Mission/Vision
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Recent Organizational Changes
6. Noteworthy Activities and Upcoming Budget Needs
7. Recommended FY 2025-26 Budget Increases

## Purpose Statement and Pillars

*The Communications Office strives to be the trusted voice of the City of Monroe.*

**Mission:** Tell Monroe's compelling stories, foster meaningful engagement with our residents and employees, and provide exceptional support to our stakeholders. We enhance public perception, build strong community connections, and ensure that every voice is heard and valued in shaping the future of Monroe.

Build  
Trust

Enhance Public  
Perception

Foster  
Employee  
Engagement

## Responsibilities

### **1. Media & Public Relations**

1. Press releases, interviews, and public information requests
2. Public information campaigns and crisis communications
3. Brand standards management (logo usage, etc.)

### **2. Digital & Content Management**

1. City website management
2. Social media management (Facebook, Instagram, LinkedIn, YouTube)
3. Content creation (photo & video, graphic design, etc.)

### **3. Technical & Event Support**

1. Audio/visual equipment operation and maintenance
2. Livestreaming City Council meetings
3. Additional support as needed

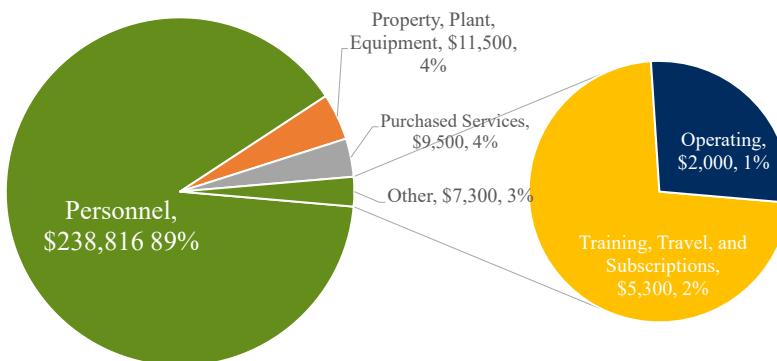
## Public Communications – Current Org Chart



### FY 2023-25

- Communications added 1 Webmaster (FY2023-24)
- Communications & Tourism Director transferred out to create Parks, Recreation, & Tourism Department (Sept. 2024)
- Public Communications became a standalone office in the City Manager's Office

## Authorized Budget Composition FY 2024-25



Total Budget	\$281,840
Receipts (Allocations)	-98,911
Net General Fund	\$182,929

Total Authorized Budget = \$529,476; of which \$248k is Air Show Related Expenses; Recommend reducing the budget by \$248k for FY 2025-26.

## Noteworthy Activities

- **Economic Development & Downtown Revitalization** – Supporting branding, marketing, and web efforts to attract investment and visitors.
  - **Signage at Properties Available for Development (Current Project)**
  - **External Communications of Activities**
- **City Events** – Informing and highlighting major events ie. Air Show.
- **Content Creation** – Managing all City-published content across digital and print platforms.
- **Ongoing Activities** – Running Council Meetings, Special Meetings, streaming, recording, and ensure presentations are set up
- **Internal and Other Department Support** – Ongoing assistance to HR, Finance, Property Management, City Manager's Office, all departments.

## 2025 Considerations - Personnel

1. **AV Tech/IT Liaison (1 FTE)**
2. **Public Information/Communications Specialist Funded through Tourism Development Authority (1 FTE)**
3. **General Fund Amount of \$88,248.**

Positions to Consider	Salary and Benefits
AV Tech/IT Liaison	\$88,248
Public Information/Communications Specialist (TDA)	\$100,000
General Fund Total	\$88,248
TDA Funds	\$100,000
Positions Total	<b>\$188,248</b>

## 2025-26 – Capital and Operations Considerations

1. Capital – Vehicle
2. Operating –
  - Public Records Request Software Contract
  - CivicPlus Contracts for Information Dissemination
  - Software Printing
  - Project Management Software
  - United Way Campaign
  - Vehicle Fuel and Maintenance
3. Property, Plant, Equipment
  - Portable PA System
  - Video Streaming Studio Kit
  - Go Pro Camera
  - Camera Accessories
  - Floor Display and Logo Custom Tent/Table Cover w/ Weight Plates
  - Desktop Workstation Office Equipment for new Staff
4. Purchased Services Social Media Advertisements and other Technical Contracted Services
5. Subscriptions for Staff Development

Category	Amount	Nonrecurring
Capital	\$52,253	\$52,253
Operating	\$47,780	
Property, Plant, Equipment	\$29,077	\$29,077
Purchased Services	\$28,000	
Travel, Training, and Subscriptions	\$1,000	
<b>Total</b>	<b>\$158,110</b>	<b>\$81,330</b>

## Budget Year Comparisons

Category	FY 2024-25	Budget Considerations	FY 2025-26 Considerations
Air Show/Non-Communications	247,636	-247,636	0
Personnel	238,816	188,248	427,064*
Property, Plant, Equipment	30,010	29,077	59,087
Training, Travel, Subscriptions	6,350	1,000	7,350
Purchased Services	3,480	28,000	31,480
Operating	3,184	47,780	50,964
Capital	0	52,253	52,253
<b>Total</b>	<b>529,476</b>	<b>98,722</b>	<b>628,198</b>
<b>*TDA Allowance</b>			<b>-100,000</b>
<b>Net Totals</b>	<b>\$529,476</b>	<b>\$98,722</b>	<b>\$528,198</b>

# Questions

# **City of Monroe City Manager's Office**

## **Department Overview**

**City Manager's Office 03/03/2025**



### **Outline**

1. Mission
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Recent Organizational Changes
6. Noteworthy Activities and Upcoming Budget Needs

# Vision/Mission

## Vision –

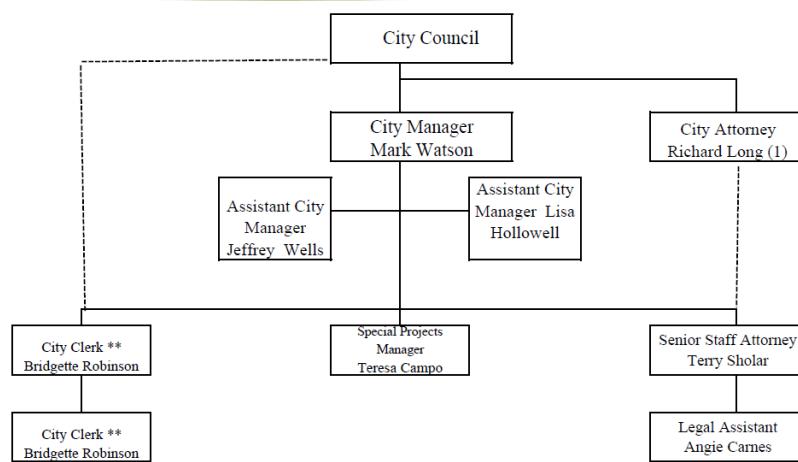
Monroe is a vibrant and progressive community in which its citizens are provided with quality residential and job opportunities and recreational and cultural amenities.

## Mission –

The City of Monroe is committed to providing reliable, responsible, quality service to our customers at the lowest reasonable cost. We accomplish this through professional and courteous service consistent with making Monroe a vibrant and progressive community.

Commitment  
Innovation  
Integrity  
Leadership  
Sensitivity  
Teamwork

## Admin/City Manager's Office Organizational Chart



Revised: 03/04/2025

# Responsibilities

## Management

- Responsible to the City Mayor and Council for conducting the operations of City business in a proper and ethical manner
- Exercises general supervision over the work of all Departments and appoints all Department Heads
- Facilitates discussions among business and group leaders, citizens of Monroe, and other peers
- Communicates regularly with State and federally elected officials as necessary

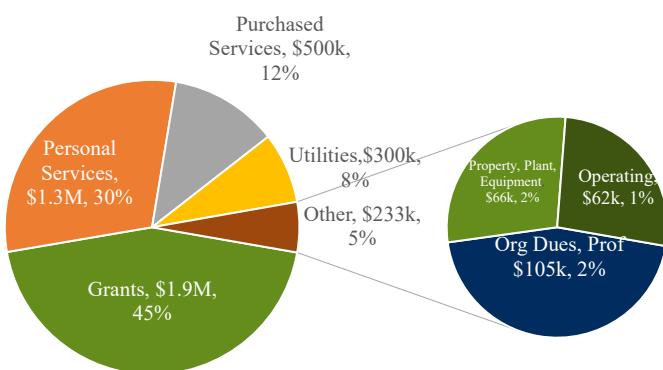
## Legal

- Represents the City of Monroe in all legal matters
- Advises the Council and Manager on matters related to land use, contracts, ordinances, taxes, and finance
- Track changes to State and Federal laws impacting the City of Monroe
- Draft City laws and contracts

## Strategic Projects / Economic Development

- Attract and retain businesses for the City of Monroe
- Develop economic resilience
- Promote businesses
- Incentive Grants

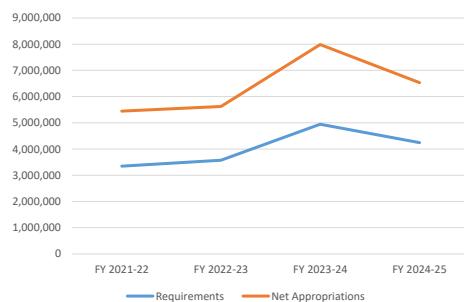
## Budget Composition FY 2024-25 (Authorized) \$4.2 M Budget



Requirements	\$4,241,640
Receipts	-\$1,952,334
Net Appropriations	\$2,289,306
FTE Positions	8

## Budget FY 2024-25

Requirements	\$4,241,640
Receipts/Allocations	-\$1,952,334
Net Appropriations	\$2,289,306



Decrease is due to:

- Tourism Budget Moved Out

## Recent Budget and Organizational Changes

### FY 2023-25

- Addition of 1 new FTE - Assistant City Manager (position filled 11/24)
- Transfer of 1 FTE - Construction Project Manager to Department of Property Management (7/24)
- Transfer of 1 FTE - Communications Director to Parks, Recreation, and Tourism Department
- Director and Operations Budget for Tourism
- Addition of Legal Assistant Position
- Addition of Special Projects Manager

## Upcoming Needs - \$450k

- Legal Department – Succession Planning
  - 1 FTE Staff Attorney
  - \$150k
- Monroe Economic Development Department (MEDD)
  - 1 FTE – Director
  - 1 FTE Existing Business and Industry Manager (Approved and Recruitment Underway)
  - .5 FTE Communications Specialist (promotions, recruitment, operations)
  - \$300k

## Upcoming Needs – Budget Amount TBD

- Security – Assessment Conducted September 2024-February 2025
- Recommendations include:
  - Security Manager/Officer
  - Additional Cameras and Monitoring
  - Police Officer Presence at the Customer Service Center
  - Airport Security Enhancement and Limited Access

## Questions

# **City of Monroe Parks, Recreation and Tourism**

Dowd Theatre, Science Center, Monroe Country Club,  
Aquatics Center, Senior Center, Community Centers, Parks and Athletics  
Budget Work Session  
March 3, 2025



## **Outline**

1. Overview
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Recent Organizational Changes
6. Noteworthy Activities and Upcoming Budget Needs

# Dowd Center Theatre

## Dowd Center Theatre Overview

### **Vision**

The Dowd Center Theatre serves as the cultural and entertainment hub for Monroe and Union County. Through diverse programming the theatre attracts visitors to Monroe and provides a local professional establishment for a variety of entertainment and educational events. The theatre also serves as a major catalyst for growth and development of Monroe and Union County.

### **Mission**

The mission of the Dowd Center Theatre is to explore the boundaries of community, culture, and education by providing unique and diverse entertainment opportunities and experiences for the citizens of Monroe, Union County, and the region.

# Responsibilities

## Director

- Responsible to the City Manager's office for conducting the overall operation of the theatre
- Exercises general supervision over the work at the theatre

## Supervisor

- Suggests and books events and activities at theatre with consultation with director
- Ensures all policies and procedures are followed
- Oversees day-to-day operations and staff
- Oversees facility and interacts with community, developing relationships and partnerships to further theatre mission

## Technical

- Oversees facility management and ensures equipment runs properly
- Runs and sets up technical equipment and meets with performer crews and staff to ensure needs are met.

## Patron Services

- Ensures administrative tasks are completed
- Oversees customer service representatives and monitors show staffing and flow
- Works as box office and serves as initial point of contact for theatre

## Parks, Recreation and Tourism Dowd Center Theatre Organizational Chart

3 FTE, 1 Contract, Several PT

Theatre Supervisor  
Patron Services  
Technical Specialist  
House Manager  
(PT)  
CSR's (PT)  
Marketing Support  
(contract)

**Pete Hovanec**  
Parks, Recreation and Tourism Director

**Lauren Fike**  
Interim Theatre Support

**Theatre Supervisor**  
Vacant

**Lynn Price**  
Theatre Patron Services

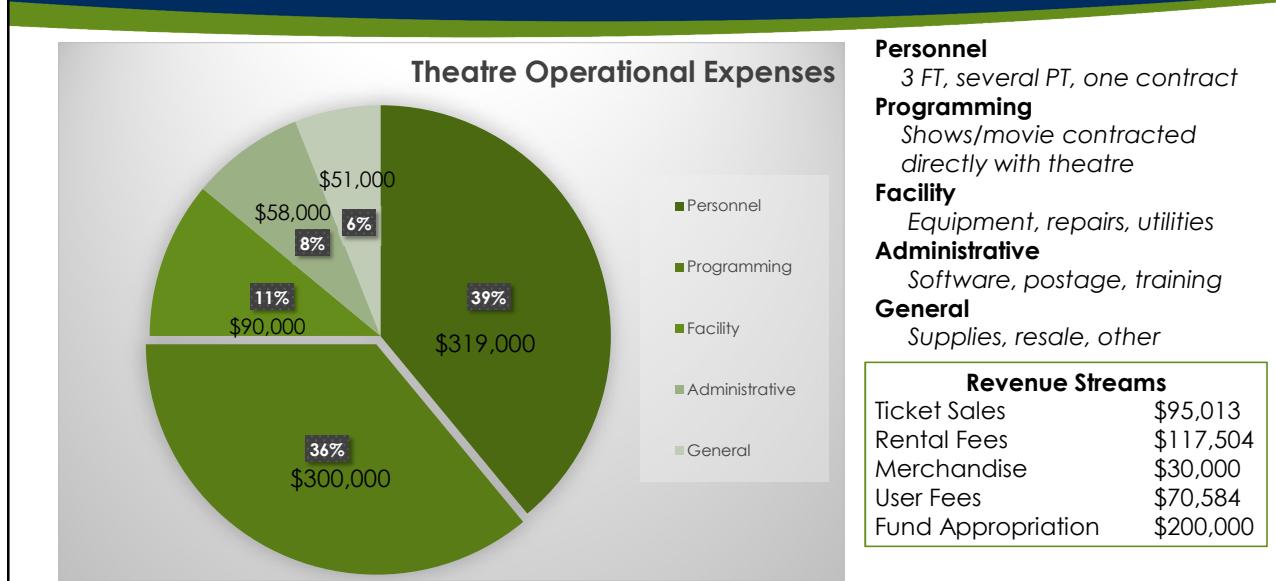
**Paul Riznyk**  
Technical Specialist

**House Manager**  
PT Less 20

**Technical Specialist**  
PT less than 20

**Customer Service Reps**  
PT

## Budget FY 2024-25 \$818,034



## Dowd Center Theatre Moving Forward

**Strategic Operating Plan recently completed. The Dowd Center Mayoral Committee is reviewing the proposed implementation plan with the intent of making a recommendation to Council on policy and operations.**

- In process of developing an accurate pro-forma budget including the future determination of rentals and programming.
- In process of determining best organizational staffing structure for continued growth.
- In process of developing “Friends” non profit advisory/support group for both financial support and personnel support during events.
- In process of shoring up contracts and internal policies regarding overall operation.

# Monroe Country Club Golf Course

## Monroe Country Club Overview

Monroe Country Club offers four tee boxes, Champion Bermuda greens, two putting/chipping practice greens and driving range. Daily walking and riding options are available. Whether it's a quick nine holes or a 120-member tournament, Monroe Country Club is the place to be.

Monroe Country Club's 18-hole course bears the unique distinction of being created by two world-renowned course designers: Donald Ross and Tom Jackson. The front nine was the creation Scottish-born Donald Ross and opened to the public in 1936. The back nine, designed by Tom Jackson, was completed in 1982.

The public course features 6,725 yards of golf measured from the longest tees. It has a slope rating of 132 and a 73.1 USGA rating. The fully equipped pro shop is stocked with reasonably priced shoes, shirts, golf balls, and just about everything you need to play the game. The club is equipped to host tournaments of all sizes and provides the best value and service around. New merchandise arrives regularly, and we also do special orders through our many golf vendors.

# Responsibilities

## Director

- Responsible to the City Manager's office for conducting the overall operation of the golf course
- Exercises general supervision over golf course employees

## General Manager/Head Pro

- Manages day-to-day operations of the golf course and ensures all policies and procedures are followed
- Oversees pro shop merchandise and food sales at the course
- Oversees facility and interacts with community, developing relationships and partnerships to increase usage

## Superintendent/Grounds Supervisor

- Oversees course management and maintenance
- Ensures course is in best possible condition based on best practices
- Ensures necessary equipment and supplies are secured, maintained and applied properly

## Pro Shop/Carts/Starter

- Responsible for overall customer service experience including sales and general appearance
- Ensures pro shop and carts are clean and ready for use
- Enforces rules of golf and course rules regarding play and behaviors on course

## Parks, Recreation and Tourism Monroe Country Club Golf Course Organizational Chart

9 FTE, 1 Contract, Several PT

General Manager/Head Pro  
Superintendent  
Grounds Supervisor  
Senior Mechanic  
Maintenance Crew (5)  
Pro Shop attendants(PT)  
Cart attendants (PT)  
Operational Support (contract)

**Pete Hovanec**  
Parks, Recreation and Tourism Director

**John Miller**  
General Manager

**Bob Bilott**  
Lead Pro Shop Attendant

**Scott Huss**  
Superintendent

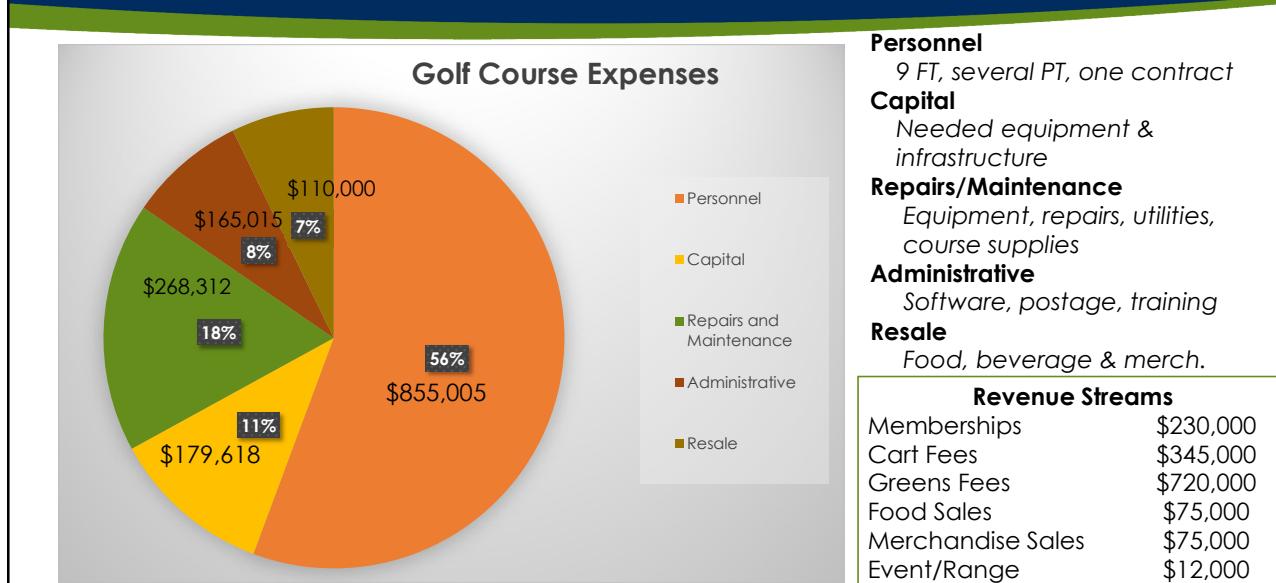
**Pro Shop Attendants**  
**Cart Attendants**  
**Starters**  
PT

**Kenneth Baucom**  
Grounds Supervisor

**Tyler Price**  
Senior Mechanic

**Facility Maintenance**  
5FT 3PT/Seasonal

# Budget FY 2024-25 \$1,576,950



## Golf Course Capital Requests for Next Year \$293,222

### REPLACEMENTS

Below is the list of Capital Equipment requests:

**KIOTI TRACTOR, \$32,539** – The Kioti tractor needs to be replaced with a new backhoe/front end loader. The golf course does not currently have a backhoe for digging.

**TORO 7200 Z- TURN MOWER, \$16,535** – The Toro 7200 needs to be replaced with a new Z-Turn style mower. This mower is used for common areas, deep rough and, most importantly, the 10-acre driving range.

**2015 TORO 4500 ROUGH MOWER, \$94,973** – The Toro 4500 is used to mow the 70+/- acres of rough at the golf course.

**FORD TRACTOR, \$47,102** – The Ford tractor needs to be replaced. Would like to replace with a Kubota Skid Steer. The golf course does not currently have a skid steer.

### STRATEGIC

**GL-9 Golf Lift and Concrete Pad \$15,201** – The addition of a golf lift will allow the senior equipment manager to work on equipment and golf carts in a safe manner. Currently has to use jack stands.

**Golf Cart Wash Pad \$40,000** – The construction of a golf cart wash pad will allow for outside staff to clean carts and bring the dept. in line with Storm Water Dept. guide lines

**Lely WFR Spreader \$8,423** – The addition of a Lely spreader will allow golf course maintenance to spread granular products in bulk. (550 lb capacity)

**Toro Pro Core 648 Aerifier \$38,631** – The addition of a Toro 648 aerifier will allow golf course maintenance to aerify putting greens, tee boxes, collars and approaches.

## Monroe Country Club Moving Forward

**The golf course is a hidden gem in Monroe continues to thrive post COVID. Significant accomplishments and ongoing actions over the next year include:**

- Purchase and delivery of new golf carts, work cart and beverage cart, along with tracking software to improve pace of play and golf course management
- Renovation of pro shop and patio area, construction to start in spring
- Several course projects including tee-box renovations and irrigation system upgrades are ongoing
- Golf simulators will be installed in spring with ballroom renovation to follow
- No additional staff requests for the golf course
- Additional costs for mostly fertilizers and supplies are anticipated

## Monroe Science Center Honoring Dr. Christine Mann Darden

# Science Center Overview

The Monroe Science Center is a hands-on science and learning-themed facility that attracts and educates both local and regional guests. The center serves as a resource for educators and parents looking for a local educational and entertaining alternative and serves as a destination and catalyst for Downtown Monroe.

## City of Monroe Mission Statement:

The City of Monroe is committed to providing reliable, responsible, quality service to our customers at the lowest reasonable cost. We accomplish this through professional and courteous service consistent with making Monroe a vibrant and progressive community.

# Responsibilities

## Director

- Responsible to the City Manager's Office for conducting the overall operation of the science center
- Exercises general supervision over science center employees

## Supervisor

- Manages day-to-day operations of the science center and ensures all policies and procedures are followed
- Oversees staff and develops programming
- Oversees facility and interacts with community, developing relationships and partnerships to increase usage

## Marketing

- Schedules advertisements and promotions
- Books groups and events
- Assists in merchandise ordering

## Customer Service

- Responsible for overall customer service experience: sales, admission and customer experiences
- Ensures exhibits are clean and ready for use
- Enforces rules science center and behaviors of guests.

## Parks, Recreation and Tourism Monroe Science Center Organizational Chart

3 FTE, Several PT  
Supervisor  
Marketing Specialist  
Customer Service Rep  
Customer Service Reps (PT)

**Pete Hovanec**  
Parks, Recreation and Tourism Director

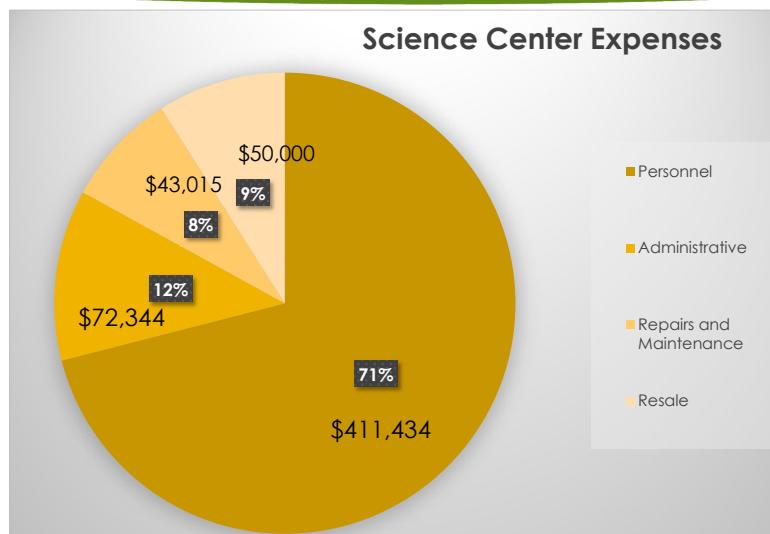
**Lauren Fike**  
Center Supervisor

**Ashe Barker**  
Marketing Specialist

**Kayla Valasquez**  
Customer Service Rep.

**Customer Service Reps**  
Several PT

## Budget FY 2024-25 \$576,793



### Personnel

3 FT, several PT

### Repairs/Maintenance

Equipment, repairs, utilities, supplies

### Administrative

Software, marketing, training

### Resale

Merchandise and parties

### Revenue Streams

Admissions	\$350,000
Parties/rentals	\$15,000
Merchandise Sales	\$50,000
Tourism Allocation	TBD

## Monroe Science Center Moving Forward

**Significant accomplishments and ongoing actions over the next year include:**

- Received two new exhibits and continued partnership with UNC Charlotte for the construction of another exhibit
- Successful run of first travelling exhibit “The Rainforest” and plans in place for the installation of second travelling exhibit in March “Motion Mania”
- Ongoing outreach to school and youth groups for events and activities
- Work to develop mobile traveling exhibits that can be taken off site to schools and other locations
- Considering a campaign to raise money to bring animal exhibit to the Science Center in summer of 2026 (animal exhibit would potentially consist of a sloth, koala, tortoise...)

## Monroe Aquatics and Fitness Center

# MAFC Overview

The Monroe Aquatics and Fitness Center is proud to offer individuals and families an outstanding variety of fitness, aquatic, and wellness programs to meet health and recreational needs. Our goal is to give members of all ages the right tools for building positive and long-lasting healthy lifestyles.

## City of Monroe Mission Statement:

The City of Monroe is committed to providing reliable, responsible, quality service to our customers at the lowest reasonable cost. We accomplish this through professional and courteous service consistent with making Monroe a vibrant and progressive community.

# Responsibilities

## Director

- Responsible to the City Manager's Office for conducting the overall operation of MAFC
- Exercises general supervision over MAFC employees

## Superintendent

- Manages day-to-day operations of the MAFC and ensures all policies and procedures are followed
- Oversees staff and develops programming
- Oversees facility and interacts with community, developing relationships and partnerships to increase usage.

## Supervisors

- Fitness Division, Aquatics Division, Facility Maintenance Division, Marketing/Membership Division,  
Programs Division

## Various Positions

- Child care, instructors, housekeeping, juice bar, and attendants

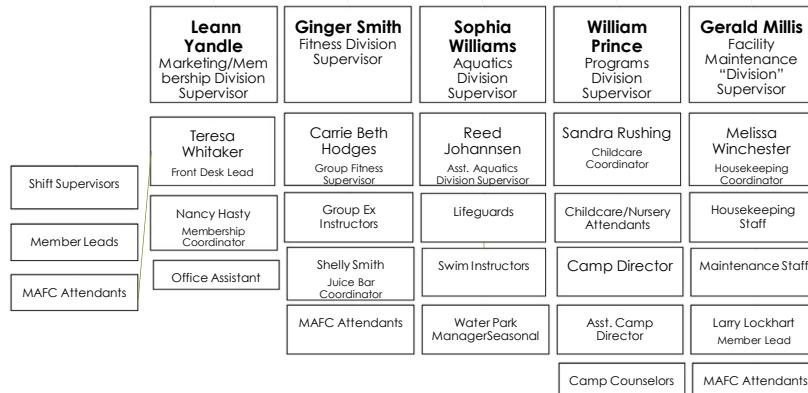
## Parks, Recreation and Tourism Monroe Aquatics and Fitness Center Org Chart

### 11 FTE, Several PT

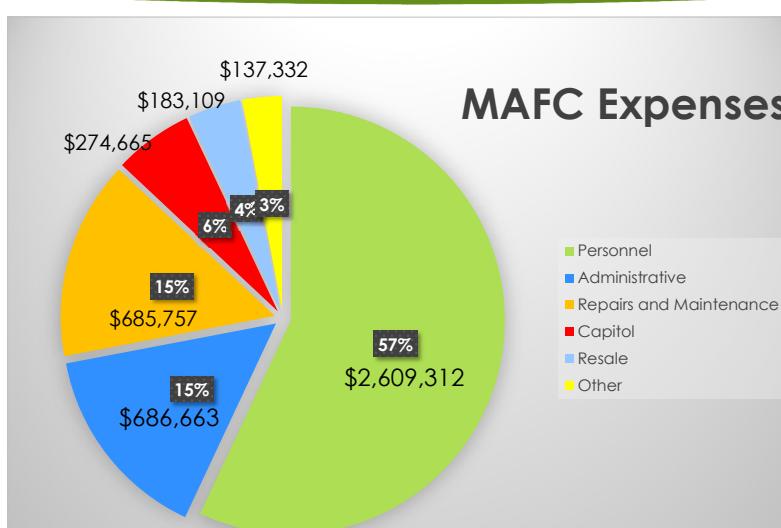
Superintendent  
Marketing/Membership  
Fitness Division Supervisor  
Aquatics Division Supervisor  
Program Division Supervisor  
Facility Maintenance  
Supervisor  
Front Desk Lead  
Membership Coordinator  
Group Fitness Supervisor  
Asst. Aquatics Supervisor  
Housekeeping Coordinator  
Hundreds of part-time and  
seasonal employees

**Pete Hovanec**  
Parks, Recreation and Tourism Director

**Leann Yandle**  
Interim Superintendent



## Budget FY 2024-25 \$4,577,742



### Personnel

11 FT, several PT

### Repairs/Maintenance

Equipment, repairs, utilities, cleaning

### Capital

Purchases

### Administrative

POS Software, marketing, training, bank fees, allocation

### Resale/Camps/Events

Merchandise and supplies

## Budget – Revenues FY 2024-25 \$4,577,742

Revenue Source	Amount
Memberships Dues	\$3,870,240
Day Camp Fees	\$90,000
Investment Earnings	\$82,263
Juice Bar/Merchandise	\$81,800
Guest Fees	\$80,000
Swim Lessons	\$45,000
Joining Fees	\$40,000
Facility Rentals	\$22,400
Adult Trips	\$11,000
Membership Changes	\$10,500
Special Programming	\$7,800
Fixed Asset Sales	\$3,790
Fund Balance Appropriation	\$278,271

## MAFC Capital Requests for Next Year \$426,500

Below is the list of Capital Equipment requests:

Capital Need	Cost
HVAC Replacement	\$67,000
Treadmill Placements (8)	\$47,000
Pool Liner Removal/Re-plaster	\$150,000
Entrance Door Replacements	\$25,000
Locker Room Paint/Counters	\$30,000
Locker Room Floors (Includes Showers)	\$99,000
Steam Generator	\$8,500

## MAFC Moving Forward

**Significant accomplishments and ongoing actions over the next year include:**

- Completed installation of new flooring, paint and general décor throughout public facing areas
- Increased memberships with a focus on reaching pre-COVID numbers
- Improvements to the locker rooms, improving cleanliness, overall appearance and functionality
- Appropriate repair of pool liner system that has been in disrepair for several years
- Replacement of original entrance doors to improve access and accessibility
- Customer service-focused training
- Continued community outreach and partnerships

## Parks and Recreation Athletics and Community Centers

# Parks and Recreation Overview

The Monroe Parks and Recreation Department strives to provide quality recreation facilities and programs that promote healthy and active living opportunities for our residents. We offer a variety of activities for all ages and fitness levels. At our facilities, you can enjoy golf, swimming, athletic programs and leagues, fitness classes, senior programs, and much more. Day camps, after-school, and educational programs are offered year-round at many of our facilities. Spend some time in one of our parks picnicking and enjoying one of our many playgrounds with your children. Explore our downtown area as you enjoy a walk or run on the Bearskin Creek and Downtown Connector Greenways. Or, if you prefer indoor activities, our Aquatics and Fitness Center has something for everyone. Sign up for a membership and start your journey to a healthier life today.

# Responsibilities

## Director

- Responsible to the City Manager's Office for conducting the overall operation of P & R.
- Exercises general supervision over Parks and Recreation employees.

## General Manager

- Manages day-to-day operations the Community Centers, Athletics and Senior Center, and ensures all policies and procedures are followed.
- Oversees staff and develops programming.

## Athletic Division Supervisor

- Oversees operations or youth and adult athletics as well as special events.

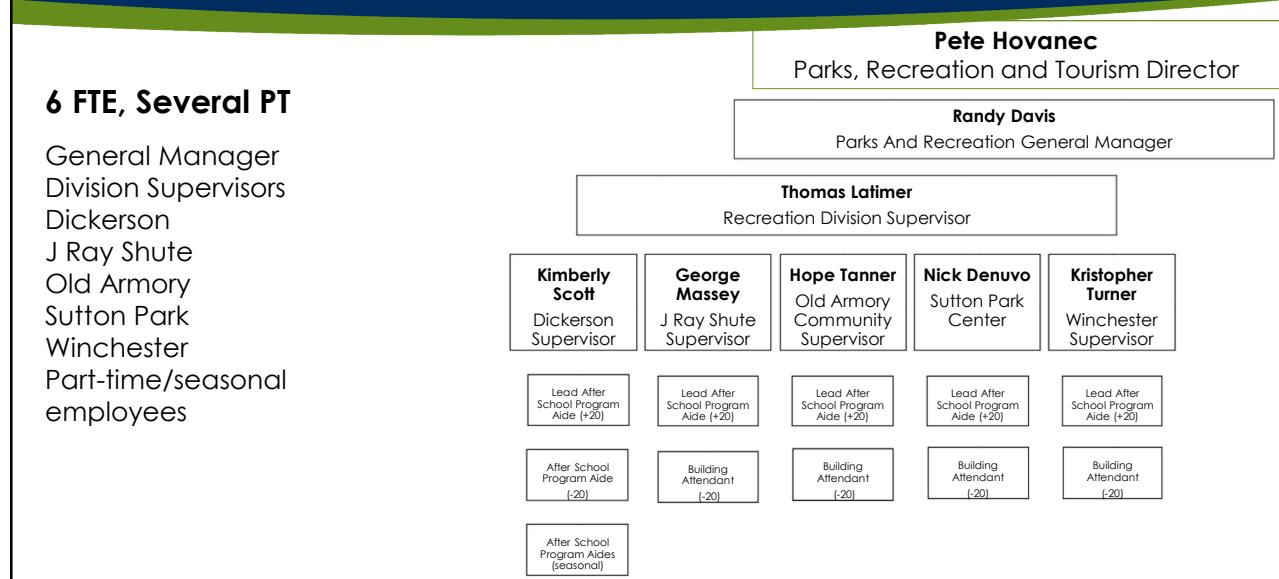
## Recreation Division Supervisor

- Oversees operations of five community recreation centers.

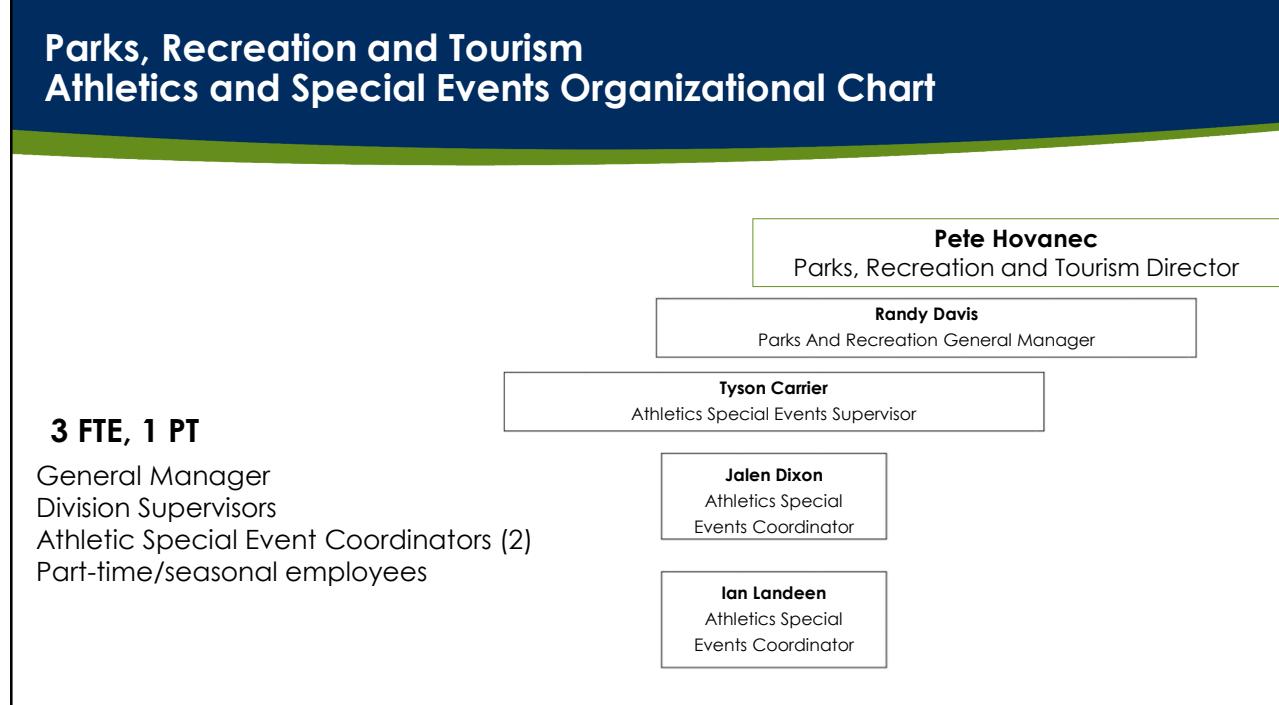
## Community Center Supervisors

- Oversees facility and interacts with community, developing relationships and partnerships to increase usage.

## Parks, Recreation and Tourism Community Centers Organizational Chart



## Parks, Recreation and Tourism Athletics and Special Events Organizational Chart



## Parks, Recreation and Tourism Bazemore Active Adult Center Organizational Chart

### 3 FTE, 1 PT

General Manager  
Center Supervisor  
Assistant Center Supervisor  
Administrative Assistant  
Part-time instructors/attendants

**Pete Hovanec**  
Parks, Recreation and Tourism Director

**Randy Davis**  
Parks And Recreation General Manager

**Aleshia Holland**  
Senior Center Supervisor

**Assistant Senior Center Supervisor**  
Mary Blythe Chipman

**Administrative Assistant 1**  
Leah Greene

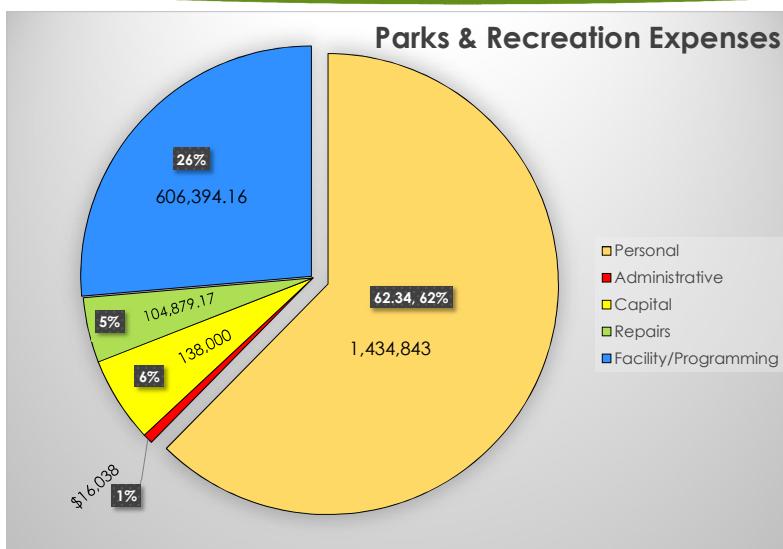
**Custodian (+20)**  
Moses Hernandez

Pottery Instructor (-20)

Clerk – Senior Center (-20)

Class Instructors (-20)

## Budget FY 2024-25 \$2,300,154.33



### Personnel

13 FT, several PT

### Administrative

Software, Bank, training

### General

Supplies, Furniture, uniforms, and other

### Other/Capital/Repairs

Purchases, Equipment utilities

### Facility/Events/Programs

Afterschool, Trips, Special Events, Camps, Athletics, and Sports Programs

### Revenue Streams

- Rental Fees \$35,000
- Afterschool/Camps \$156,000
- Athletics fees \$40,000
- MISC \$40,000

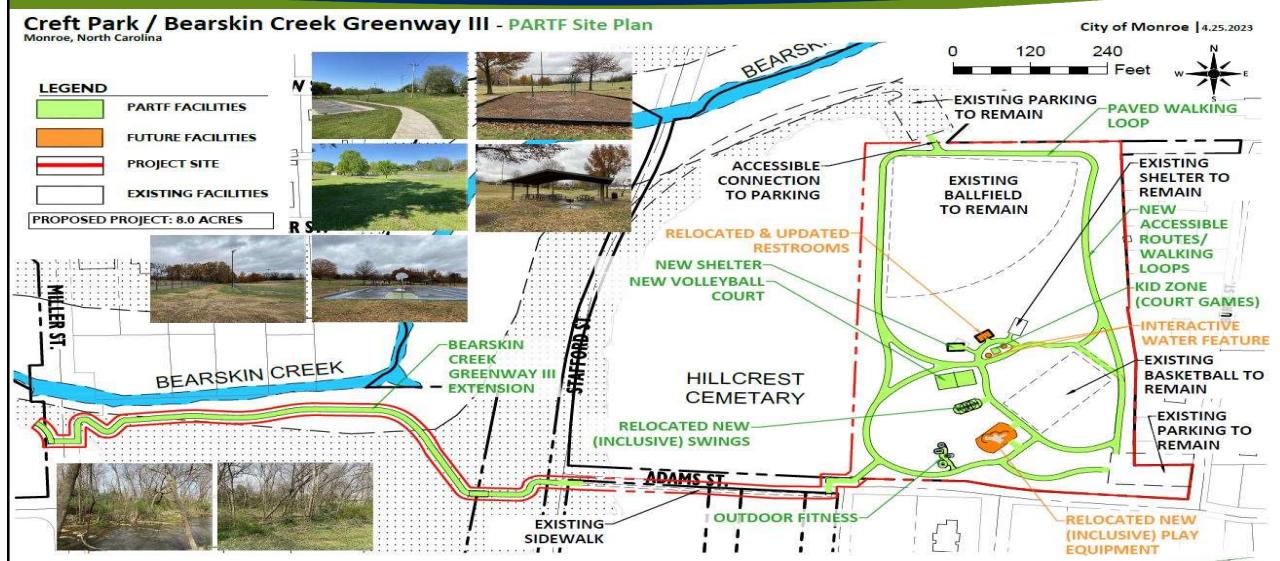
# Parks and Recreation Current Projects

Significant accomplishments and ongoing actions over the next year include:

Project Description	Adopted Amount
Basketball Goal Replacements	\$54,000
Community Center Gym Floor Replacements	\$385,000
Flooring Dickerson	\$7459
Flooring J Ray Shute	\$12,837
Flooring Old Armory	\$16,270
Flooring Winchester	\$11,985
Painting at Community Centers	\$25,000
Push Bar Alarm Dickerson	\$1,530
Winchester Gym Bleacher Replacements	\$70,000
Winchester Sun Room Replacement	\$40,000

Project Description	Adopted Amount
Dickerson Weight Room Flooring	\$10,000
Window Repair Old Armory	\$2,500
Window Tint Dickerson	\$3,340
Window Tint J Ray Shute	\$1,704
Window Tint Sutton Park	\$4,770
Window Tint Winchester	\$10,000
Pickle Ball Courts Dickerson	\$135,000
Weight Room Equipment	\$17,000
Misc. Gym Up fits	\$70,000

## Bearskin Creek - Creft Park project



# Bearskin Creek Greenway - Creft Park Costs

Creft Park		Bearskin Creek Greenway	
Item	Cost	Item	Cost
Demolition and Mobilization	\$26,500.00	Demolition	\$16,000.00
Grading and Erosion Control Measures	\$106,500.00	Grading and Erosion Control Measures	\$141,777.50
Parking and Sidewalk	\$276,980.00	Paving & Site Items	\$135,310.00
Utilities	\$5,000.00	Signage and Amenities	\$1,600.00
Storm Drainage	\$8,430.00	Utilities	\$5,000.00
Park Structures	\$120,000.00	Storm Drainage	\$0.00
Site Furnishings and Amenities	\$105,600.00	Contingency	\$100,000.00
Landscaping	\$8,000.00	Probable Total Construction Budget - Including Contingency	\$399,687.50
Multi Use Sport Area	\$26,900.00	Bearskin Creek Boardwalk	
Contingency	\$100,000.00	Item	
Probable Total Construction Budget - Including Contingency	\$783,910.00	Base Bid - Boardwalk	\$391,400.00
		Alternate 1 - Boardwalk - Does not Include Easement Costs	\$462,570.00
		Culvert	\$72,600.00
<b>Total Construction Budget Estimate (Creft Park)</b>	<b>\$940,692.00</b>	**Contractor OHP, General Conditions, Inflation, and Insurance - 20%	
<b>Total Construction Budget Estimate (Bearskin Creek Greenway)</b>	<b>\$479,625.00</b>		
<b>Total Construction Budget Estimate (Culvert)</b>	<b>\$87,120.00</b>		
<b>Total Construction Budget Estimate</b>	<b>\$1,507,437.00</b>		

## Questions?

Thank you for your time and support!

Budget Work Session  
March 3, 2025

Monroe Parks, Recreation & Tourism

# **City of Monroe Downtown Office**

Budget Work Session  
March 3, 2025



## **Presentation Outline**

1. Mission
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Recent Organizational Changes
6. Noteworthy Activities and Upcoming Budget Needs

## Mission Statement

To recognize, revitalize, preserve, and promote the historic, cultural, social, and economic significance of Monroe's Downtown.

### Culture Statement

**Experience Authentic Monroe:**

**Come for the History, Stay for the Growth, Monroe is waiting to welcome you!**

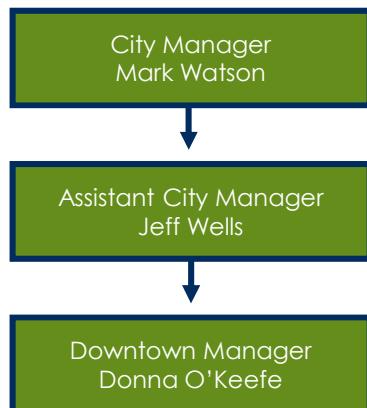
Immerse yourself in the rich history, exciting growth, and the unforgettable experience of our vibrant city.

Where every block has a unique story to tell that blends the perfect mix of tradition and progress, all served with a generous helping of southern hospitality.

## Downtown Responsibilities

- Promote, support, and advocate for downtown
- A central communication hub to downtown businesses, property owners, appointed committees, and elected body
- Administer Downtown Incentive Grants
- Maintain the Main Street Program requirements
- Market and promote downtown economic development
  - Recruiting new businesses
  - Supporting existing businesses
- Serve as a liaison to City of Monroe Departments
- Manage or assist in downtown promotional events
- Downtown Advisory Board staff liaison

## Organizational Chart

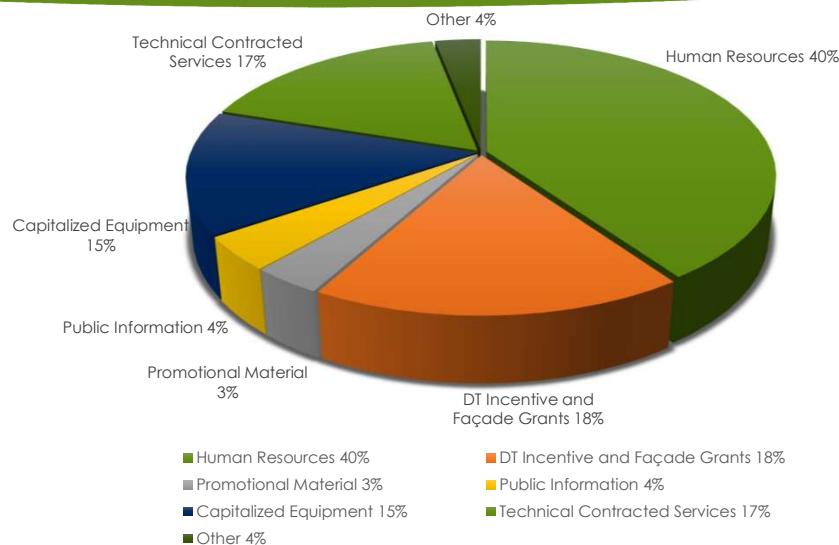


## Downtown Total Budget

FOR 2025 01							
ACCOUNTS FOR:	ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
210 Downtown Monroe Inc.	409,074	2,734	411,808	18,937.32	2,733.75	390,136.68	5.3%
TOTAL Downtown Monroe Inc.							
TOTAL REVENUES	-74,143	0	-74,143	.00	.00	-74,143.00	
TOTAL EXPENSES	483,217	2,734	485,951	18,937.32	2,733.75	464,279.68	



## Downtown Expenditures: Major Categories of Spending



## Downtown Recent Organizational Changes FY25

- October 2024 Downtown Manager was added

# Noteworthy Activities and Upcoming Budget Needs

## Main Street Program

- Reboot the Main Street Program
- Establish a Main Street program of work that includes: vision, mission, economic development strategies

## Downtown Improvements Funded

- Furnish Morgan/Windsor Alley
- Light pole replacement
- Wireless speaker system installation

## Downtown Development

- Downtown Master Plan
- Analyze existing district boundaries
- Update Downtown Economic Incentive Grant programs

## Downtown Operations and Communications Hub

- Office renovation; create a welcoming place for the public that includes 3 offices, conference room, bathrooms, storage and breakroom
- Grow Downtown's Social Media Presence
- Establish Quarterly Meetings with Downtown Businesses

# Questions?

Thank you for your time and support!

Budget Work Session  
March 3, 2025



# **City of Monroe Finance Department**



## **Outline**

1. Mission
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Recent Organizational Changes
6. Noteworthy Activities and Upcoming Budget Needs

## Vision/Mission

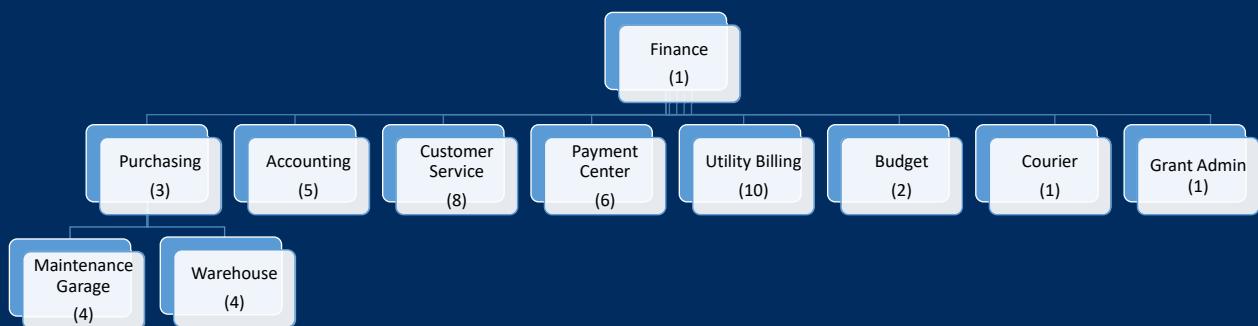
### Vision-

The Finance Department strives to provide quality services and cost effective financial practices with both accuracy and transparency thus ensuring the continued growth and economic success of the City of Monroe, its citizens and surrounding communities.

### Mission-

The City of Monroe is committed to providing reliable, responsive, quality service to our customers at the lowest reasonable cost. We accomplish this through professional and courteous service consistent with making Monroe a vibrant and progressive community.

## Finance Organizational Chart



45 Full Time Employees  
1 Part Time <20

## Responsibilities

### Fiscal Services

- Accounting
- Accounts Payable
- Payroll
- Budget
- Financial Statements
- Debt Management
- Cash Management
- Internal/External Reporting
- Grant Management
- Compliance

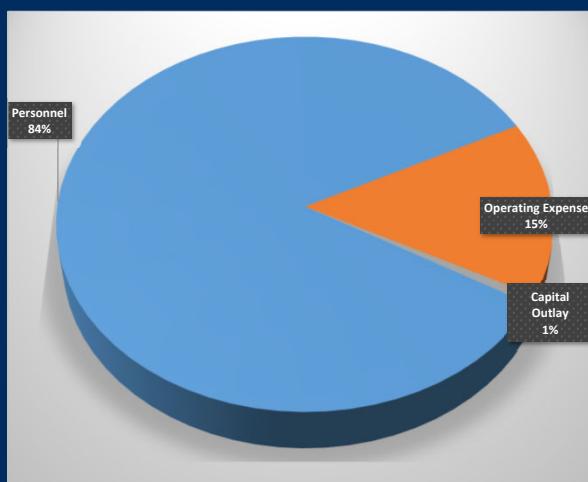
### Administrative Services

- Purchasing
- Bid Management
- Contract Management
- Warehouses
- Maintenance Garage
- Surplus Equipment

### Utility Billing and Collection

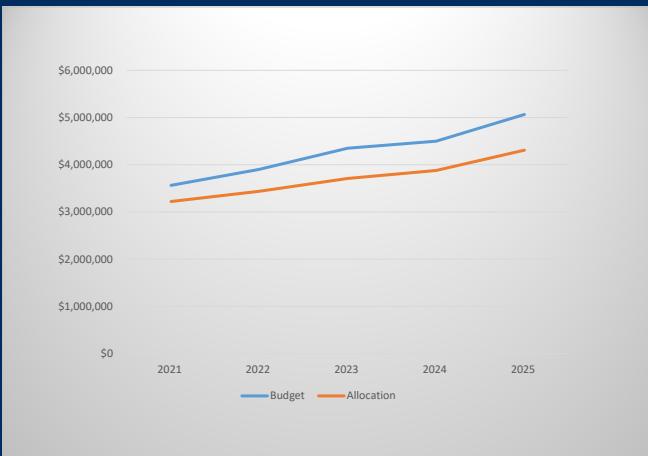
### Tax Billing and Collection

## Budget Fiscal Year 2024-2025



Personnel	4,265,373
Operating Expense	762,334
Capital Outlay	38,000
Allocations	(4,309,996)
<b>Total Finance</b>	<b>755,711</b>

## Finance Budget History FY 2021-2025



## Recent Budget and Organizational Changes

### Fiscal Year 2025

- Addition of 1 new FTE – Customer Service
- Addition of 1 new FTE – Payment Center
- Addition of 1 new FTE – Utility Billing
- Addition of 1 new FTE – Purchasing

### Fiscal Year 2023

- Addition of 1 new FTE – Grant Administrator
- Upgrade Budget Analyst from PT to FT

## Current Projects

- Two Bond Issuances in 2025
  - Limited Obligation Bond
  - Revenue Bond
- Construction of new warehouse and purchasing offices in connection with Energy Services
- Redesign Budget Book
- Implementation of City Works work order program
- Implementation of AMI metering

## Upcoming Needs

- New Garage Facility
- Addition of 1 FTE – Budget Analyst
- Addition of 1 FTE – Accounting Manager

## Questions?

Lisa Strickland  
Finance Director

Ashley Ivey  
Assistant Finance Director

# **City of Monroe Human Resources Department Overview**

Human Resources 03/03/2025



## **Outline**

1. Mission
2. Responsibilities
3. Key Performance Indicators (KPIs)
4. Organizational Chart
5. Budget Information
6. Recent Organizational Changes
7. Noteworthy Activities and Upcoming Budget Needs

## Human Resources Mission

The Human Resources Department of the City of Monroe is committed to fostering a high-performing, inclusive, and service-oriented workforce dedicated to enhancing the quality of life for our employees and the community we serve. We strive to attract, develop, and retain a diverse and talented workforce by promoting fairness, integrity, and professionalism in all aspects of human resources management.

Our mission is to support the City of Monroe's goals by providing strategic leadership in talent acquisition, employee relations, professional development, and organizational effectiveness. We are dedicated to ensuring a safe, equitable, and supportive work environment that encourages growth, engagement, and innovation. Through collaboration, compliance, and continuous improvement, we aim to cultivate a workplace culture that values respect, accountability, and excellence, empowering employees to deliver exceptional public service.

## Responsibilities

The Human Resources Department for the City of Monroe is responsible for managing key functions that support the city's workforce, ensuring compliance, efficiency, and employee well-being. The department's core responsibilities include:

- ❖ Talent Acquisition & Workforce Planning
- ❖ Employee Relations & Engagement
- ❖ Compensation & Benefits Administration
- ❖ Training & Professional Development
- ❖ Performance Management
- ❖ Compliance & Policy Development
- ❖ Employee Recognition & Retention
- ❖ HR Data Management & Reporting
- ❖ Risk Management
- ❖ Safety and Health

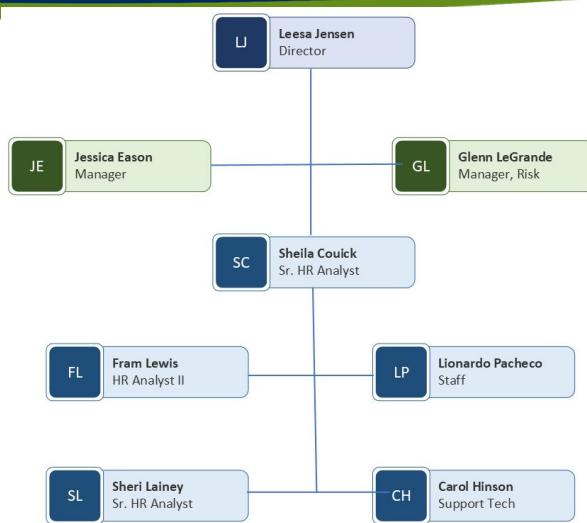
## Key Performance Indicators (KPIs)

1. Employee Retention & Satisfaction
2. Recruitment & Hiring Efficiency
3. Workforce Productivity & Performance
4. Workforce Management
5. HR Cost Management
6. Compliance and Workplace Risk & Safety
7. Workplace Diversity Programs

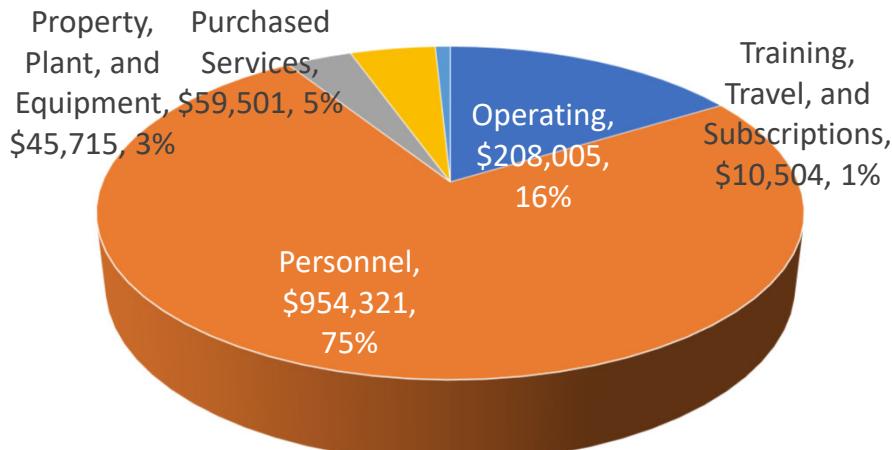
## Human Resources Organizational Chart

6 FTE and 2 PTE

HR Director
HR Manager
Sr. Human Resources Analyst
Human Resources Analyst II
Human Resources Analyst II
Risk Manager
Sr. Human Resources Analyst PTE
HR Support Tech I PTE



## Budget FY 2024-25 \$1.2M



## Upcoming Budget Needs \$103k

- Recruitment Module \$9,000
- Employee Self Service to Employee Access \$6,000
- Learning Management System to deploy City Safety and Health Platform \$35,000
- City Organizational Training & Development \$30,000
- Department Training & Development of Current Staff \$23,000

## Questions

# **City of Monroe Fire Department**

## **Department Overview**

Fire Department 3/3/2024



### **Outline**

1. Vision / Mission / Core Values
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Recent Organizational Changes
6. Noteworthy Activities
7. Upcoming Budget Needs

# Vision/Mission/Accomplishments

## Mission-

Monroe Fire Department's mission is to protect life and property in our community through a personal commitment in all services provided.

## Vision-

Monroe Fire Department's Vision is to continue to fulfill our personal and organizational commitment to protect life and property in the City of Monroe, while living our core values in all that we do. This vision will only become reality by dedicating ourselves to service, embracing history, living for our future, and pursuing excellence in all that we do.

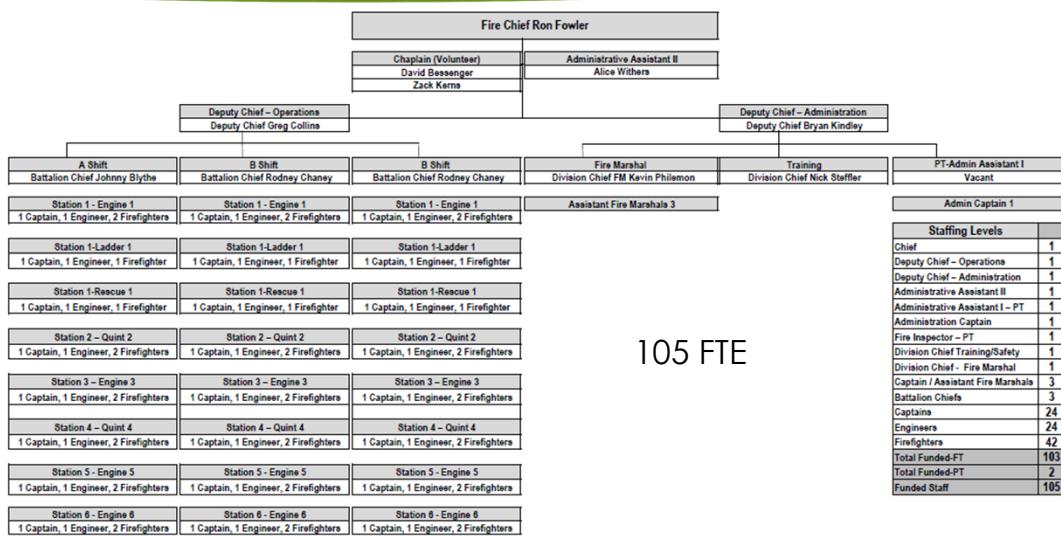
## Core Values-

Safety, Integrity, Professionalism, Compassion, Teamwork, Respect, Customer Service  
Honor

## • Noteworthy Activities

- Achieved Class 1 ISO rating
- Maintained Accredited Agency Status
- Opened Fire Station 6 in temporary facility
- Received staffing to begin separation of Ladder / Rescue

# Fire Department Organizational Chart

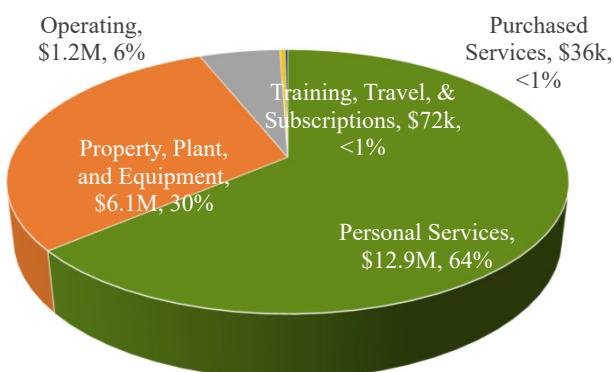


# Responsibilities

## Core Services:

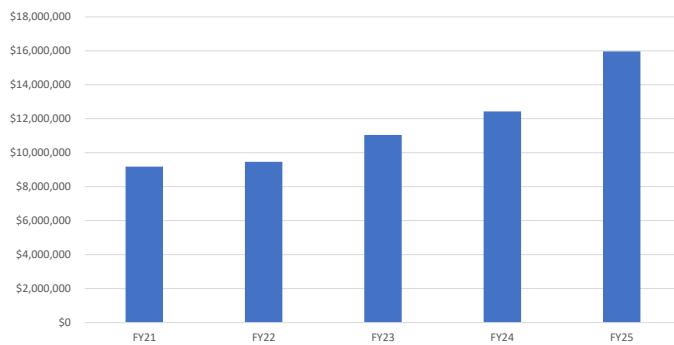
- Fire Prevention
- Public Education
- Fire Investigation - Origin and Cause
- NC State Fire Code Administration
- Emergency Management and Domestic Preparedness
- Fire Suppression
- First Responder Emergency Medical Services
- Technical Rescue (Vehicle Extrication, Swift Water, High Angle, Confined Space)
- Hazardous Materials Mitigation
- Aircraft Rescue and Firefighting

# FY 2024-25 Authorized Budget



1. Property, Plant, & Equipment includes Quint 2 Purchase
2. Prior Year Carryforward for passenger vehicle purchases
3. Personal Services includes \$500k in Overtime
4. Operating includes uniforms, vehicle maintenance and fuel, supplies, and other incidentals
5. Purchased Services – HVAC Contract for Preventive Maintenance

## Historical Expenditures and FY 2024-25



1. Average of 17% annual increase
2. Actuals for prior years and current FY 2024-25 Authorized Budget

## Recent Organizational Changes

### FY 2023-25

- Reclassified 1 PT Data Analyst position to 1 FTE Administrative Captain position
- Addition of 12 FTE positions to open Fire Station 6
- Addition of 6 FTE to split Ladder / Rescue companies



## Budget Needs \$596,238

### Capital Request / Replacements:

- Replace/Repair Station 1&2 Front Aprons: (non-capital) \$110,000
- Capital Replace Thermal Imaging Cameras (4): \$25,000
- Capital Replace Portable Radios (6): \$50,000

### Capital Request / Strategic:

- Ladder Rescue Vehicle Extrication Rescue Tools: \$38,405
- Engine Company Vehicle Extrication Rescue Tools: (5) \$78,000
- Associated Capital for new and replacement vehicles (2) \$164,000
- Operations Costs for new FTEs \$130,833
- \*\*\*Fire Engine #3 \$1.2M; \$250k annual debt service\*\*\*

## Budget Needs \$414,673

### Personnel Request:

- 6 Firefighters for Ladder/Rescue: (2 per shift); only with receipt of the SAFER (Staffing for Adequate Fire and Emergency Response) federal grant; for all six last quarter of the year \$134,673
- 1 FTE Assistant Chief Operations \$165,000
- 1 FTE Business Manager \$115,000

## Questions

# **City of Monroe Police Department**

## **Department Overview**

Police Department 12/31/2024



### **Outline**

1. Mission
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Recent Organizational Changes
6. Noteworthy Activities and Upcoming Budget Needs

## Vision/ Mission

### Vision-

Our motto is “Policing through Community Partnerships,” and our goal is to provide quality customer service through our interactions with the public. The Monroe Police Department is committed to providing exceptional public safety services and taking a leadership role in building strong community partnerships. The men and women of the department subscribe to core values including honesty, integrity, accountability, ownership, consistency, fairness, creativity, innovation, a positive attitude, teamwork, and a strong work ethic. It is important for us to be connected to the community we serve.

### Core Values-

Integrity  
Honesty  
Professionalism  
Dependability  
Treating all persons with Equality, Dignity, and Respect

### Mission-

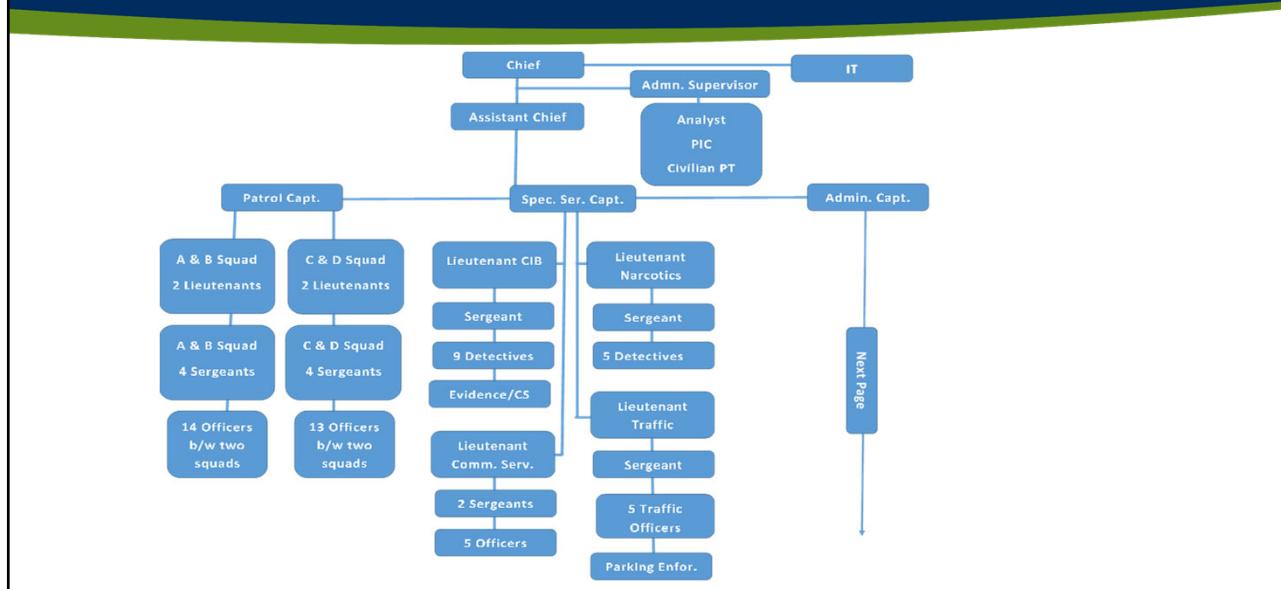
The Monroe Police Department strives to improve the quality of life of those we serve. It is our primary goal to maintain a secure environment with equal protection under the law for all of our citizens. By developing a partnership with the community, we will provide dedicated service for all persons living, working, and visiting within the City of Monroe.

## Responsibilities

- Providing exceptional public safety services
- Building strong community partnerships
- Handling daily patrol activities (patrolling streets, responding to emergencies, and preventing crimes)
- Maintaining a secure environment with equal protection under the law for all citizens
- Conducting property management and public communication
- Enforcing laws, mediating disputes, directing traffic, assisting during emergencies, conducting community outreach, and providing support during public events

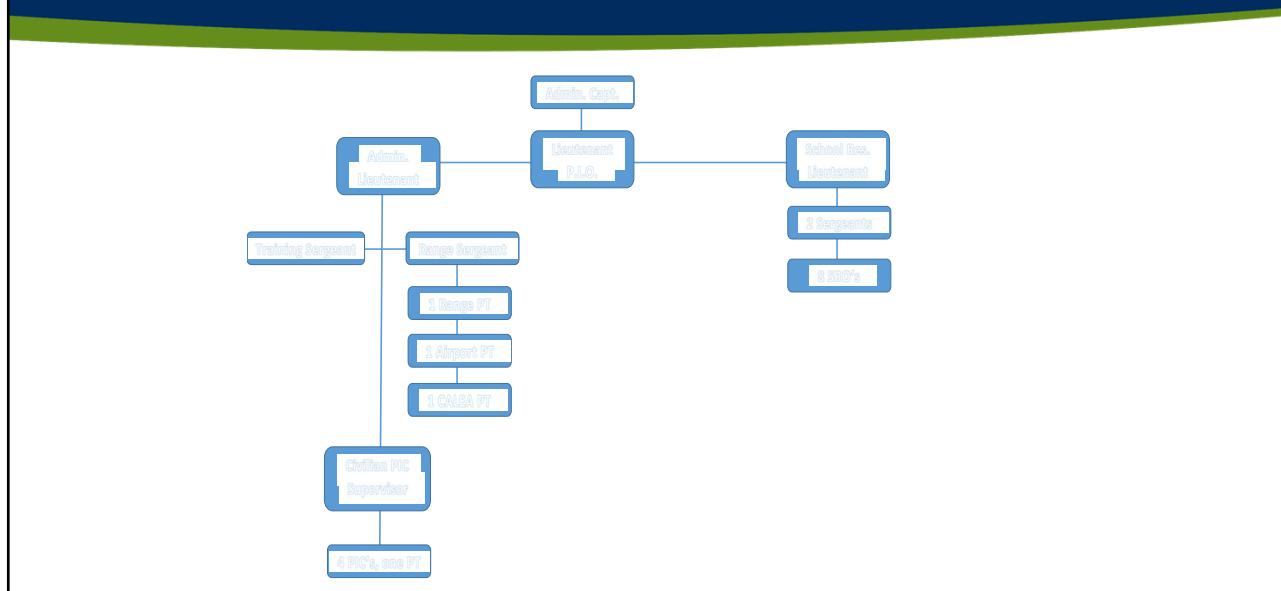
# Police Department Organizational Chart

(1 of 2)

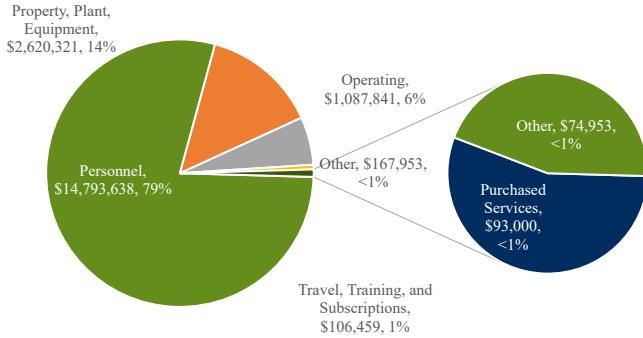


# Police Department Organizational Chart

(2 of 2)

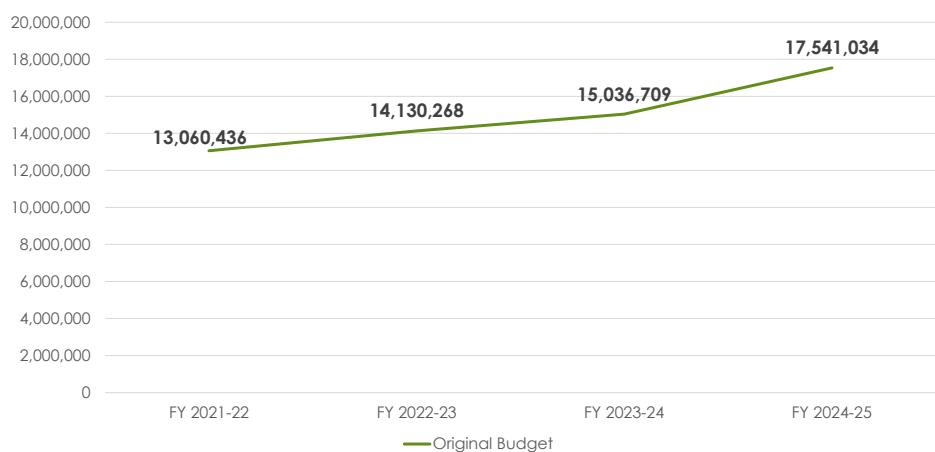


## Budget Composition FY 2024-25 \$18.7 M Authorized Budget



Requirements	\$18,776,221
Receipts	\$74,953
Net Appropriations	\$18,701,258
FTE Positions	107

## Budget FY 2024-25



## Recent Organizational Changes

### FY 2024-25

- Addition of 4 new –Police Officer (positions to be filled 01/25)
- Reclassification one position to Assistant Chief (position filled 4/24)
- Reclassification of one position to Public Information Officer (position filled 4/24)
- Reclassified one position to Patrol Lieutenant

### TRANSFERS

Criminal Investigation Bureau, Traffic Unit, School Resource Officer, and Community Services. Transfers were made within the respective divisions.

### ASSESSMENTS/PROMOTIONS

Lieutenant Assessment- two Sergeants were promoted to Lieutenant and two officers promoted to Sergeant within the Patrol Division.

## Noteworthy Activities

### Current Initiatives

- Pay Increases – Modification of Pay Schedule (Spring 2024)
- Recruitment and Lateral Transfer Program
- Implementation of the newly formed Public Information Officer position
- Updated Equipment (Vest, Weapons, Vehicles, Axon Cameras)

## 2021-2024 Performance Measures

Input-Output-Effectiveness-Efficiency

INPUTS	2021	2022	2023	2024
Civilian Employees (avg)	11	11	11	12
Sworn Employees (avg)	91	92	90	96
Population (2014 Estimate)	34,562	34,562	37,797	37,797
Sworn Personnel per 1,000 population (avg)	2.6	2.7	2.4	2.5
Square Miles	29.76	29.76	31.07	31.07
Output	2021	2022	2023	2024
Incident Reports	7165	7361	7012	7383
Arrests/Criminal Citations	2291	2145	2035	2054
Supplements	4758	4389	3877	3939
Cases Assigned	857	874	768	723
Items of Evidence Submitted	3518	3183	2275	2531
Traffic Accidents	2236	2283	1924	2299
Traffic Citations	5445	4993	5049	6041
Field Contacts	851	854	787	962
Parking Tickets	2242	3134	1470	1679
Effectiveness	2021	2022	2023	2024
Part 1 Violent Crimes	178	175	181	195
Part 1 Property Crimes	1313	1443	1332	1317
Part 1 Violent Crimes per 1000 population (avg)	5.09	5.00	4.76	5.13
Part 1 Property Crimes per 1000 Population (avg)	37.51	41.23	35.05	34.66
Hours of training	10336	9333	7996	8809
Efficiency	2021	2022	2023	2024
Calls for Service	69059	62649	60351	64352
Officer Response or Assist	106625	107664	102318	111594
Average Dispatch Delay (avg min)	3.66	2.99	3.19	2.75
Average Travel Time Once Dispatched (avg min)	3.48	3.41	3.36	3.68
Average Service Time per Dispatched Call (avg min)	29.21	28.78	27.90	28.39

## Upcoming Budget Needs

### Increase to 1105010 424010 (Capitalized Motor Vehicles)

VENDOR/ITEM	COST	TOTAL	
Law and Order Technology LLC/In-car Computer & Equipment (x12)	\$2,942.19	\$35,306.28	
CDW Government/In-car Thermal Printer (x12)	\$367.70	\$4,412.40	
CDW Government/In-car Thermal Hardwire Cable Adapter (x12)	\$23.14	\$277.68	
Stop Sticks (x12)	\$505.00	\$6,060.00	
SignPro/Vehicle Graphics (x12)	\$675.00	\$8,100	
Motorola In-Car Radio & Equipment (x12)	\$5,524.08	\$66,288.96	
Campbell-Brown, Inc./Patrol Vehicle Equipment & Installation (x12)	\$16,090.26	\$193,083.12	
In-car Flashlights (x12)	\$155.44	\$1,865.28	TOTAL INCREASE: <b>\$911,253.72</b>
Durango Pursuit Package (x12)	\$45,484	\$545,808	
Tyler McCollum – Vehicle Equipment Installation (x12)	\$2,800	\$33,600	New Budget Amount: <b>\$1,631,253.72</b>
Vehicle Tags (x12)	\$1,371	\$16,452	

## Upcoming Budget Needs

### Increase to 1105010 468010 (Other Operating Expenses)

VENDOR/ITEM	COST	TOTAL	
Pack Track Yearly Handler Subscription (x6)	\$140.00	\$840.00	
Elite K-9 Equipment (Misc.)	\$3117.40	\$3,117.40	
Ace K9 Ace WatchDog Service (x6)	\$504.00	\$2,843.00	
United Police Work Dog Association (UPWDA ) Membership (x6)	\$125.00	\$750.00	
Ventosa K9 Kennel, Inc. K9 Replacement & Handler Training (x6)	\$13,500.00	\$81,000	<b>TOTAL INCREASE: \$88,550.40</b>
			<b>New Budget Amount: \$209,550.40</b>
			<small>*Replacements would be in stages*</small>

## Upcoming Budget Needs

### Increase to 1105010 432010 (Legal Services)

Increase requested due to new service provider.

Service provider fee of \$5,000/per month

\$1,500 to reimburse costs associated with training conference attendance

**TOTAL INCREASE: \$11,500.00**

**New Budget Amount: \$61,500.00**

## Upcoming Budget Needs

### Increase to 1105010 464050 (Subscriptions and Publications)

VENDOR/ITEM	COST	TOTAL
Flock Safety (License Plate Reader Cameras) (x10)	\$30,000.00	\$30,000.00
Paladin Drone & Livestream Package	\$9,000.00	\$9,000.00
Leads Online	\$5,145.00	\$5,145.00
CrashData Group	\$1,601.25	\$1,601.25
Callyo (Narcotics)	\$4,920.00	\$4,920.00
Thomson Reuters CLEAR (x12)	\$655.20	\$7,862.40
Cellbrite	\$7,190.00	\$7,190.00

**TOTAL  
INCREASE:  
\$65,718.65**  
**New Budget  
Amount:  
\$68,418.65**

## Upcoming Budget Needs

### Increase to 1105010 444110 (Radio Rentals)

This increase would allow for the department to purchase upgraded/updated in-car and handheld radio equipment for officers to replace ones that are going off-line or are no longer supported by Motorola. Additionally these funds would be utilized to continue to maintain telecommunications equipment within our agency console area.

This increase would allow for the department to purchase replacement batteries, shoulder mics and holsters that fail or get broken in the performance of duties.

**TOTAL  
INCREASE:  
\$60,000.00**  
**New Budget  
Amount:  
\$227,344.00**

## Upcoming Budget Needs

### **Increase to 1105010 451040 (Local Drugs)**

Criminal Investigation Related Items. Increase requested due to changes in rules related to the use of asset forfeiture funds.

This increase will allow for the Narcotics Division to utilize funds to make undercover weapon and narcotic purchases and to be able to compensate informants.

**TOTAL  
INCREASE:  
\$20,000.00**

**New Budget  
Amount:  
\$28,900.00**

## Upcoming Budget Needs

### **Increase to 1105010 456010 (Uniforms and Shoes)**

Increase in cost of uniforms, costs of uniform shirts and pants that need to be purchased in tandem with the outer carrier vests, increased costs incurred to provide training uniforms.

This increase will allow for the agency to purchase and provide the required uniforms to all personnel.

**TOTAL  
INCREASE:  
\$50,000.00**

**New Budget  
Amount:  
\$167,025.00**

## Upcoming Budget Needs

### **Increase to 1105010 461500 (Small Equipment)**

Request based on increase in ammunition costs.

This increase will allow for the agency to purchase and provide the necessary duty and training ammunition to all personnel.

**TOTAL  
INCREASE:  
\$20,000.00**

**New Budget  
Amount:  
\$337,820.00**

## Upcoming Budget Needs

### **Increase to 1105010 461500 (Small Equipment)**

Request based on increase in ammunition costs.

This increase will allow for the agency to purchase and provide the necessary duty and training ammunition to all personnel.

**TOTAL  
INCREASE:  
\$20,000.00**

**New Budget  
Amount:  
\$337,820.00**

## Upcoming Budget Needs

### **Increase to 1105010 451030 (Youth Programs)**

Increase requested due to program needs.

This increase will allow the Community Services Division and School Resource Officer Division to provide additional community and youth outreach opportunities.

**TOTAL  
INCREASE:  
\$5,000.00**

**New Budget  
Amount:  
\$10,650.00**

## Questions

# **City of Monroe**

## **Information Technology**

### **Department Overview**

Information Technology



#### **Outline**

1. Mission
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Recent Organizational Changes
6. Upcoming Budget Needs

## Vision/Mission

### Mission –

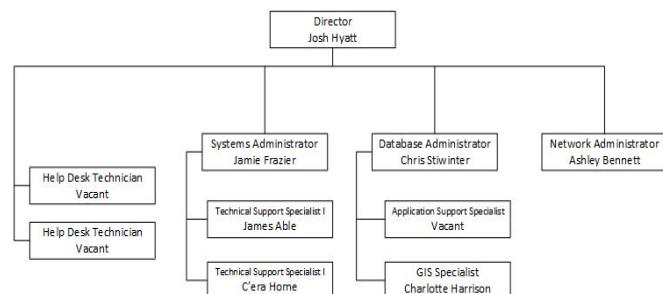
The City of Monroe is committed to providing reliable, responsible, quality service to our customers at the lowest reasonable cost. We accomplish this through professional and courteous service consistent with making Monroe a vibrant and progressive community.  
Commitment Innovation Integrity Leadership Sensitivity Teamwork

**Commitment**  
**Innovation**  
**Integrity**  
**Leadership**  
**Sensitivity**  
**Teamwork**

## Information Technology Organizational Chart

10 FTE

Director
Network Administrator
Systems Administrator
Technical Support Specialist I (2)
Database Administrator
Application Support Specialist
GIS Specialist
Help Desk Technician (2)



# Responsibilities

## IT Infrastructure Management

- Deploy, maintain, and upgrade government networks, servers, and end user devices.
- Ensure reliable internet and intranet services for government agencies.
- Manage data centers to ensure availability and resiliency.

## Technical Support & Helpdesk Services

- Provide IT support to user base within the organization.
- Troubleshoot hardware, software, and network issues.

## Disaster Recovery & Business Continuity

- Develop disaster recovery plans to ensure business continuity.
- Implement data backup and recovery solutions.
- Prepare for emergencies like cyberattacks, system failures, and natural disasters.

## Cybersecurity & Data Protection

- Implement cybersecurity measures to protect sensitive public data.
- Ensure compliance with national and international data protection laws.
- Monitor and respond to cyber threats and incidents.
- Conduct regular security audits and risk assessments.

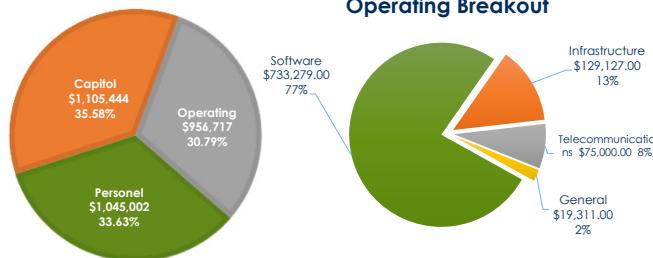
## Policy & Compliance

- Develop IT policies, guidelines, and best practices.
- Ensure compliance with IT regulations and standards.
- Promote ethical IT usage and data governance policies.

## Procurement & Vendor Management

- Oversee procurement of IT hardware, software, and services.
- Manage contracts and relationships with IT service providers.
- Ensure cost-effective and secure IT solutions.

# Budget Composition FY 2024-25 (Authorized) \$3.1M Budget

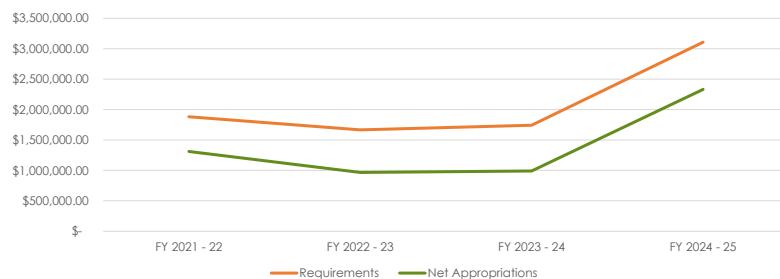


Requirements	\$3,107,263.00
Receipts	\$775,033.00
Net Appropriations	\$2,332,230.00
FTEs	10

Director
Network Administrator
Systems Administrator
Technical Support Specialist I (2)
Database Administrator
Application Support Specialist
GIS Specialist
Help Desk Technician (2)

## Budget FY 2024-25

Requirements	\$3,107,263.00
Receipts	\$775,033.00
Net Appropriations	\$2,332,230.00



## Recent Budget and Organizational Changes

### FY 2024

- Addition of two help desk positions
- Addition of Application Support position
- Replacement of Virtual Server Cluster
- Replacement of Core Switching

## Upcoming Needs – 1.1M

- Three FTEs, GIS Specialist, Application Support Specialist, and Technical Support Specialist – 435k
- Migration to Microsoft 365 – 424K
- Duo MFA Subscription – 27K
- Critical Start MDR Service – 75K
- Cyber Security Program – 50K
- Oracle High Availability Migration – 55K
- 2025 Ram ProMaster 1500 Van – 61K

## Questions

# City of Monroe Energy Services Department

Electric and Natural Gas Divisions

March 3, 2025



## Outline

1. Vision/Mission
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Noteworthy Activities and Upcoming Budget Needs
6. Recent Organizational Changes

## Vision/Mission

### Vision

Provide a sustainable future with reliable energy for residents, businesses, and industries to improve the quality of life in our community.

### Mission

We commit to be the premier customer owned and financed electric and natural gas supplier of choice to the citizens of Monroe and Union County.

Our goals are to provide high quality, safe, responsible, and reliable energy services to meet the individual needs of our customers.

We will maintain a cost effective, courteous, and customer-oriented operation to continually enhance the quality of life for our friendly home town community.

## Responsibilities

- Provide reliable energy
- Provide excellent customer service
- Employee safety
- Public safety
- Communication to City Manager office
- Manage supply and capacity agreements
- Provide cost effective energy rates
- Plan for the current and future customer energy needs
- Electric, Natural Gas, and Fiber Optic system operations and maintenance

# Organizational Chart

FTE = 78

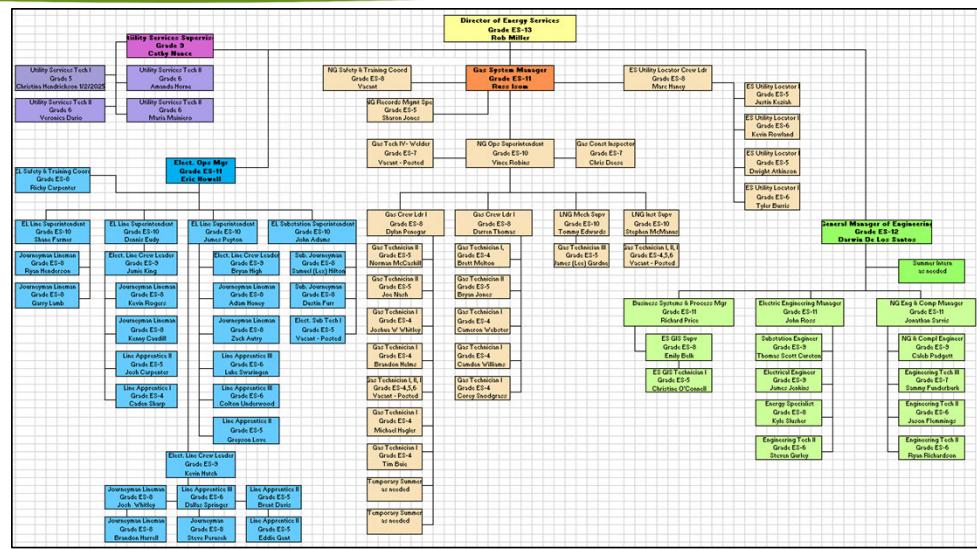
Temp = 3

Electric = 29  
FY 26 Request = +1

Natural Gas = 29  
FY 26 Request = +1

Engineering = 20  
FY 26 Request = +1

Utility Services = 5  
FY 26 Request = +1

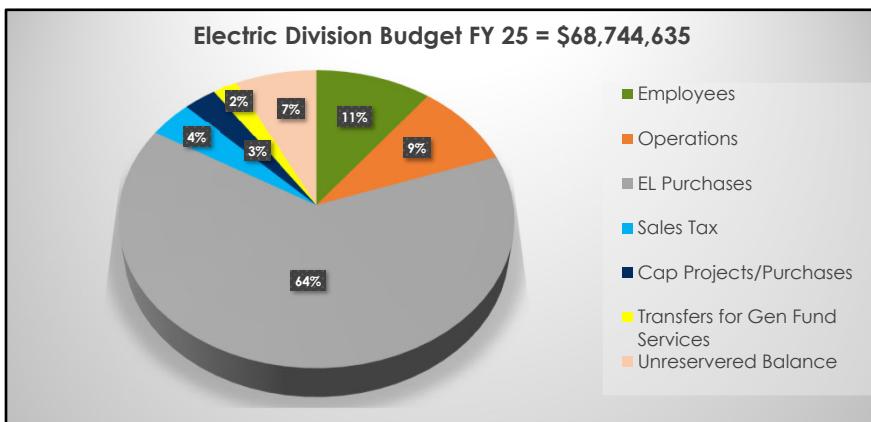


## Key Performance Indicators

Electric KPIs	FY 24
New Services Added	713
Total Outages	154
Average Response Time	25 Mins
Average Service Availability Index	99.9897%
System Average Interruption Duration Index (SAIDI)	54.36 Mins
Customer Average Interruption Duration Index (CAIDI)	86.86 Mins

Historical Services Added per Year = 200  
SAIDI for NC Co-Ops and IOUs = 130 to 200 Mins  
CAIDI for NC Co-Ops and IOUs = 95 to 212 Mins

## Electric Division FY 25 Budget



### FY 24 Customer Distribution

Residential	81%
Small Commercial	17%
Industrial	2%

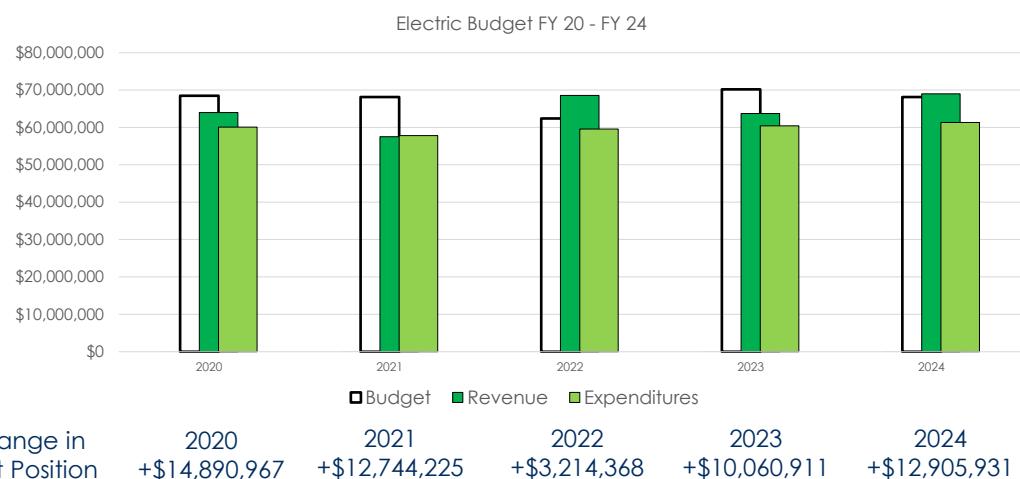
### FY 24 Load Distribution

Residential	16%
Small Commercial	6%
Industrial	78%

### FY 24 Revenue Distribution

Residential	25%
Small Commercial	9%
Industrial	64%

## Electric Division FY 20 – FY 24



## Electric Division FY 26 Ongoing CIP Requests

Account	Fund/Project	Title	Amount	Priority	Goal
5428200423010	Electric CIP EL0905	Substation Reliability/Capacity Improvements	\$550,000	High	Development continues, power capacity
5428200423010	Electric CIP EL1101	Subdivision Construction	\$1,750,000	High	Development Continues
5428200423010	Electric CIP EL1701	AMI Metering Solutions	\$250,000	High	New technology for workforce and customers
5428200423010	Electric CIP EL2001	NCDOT Relocation Projects	\$500,000	High	NCDOT planned projects
5428200423010	Electric CIP EL2002	ES SCADA System Upgrade	\$25,000	High	New technology for workforce
5428200423010	Electric CIP EL2303	Substation Modernization	\$1,000,000	High	Modernization to meet customer expectations
5428200423010	Electric CIP EL2304	Work Management System	\$100,000	High	New technology for workforce and customers

Total = \$4,175,000

## Electric Division FY 26 Vehicle/Equipment Requests

Account	Fund	Title	Amount	Priority	Goal
5408220424010	Electric CIP	New Vehicle – Electric Technical Systems Journeyman	\$75,000	High	New AMI technology and workload need
5408220424010	Electric CIP	Replace #2688, 15' Digger Derrick	\$375,000	High	Replacement per garage score
5408220424010	Electric CIP	Replace #2726, 16' Knuckleboom	\$300,000	High	Replacement per garage score
5408220424010	Electric CIP	Replace #2735, 16' Van	\$70,000	High	Replacement per garage score
5408220424010	Electric CIP	Replace #2432, 09' SUV 4WD	\$55,000	High	Replacement per garage score

Total = \$875,000

## Electric Division FY 26 Operating Requests

Account	Fund	Title	Base	Increase	Cause
5408210456010	Electric Admin	Uniforms and Shoes	\$6,235	\$1,765	Inflationary
5408220443600	Electric Ops	Repairs and Maint Substations	\$178,250	\$1,750	Inflationary
5408220443610	Electric Ops	Repairs and Maint Distib Lines	\$95,000	\$200,000	Material costs for LED light upgrades

Total Increase = \$203,515

## Electric Division FY 26 Personnel Requests

Account	Fund	Title	Amount	Priority	Goal
5408210411010	Electric Admin	Substation/Transmission Engineering Manager	\$184,190	High	Workload need to modernize substations
5408210411010	Electric Admin	Utility Services Manager	\$165,396	Medium	Workload to meet customer expectations
5408220411010	Electric Ops	Electrical Technical Systems Journeyman	\$160,470	High	New AMI technology and workload need

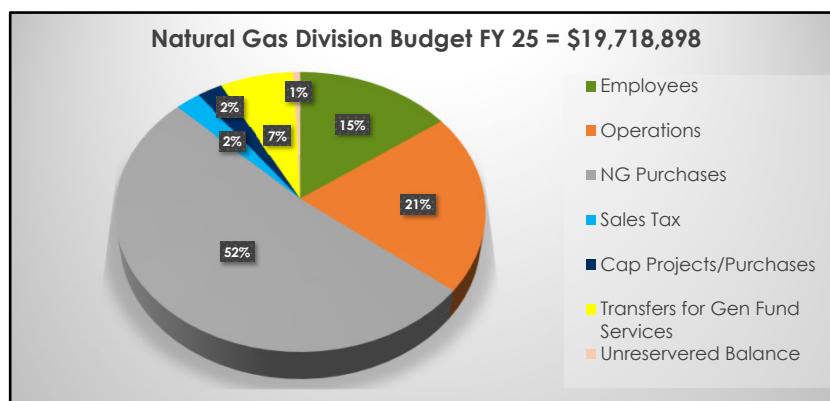
Total = \$510,056

## Key Performance Indicators

Natural Gas KPIs	FY 24
New Services Added	672
Total Emergency Responses	473
Average Response Time	20 Mins
Average Time Made Safe	28 Mins

Historical Services Added per Year = 200  
Average Response Time for IOUs = 45+ Mins

## Natural Gas Division FY 25 Budget



### FY 24 Customer Distribution

Residential	89%
Small Commercial	10%
Industrial	1%

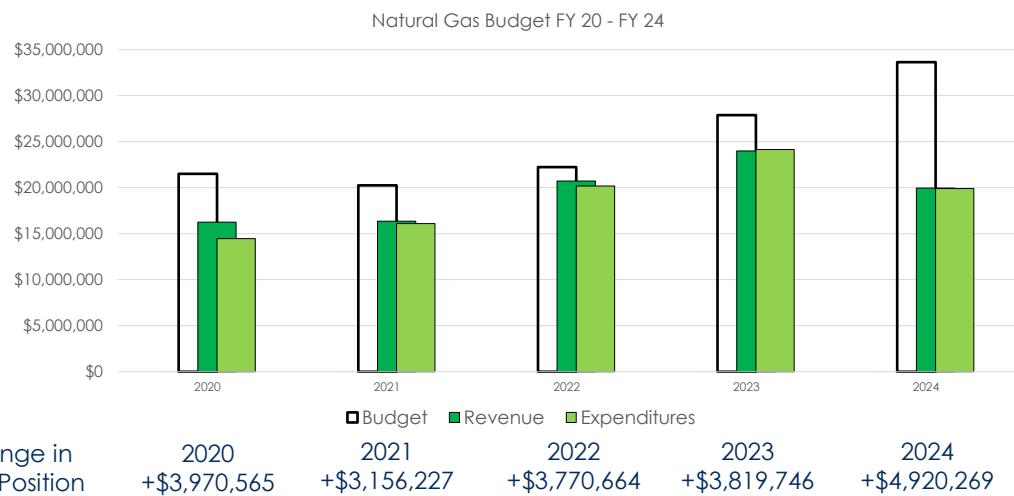
### FY 24 Load Distribution

Residential	14%
Small Commercial	14%
Industrial	72%

### FY 24 Revenue Distribution

Residential	40%
Small Commercial	31%
Industrial	29%

## Natural Gas Division FY 20 – FY 24



## Natural Gas Division FY 26 Ongoing CIP Requests

Account	Fund/Project(s)	Title	Amount	Priority	Goal
5628400423010	NG CIP NG0913,1202,1403,1502	Distribution Integrity Management, CP, Industrial PM	\$350,000	High	Federal requirements, asset management
5628400423010	NG CIP NG1401	Subdivision Construction	\$950,000	High	Development continues
5628400423010	NG CIP NG1501	Transmission Integrity Management	\$100,000	High	Federal requirements, asset management
5628400423010	NG CIP NG1503, 1701, 2101, 2201	System Reinforcement and Expansion	\$775,000	High	Planned infrastructure to reinforce system/development
5628400423010	NG CIP NG1901	NCDOT Roadway Relocations	\$500,000	High	NCDOT planned projects
5628400423010	NG CIP NG1902	AMI Metering Solution	\$500,000	High	New technology for workforce and customers
5628400423010	NG CIP NG2002, 2302, 2501	Work Management System, Software Upgrade	\$410,000	High	New technology for workforce and customers

Total = \$3,585,000

## Natural Gas Division FY 26 Vehicle/Equipment Requests

Account	Fund	Title	Amount	Priority	Goal
5608420423010	NG CIP	New Highland Supercell Electrofusion Processor	\$10,000	High	Efficiency, outfit all crews consistently
5608420423010	NG CIP	New Steel Squeeze Off Tool	\$8,000	High	Efficiency, outfit all crews consistently
5608420423010	NG CIP	New Sensit Portable Methane Leak Defector	\$20,000	High	Efficiency, outfit all crews consistently
5608420423010	NG CIP	New Cathodic Protection Equip - CIS and DCVG	\$25,000	High	Use personnel qualifications versus contractor
5608420423010	NG CIP	Replace Ditch Witch RT55 Trencher	\$225,000	High	Replacement per garage score
5608420423010	NG CIP	Replace 2000 GMC C8500 Tandem Dump Truck	\$175,000	High	Replacement per garage score
5608420423010	NG CIP	Replace Inficon Irwin #1 Gas Detector	\$30,000	High	Replacement, 3 year life cycle

Total = \$493,000

## Natural Gas Division FY 26 Operating Requests

Account	Fund	Title	Base	Increase	Cause
5608420433020	NG Ops	Mooresville	\$60,100	\$1,803	Contract - Inflationary
5608420443590	NG Ops	Repairs and Maint to LNG Facility	\$106,000	\$19,000	Inflationary
5608420443620	NG Ops	Repairs and Maint to Transmission Pipeline	\$95,000	\$20,000	Inflationary
5608420456010	NG Ops	Uniforms and Shoes	\$37,955	\$14,045	Inflationary, improved PPE

Total Increase = \$54,848

## Natural Gas Division FY 26 Personnel Requests

Account	Fund	Title	Amount	Priority	Goal
5608420411010	NG Ops	Damage Prevention Supervisor	\$127,691	High	Workload need, development continues and high volume of fiber optic projects planned for the service area

Total = \$127,691

## Recent Organizational Changes

Energy Services and Water Resources have been realigned under a General Manager and Deputy General Manager.

The Administrative Services group was reclassified to the Utility Services group in FY 24.

This accomplished specializing these positions into the specific utility functions that they perform and moves the positions from the General Fund pay grades to Energy Services pay grades for talent acquisition and retention.

## Questions



# City of Monroe Water Resources Department

March 3, 2025



## Outline

1. Vision/Mission
2. Responsibilities
3. Organizational Chart
4. Budget Information
5. Noteworthy Activities and Upcoming Budget Needs
6. Recent Organizational Changes

## Vision/Mission

### Vision

Provide reliable, responsive, quality service to our customers at the lowest reasonable cost.

### Mission

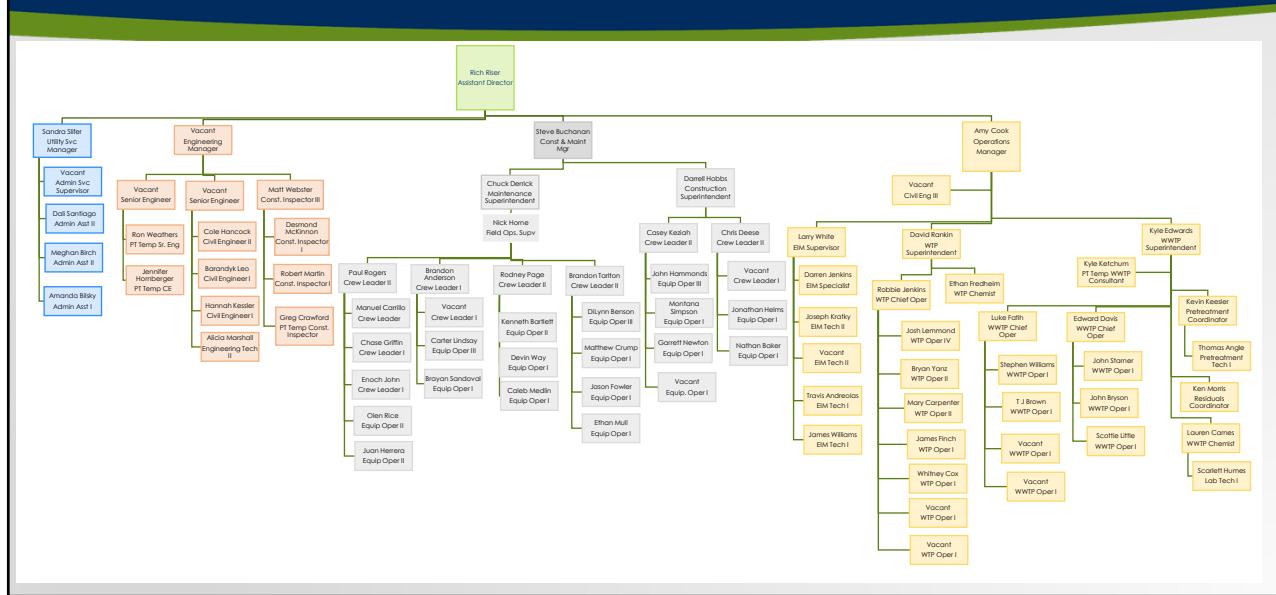
The employees of the Water Resources Department are dedicated to, and accountable for, providing friendly, efficient and cost effective water and wastewater services to the citizens of Monroe.

The employees will continuously strive for innovations, excellence, and improvement in the way we serve our customers.

## Responsibilities

- Provide reliable water and sewer service
- Provide excellent customer service
- Employee safety
- Public safety
- Communication to City Manager office
- Provide cost effective water and sewer rates
- Plan for the current and future customer water and sewer needs
- Water and Sewer system operations and collection system maintenance and repairs

# Organizational Chart



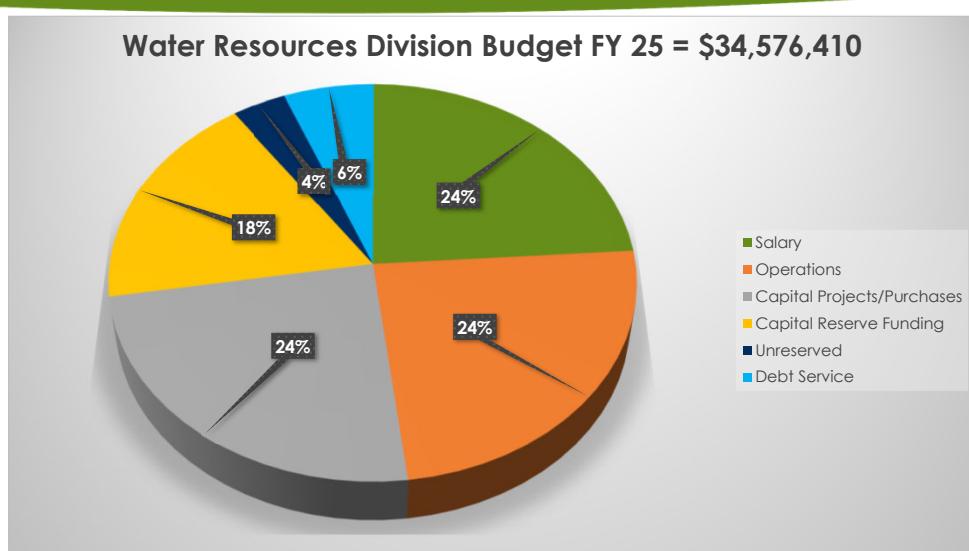
# Organizational Breakdown

- Full Time Employees = 81
- Temp = 7
- Admin/Engineering = 18 (FY 26 Request = +3)
- EIM = 7
- Maintenance = 21
- Construction = 8 (FY 26 Request = +1)
- WTP = 11 (FY 26 Request = +1)
- WWTP = 16

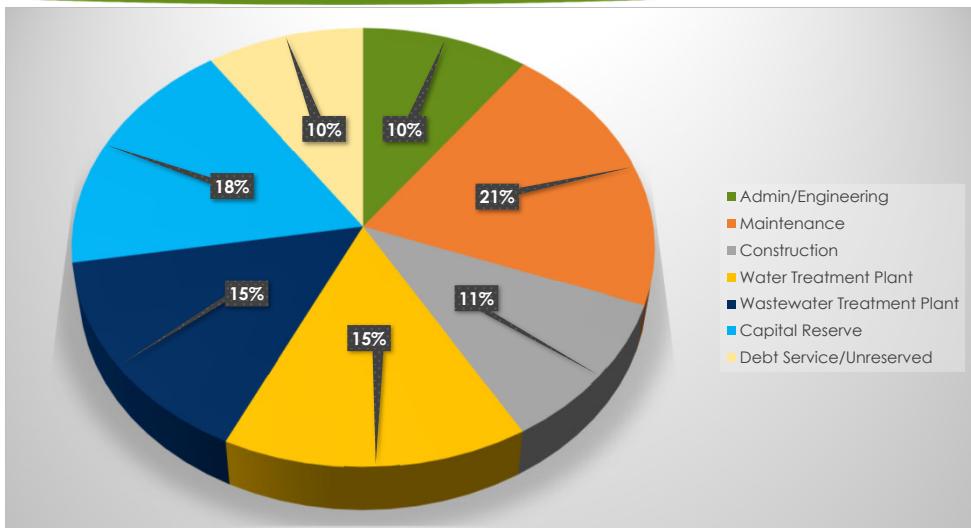
## Key Performance Indicators

Water Resources KPIs	FY 24
New Water Services Added	856
New Sewer Services Added	825
Total Sewer Line Cleaned (in feet)	149,893
Gallons of Water Treated (in millions)	2,050.35
Gallons of Wastewater Treated (in millions)	2,554.42

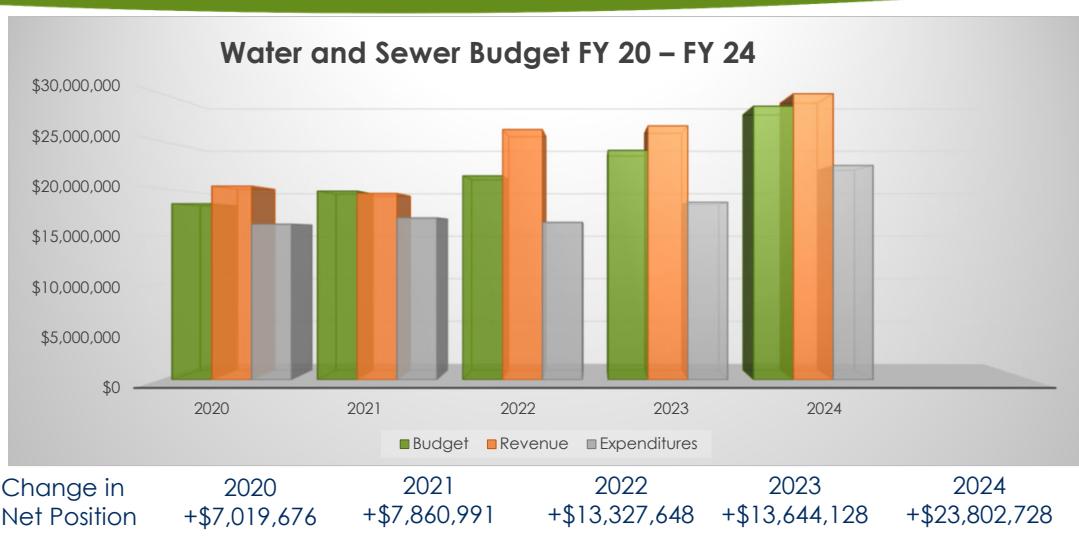
## Water Resources FY 25 Budget



## Water Resources FY25 Budget By Division



## Water Resources FY 20 – FY 24



## Water Resources FY 26 Ongoing CIP Requests

Account	Fund/Project	Title	Amount	Priority	Goal
5108010-434040	Operating	WR GIS Digitization & Records Storage	\$200,000	High	New technology and document handling
5108030-424050	Operating	Nelson Heights Tank Refurbishment & Coating	\$400,000	High	Refurbishment of existing water storage tank
5108020-424050	Operating	Goldmine Pump Station Upgrade	\$200,000	High	Upgrade systems with newer technology and to increase reliability
5108020-424050	Operating	Decommission Kimberly Pump Station and install gravity sewer	\$300,000	High	Remove obsolete pump station and replace with gravity sewer
5108040-424050	Operating	I & I Reduction Plan & Flow Monitoring Consultant	\$225,000	High	Ongoing services for I & I detection
5108020-424040	Operating	Maintenance Building Expansion and Renovation	\$235,000	High	Addition to maintenance building
5108020-424050	Operating	Stewart Creek Pump Station Generator Replacement	\$300,000	High	Replace generator at pump station

## Water Resources FY 26 Ongoing CIP Requests

Account	Fund/Project	Title	Amount	Priority	Goal
5128000-424050	SR25-06	Clarifier #2 Rehab	\$725,000	High	Rehabilitation to maintain equipment and extend life
5108030-424050	Operating	Rebuild Aeration Blowers 1 - 3 including MCC at WWTP	\$200,000	High	Replace/rebuild equipment to create resiliency and reduce costly repairs
5128000-424050	WR25-12	Rehabilitation of Filters 2 & 3 at WTP	\$315,200	High	Rehabilitate existing equipment to increase reliability and reduce costly repairs
5108030-424040	Operating	WTP Finished Water Pump #1 Roof Replacement	\$55,000	High	Replace roof to protect personnel and equipment
5108030-424040	Operating	WTP Administration Building Main Roof Replacement	\$125,000	High	Replace roof to protect personnel and equipment

## Water Resources FY 26 Ongoing CIP Requests

Account	Fund/Project	Title	Amount	Priority	Goal
5128000-424050	WR25-03	WTP Lab/Admin Renovation Construction	\$250,000	High	Update building to update facilities to provide better working environment and add space for updated needs
5128000-424050	WR23-44	Replace FWPS #1 High Service Pumps/MCC's	\$725,930	High	Replace equipment that is no longer reliable with updated technology
5108030-424050	Operating	Conversion to Liquid Polymer	\$27,000	High	Convert chemical to enhance water quality, reduce costs, and provide safer environment for staff
5128000-421020	TBD	Land/ROW	\$10,000	High	Annual reserve funding for future land/row purchases

## Water Resources FY 26 Ongoing CIP Requests

Account	Fund/Project	Title	Amount	Priority	Goal
5128000-423010	WR24-02	Water Main Replacement/Rehab	\$300,000	High	Annual funding for future water replacement/rehab needs
5128000-423010	WR25-01	WTP Resiliency	\$25,000	High	Annual funding for unanticipated repairs/replacements at WTP
5128000-423010	WR25-02	Lakes and Dams Improvements	\$25,000	High	Annual funding for future dam improvements
5128000-423010	SR24-01	Infrastructure Replacement/Rehab	\$500,000	High	Annual funding for future sewer replacement/rehab needs

Total = \$5,143,130

## Water Resources FY 26 Vehicle/Equipment Requests

Account	Fund	Title	Amount	Priority	Goal
5108020424020	Maintenance	Replace backup pump for lift station	\$47,905	High	Replacement
5108020424010	Maintenance	Replace Truck #2682	\$65,700	High	Replacement
5108020424010	Maintenance	Replace Truck #2730	\$65,700	High	Replacement
5108020424010	Maintenance	Replace Truck #2637	\$65,700	High	Replacement
5108020424010	Maintenance	Aluminum Tank Mack Truck – Non CDL 2,000 Gallons	\$267,750	High	Addition of truck to haul from lift stations
5108020424010	Maintenance	2026 International Flatbed Dump Truck	\$125,000	High	Addition to fleet
5108020424020	Maintenance	instALERT Message Board	\$30,250	High	Addition of two message boards for DOT projects
5108025424020	Construction	Case CX145D Excavator	\$220,532	Med	Addition to fleet for larger line replacement

## Water Resources FY 26 Vehicle/Equipment Requests

Account	Fund	Title	Amount	Priority	Goal
5108025424020	Construction	Replace CAT Mini Excavator #2708	\$82,000	High	Replacement
5108030424010	WTP	Replace Truck #2622	\$48,726	High	Replacement
5108030424020	WTP	Replace Zero Turn Mower	\$17,000	High	Replacement
5108030424020	WTP	Replace boat	\$33,650	High	Replacement
5108040424020	WWTP	Equipment Trailer	\$10,000	Med	Add to fleet for equipment relocation
5108040424020	WWTP	Replace loader	\$170,000	Med	Replace load for loading cake into dump trucks
5108040-424020	WWTP	Replace Waste Pit pump 1 and 2	\$100,000	High	Replace equipment
5108040-424020	WWTP	Weg Soft Starters	\$14,400	Med	Replace with newer technology

## Water Resources FY 26 Vehicle/Equipment Requests

Account	Fund	Title	Amount	Priority	Goal
5108040-424020	WWTP	Influent Filter Valve Actuator	\$33,112	High	Replacement
5108040-424020	WWTP	Wasting and RAS Actuators	\$19,100	High	Replacement
5108040424020	WWTP	Replace float	\$20,000	High	Replacement
5108040-424020	WWTP	RAS Pump #6	\$13,100	High	Replacement

Total = \$1,449,625

## Water Resources FY 26 Operating Requests

Account	Fund	Title	Base	Increase	Cause
5108010443020	Admin/Eng	Repairs & Maint Bldg	\$1,000	\$4,186	Sprinkler Inspection Contract and repairs
5108010443050	Admin/Eng	Software License & Support	\$35,520	\$31,334	Water and Sewer GEMS modeling software subscription renewal
5108020434040	Maintenance	Technical Contracted Services	\$69,293	\$50,000	Additional ROW Maintenance
5108020443010	Maintenance	Repairs & Maint Equipment	\$0	\$5,000	Funding for aging equipment repairs
5108020443020	Maintenance	Repairs & Maint Building	\$0	\$5,000	Funding for building repairs
5108020443050	Maintenance	Software License & Support	\$18,390	\$17,130	Monitoring contracts for new programs
5108020443500	Maintenance	Repair & Maint Pump Stations	\$150,000	\$30,000	Inflationary costs for repairs on aging equipment
5108020443710	Maintenance	Repairs STs-Dir Cost UT Cuts	\$120,000	\$80,000	Inflationary costs and additional needs

## Water Resources FY 26 Operating Requests

Account	Fund	Title	Base	Increase	Cause
5108020453010	Maintenance	Telecommunications	\$8,449	\$30,682	Inflationary cost increase for monitoring program
5108020456010	Maintenance	Uniform and Shoes	\$26,340	\$1,495	Inflationary
5108020461350	Maintenance	Safety	\$10,700	\$1,020	Purchase of safety barriers
5108020461500	Maintenance	Small Equipment	\$45,815	\$38,968	Purchase small equipment and tools
5108020461610	Maintenance	Meters - New, Replacement and Testing	\$300,000	\$50,000	Inflationary costs and growth
5108020461710	Maintenance	Streets-Dir Cost New Taps	\$40,800	\$50,000	Growth
5108025423060	Construction	Imprmt Cntrct Material & Labor	\$750,000	\$25,000	Infrastructure growth
5108025443020	Construction	Repairs & Maint Buildings	\$0	\$5,000	Funding for building repairs
5108025461350	Construction	Safety	\$11,000	\$1,400	Purchase safety signs
5108025461500	Construction	Small Equipment	\$34,510	\$18,140	Purchase small equipment and tools

## Water Resources FY 26 Operating Requests

Account	Fund	Title	Base	Increase	Cause
5108030443020	WTP	Repairs & Maint Buildings	\$30,000	\$30,000	Building repairs and maintenance
5108030461500	WTP	Small Equipment	\$25,400	\$18,200	Purchase small equipment and tools
5108030461570	WTP	Laboratory Supplies	\$32,630	\$11,630	Purchase small equipment for laboratory
5108040443010	WWTP	Repairs & Maint Equipment	\$191,261	\$23,472	Repairs to aging equipment
5108040443020	WWTP	Repairs & Maint Buildings	\$0	\$5,000	Building repairs and maintenance
5108040458020	WWTP	Training and Travel Exp	\$13,720	\$12,000	Training for additional staff and career advancement
5108040461500	WWTP	Small Equipment	\$3,300	\$3,300	Purchase small equipment
5108040461550	WWTP	Treatment Chemicals	\$383,950	\$25,000	Inflationary

## Water Resources FY 26 Operating Requests

Account	Fund	Title	Base	Increase	Cause
5108040-461560	WWTP	Pre-Treatment Chemicals	\$314,000	\$20,000	Inflationary
5108040461570	WWTP	Laboratory Supplies	\$35,911	\$7,000	Inflationary

Total Increase = \$599,957

## Water Resources FY 26 Personnel Requests

Account	Fund	Title	Amount	Priority	Goal
5108010411010	Admin/Eng	Engineering Technician I	\$96,678	High	Workload to meet engineering and permit needs
5108010411010	Admin/Eng	Civil Engineer I	\$125,259	High	Workload to meet growth demands and permit needs
5108010411010	Admin/Eng	Construction Inspector I	\$96,678	High	Workload to meet growth demands
5108025411010	Construction	Equipment Operator I	\$78,387	High	Workload to meet growth demands
5108030411010	WTP/WWTP	Equipment Operator	\$78,387	High	To meet ongoing maintenance needs at WTP and WWTP plant

Total = \$475,389

## Noteworthy Activities and Upcoming Budget Needs

- WWTP 3 MGD Expansion.
- WTP Updates including lab renovation, roof replacements, filter rehabilitation.
- Professional engineering report assessment of dam's for utilization of grant funding for dam improvements.
- Increase in engineering staff to ensure timely permit reviews and development projects.
- Expansion of I & I program and sewer capital improvements to reduce inflow and infiltration into system.

## Recent Organizational Changes

Water Resources has been realigned under a General Manager and Deputy General Manager.

Additional Management changes include the promotion of Rich Riser to Assistant Director.

Reporting to Mr. Riser will be the Field Operations Manager, Construction and Maintenance Manager, Engineering Manager, and the Utility Services Manager.

## Questions

